

# Project Plan Development Workshop

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# Outline for the workshop

- **DAY 1 - Morning**

Introduction, Process

Writing time mixed with introductions to these topics:

1. Name, organization and country
2. Title of your plan / proposal
3. Background: local issues, needs statement and preconditions
4. Overall Goals
5. Concrete Objectives
6. Beneficiaries
7. Impact on beneficiaries

# Outline for the workshop

## **DAY 1 - Afternoon**

*Writing time mixed with introductions to these topics:*

8. Project implementation plan: step by step outline & description, including schedule and timeline
9. Monitoring and evaluation
10. Possible obstacles to project plan implementation
11. Budget needed, how to raise funds
12. Impact of this training: how this training contributes to your project Plan

# Outline for the workshop

## Day 2

- Morning – Review drafts, Editing
- Afternoon - Presentation skills

## Day 3

- Review, short presentations (10 - 15min each)
- Comments
- Editing of second draft

# Outline for the workshop

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- Introduction
- Getting the most out of today's workshop
- Purpose of today
- Expected outcomes

# Introductions

1. Who has experience writing a grant proposal?
2. Who has experience drawing up an action or business plan?

# Project plan elements

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## Basics

# *An Project Plan is...*

- **A realistic and concrete plan**
- Something you **can implement upon return to your home country.**
- Purpose: simple plan to solve a problem
- Focus: one goal with specific outcomes.
- Using what you got from this workshop **PLUS** the others.

# The project plan

- Everyone will create their own plan – a project that can be done over 6 months to 2 years following this program.
  - Similar to a project proposal.
    - It should be realistic.
- Simple project outline with task description.

# *Project Plan - to do list*

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- Note taking: if you have not started - prepare notes each day
- Draft - start working on your first draft today.
- Today - review the Project Plan writing process in a step-by-step manner.

# *Project Plan - timeline*

- **Written project plan**
  - Preparation and review - TODAY!
  - First draft - prepare for workshop on **July 24**
  - Second draft – prepare for workshop on **July 28**
  - Final project Plan submission – to JICA on **July 30.**
- **Presentation of your project plan**
  - training on **July 24**
  - practice on **July 28**
  - final presentation on **July 30.**

# Project ideas - discussion

*What are some projects you would like to do in your country?*

Your project idea - based on real people's needs

It should be something

- you can do - possible
- something innovative and necessary
- you believe in
- that can be done in a year or so
- it should relate to the theme of this training

# Project examples

Project idea #1 **Youth wheelchair basketball tournament**

**Intro:** *Set up a few local wheelchair basket ball teams for youth 14-18 and 19-24*

Project ideas #2 **Van service for young children**

**Intro:** *Provide transportation to young PWDs to elementary school in city.*

Project idea #3 **Keiko's Kookies for All (KKA)**

**Intro:** *Keiko quits JSRPD and starts her own sweets company trainings and employing PWDs.*

# Project plan step by step

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## Part one

# Top of the document

## # 1 Intro section *(The easy stuff)*

**Name**

**Organization** - project implementing agency

**Country**

## # 2 Title of your project

- You can think more about this later  
should be interesting, simple and short.

# Background

(local issues, direction of policy etc)

## **Local issues - Describe the situation in your country**

- Tell us about the situation in your country
- Give us the basic 5W2H information so we can understand the context
- We should understand the local situation.
- Explain how your project is the solution to the problem
- Use data, quotes, and comments from people in the field about the needs
- Present information on the problem – do not assume they know this information

# Needs statement

- Why is this project necessary?
- People not familiar with your org or country should understand “why” the project is necessary.
- Present information on the problem and why this project can make things better
- Can use quotes, comments from experts in the field showing the needs.

# Needs statement

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Obstacles facing PWDs:

- Difficulties PWDs face in your country and how your project creates a solution to the problem

Opportunities:

- Recent trend
- Collaborations, supporters etc.

# Examples - the need

## Project idea #1 Youth basketball

WHAT - Anna works youth with disabilities. She currently wants to develop more interesting projects to promote team work and health.

WHY- Anna recently saw a wheelchair basketball game in Tokyo. This inspired here.

NEED - There are few fun activities like this in her community and youth are often isolated, She thinks this might make the kids lives more fun and healthy.

OBSTACLES – one difficulty is that there still is discrimination against people with PWDs.

OPPORTUNITIES - sports center support.

# Examples - the need

## Project idea #2 Van service

WHAT - Provide transportation to young PWDs to elementary school in the nearest city.

NEED - The vans project is necessary because people who face mobility challenges have no access to public transport in Saratown. Although there have been many changes in the past 10 years, and there is a school for PWDs, there is no adequate transportation.

LOCAL INFO - There is a government policy for the education of young PWDs, but there are only a few schools. 85% of the youth in Saratown do not have access to primary education because the closest school is more than 2 hours away.

OBSTACLES - lack of public interest. lack of funds.

OPPORTUNITIES - parent and teacher interest.

# Examples - the need

## Project idea #3 **Keiko's Kookies for All (KKA)**

Keiko Nakatani loves sweets and also loves working with PWDs. She will leave JSRPD to start a sweets company run by and employing PWDs.

She has decided to combine her interests and experience because although there have been many changes in Japan in the past 10 years PWDs lack adequate job opportunities

Although there is a government policy for the employment of PWDs, many companies just pay the annual fine and do not bother to take steps to comply with the law.

Keiko decides she can meet the needs of people in her work network AND continue make a living.

# Group work 1: Background

*Discuss then make some notes:*

- Introduce your project idea.
- Why is your project necessary?
- What is the situation in your country?
- Why is your project necessary?
- What might make your project difficult?

# 4. Overall Goals

## **The purpose of your project**

- What is your project's aim?
- What do you want to accomplish?
- In the longer term - what are your goals?
- Include broad, general accomplishments - think about 1 or 2 years

# Examples - Overall Goals

## Project idea #1 Youth wheelchair basketball tournament

- Organize 6 team *wheelchair basketball teams* for local kids to encourage a more active and healthy life.

## Project idea #2 Van service

- Set up a van service to school to increase the number of PWDs in elementary school.

## Project idea #2 Keiko's Kookies for All (KKA)

Our long term goal is provide job opportunities for PWDs so that they may become financially independent. Keiko's socially responsible company also aims to make enough profit to start a foundation to support PWD related projects.

# 5. Concrete objectives

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- What are your short-term objectives?
- Need several of these - 2-5 usually for a short term project
- Concrete and specific.
- Include both qualitative and quantitative
- Some that you can measure
- You will need to carefully monitor these

# Examples - Concrete Objectives

## Project #1 Wheelchair basketball tournament

- Hold a series of games in April 2008
- hire 3 coaches
- train 80 youth working in 8 teams:

6 Male and female teams 14-18 years old.

2 Male teams 19-25 years old.

Sentences -

Our objectives include hiring 3 coaches. Coaches will train the 8 teams in separate groups in Feb. and March. In the first year, we will recruit more than 80 youth, aged 14-25, in B-City.

# Examples - Concrete Objectives

## Project idea #2 Van service

- Get 2 Vans to cover the north district of Saratown.
- transport 25 kids each per day to school.
- Increase the number of PWDs in elementary school to 50%.

In sentences:

Our **goal** is to provide a good education base for young PWDs so that they may become more active in the society in the future.

We have **4 objectives**: In the first 2 months, we find 2 vans and hire 4 drivers on a part time basis. From January 2008, we will transport 25 kids per day. In 2 years we to expand our services to more youth or to more towns.

# Examples - Concrete Objectives

## Project idea #3 **Keiko's Kookies for All (KKA)**

Our objectives include running 3 training programs per year in the areas of bakery mgt, and baking techniques. In the pilot program, we will train 15 people in each and then 10-12 subsequently.

In the first 6 months, we will set-up a bakery that can employ up to 25 staff with different abilities. Within 2 years we will train more than 30 people who will work as full time staff. Within 3 years, we expect that at least 1/2 of them will become financially independent.

KKA aims to produce at least 5 varieties of cookies initially and produce approx. 1 ton of cookies in the first 6 months.

# Group work 2: Purpose

Take few minutes to make some notes about the items below:

Overall goals

Concrete objectives

Talk about these with your partners and then make more notes.

## 6. Beneficiaries - Target audience

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- Who will take part in your project?
- Who is the project for?
- Why is this project meaningful for these people?
- Why would they want to join this project?
- What are their needs?

# Stakeholders - people involved

- There are many types of stakeholders

**Beneficiaries** - your target audience

**Allies/partners/supporters** - family friends, your organizations supporters.

Don't forget about others whom you might be unsure about there are people and groups that can be made into allies.

# Partnerships

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## **Collaborative partners**

- Are there organizations you can work with?
- Who will support you?

# Examples - Beneficiaries/Target audience

## Project idea #1 - Wheelchair Basketball

In the pilot year we will recruit 80 youth with physical disabilities for the teams:

30 males aged 14-18

30 females aged 14-18

20 males aged 19-25

If there is interest, we would like to expand the numbers of youth involved in the future.

# Examples - Beneficiaries/Target audience

- **Project idea #2 Van service**

*The project will target 25 youth with sensory disabilities, living in Saratown where they do not have accessible schools.*

*The school has been designed for their needs but the youth do not have a chance to go there due to transportation.*

# 7. Impact on beneficiaries

How will your project affect your target population?

- The impact on their lives.
- Specific, concrete outcomes
- What will change as a result of your project?

# Examples - Impact on beneficiaries

## Project idea #1 Youth wheelchair basketball tournament

- This project will let youth become more socially active, develop team spirit, social skills and a sense that they are part of the community. We expect this will raise their confidence.

## Project idea #2 Van service

- Access to basic education for these youth will provide with basic skills. This will give them more opportunities in the future.
- Getting these kids to school will make young PWDs more active and visible members of society in the future.

# Group work 3: target/impact

- Think, discuss, then outline:
  - ◆ Beneficiaries - who is your project TARGET audience?
  - ◆ IMPACT - How will your project have an impact on them?

**LUNCH TIME!**

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SEE YOU IN ONE HOUR!

# Outline for the afternoon

- Project implementation plan: step by step outline & description, including schedule and timeline
- Monitoring and evaluation
- Possible obstacles to project plan implementation
- Budget needed, how to raise funds
- Impact of this training: how this training contributes to your project Plan
- Time for questions and writing

# Project Plan outline

- Step by step description of how to implement the project plan
- How to take action
- This is your main focus - outline and methods for making your project happen.
- Methods, timeline, phases of project
- Show a clear time frame for each step and a logical connection.

# Project Plan outline

- Details of how and who will do what you plan
- 7W 2H:
  - ◆ What will happen when?
  - ◆ Who will do what?
  - ◆ How will X be done?
  - ◆ How will you run the project?
  - ◆ How long will each part take?
  - ◆ Where will each happen?
  - ◆ Why => needs statement
  - ◆ WHEN - Include a timeline - Important dates and deadlines

# Project Plan outline

- WHO - People running the project
- Details of who will do what
- Who will run this project? (Existing staff? new staff?)
  - ◇ Assign specific tasks clearly to those who will be responsible for performing them
  - ◇ Who will be the point person to monitor progress? Who will do evaluation?
- What organization(s) will put the plan into action?
  - ◆ Are there organizations you can work with?

# Project Plan outline

- How to do develop this section:
- Brainstorm all the activities that will need to be accomplished.
  - ◆ to achieve your goal and objectives
- Put these in order.
- Outline the dates and steps in more detail.

# Brainstorming what needs to be done

- Brainstorm everything you need to do.
- Cut and add.
- Put in time based order.

# *Project Plan outline*

## **Tips:**

- ◆ Create a timeline - include dates and deadlines.
- ◆ Fill in details.
- ◆ Write the steps in terms of action - start each statement with a VERB.
- ◆ Include all steps - do not think steps are obvious or it is not necessary to explain parts to your plan.

# *Project Plan outline*

Include all phases:

- **Pre-project - Preparation**

Include details on assessment, planning, preparation and preliminary steps that need to be taken before actually running the project

- **Implementation - Running the Project**

How will you run the project?

How long will each part take?

Who will do what when

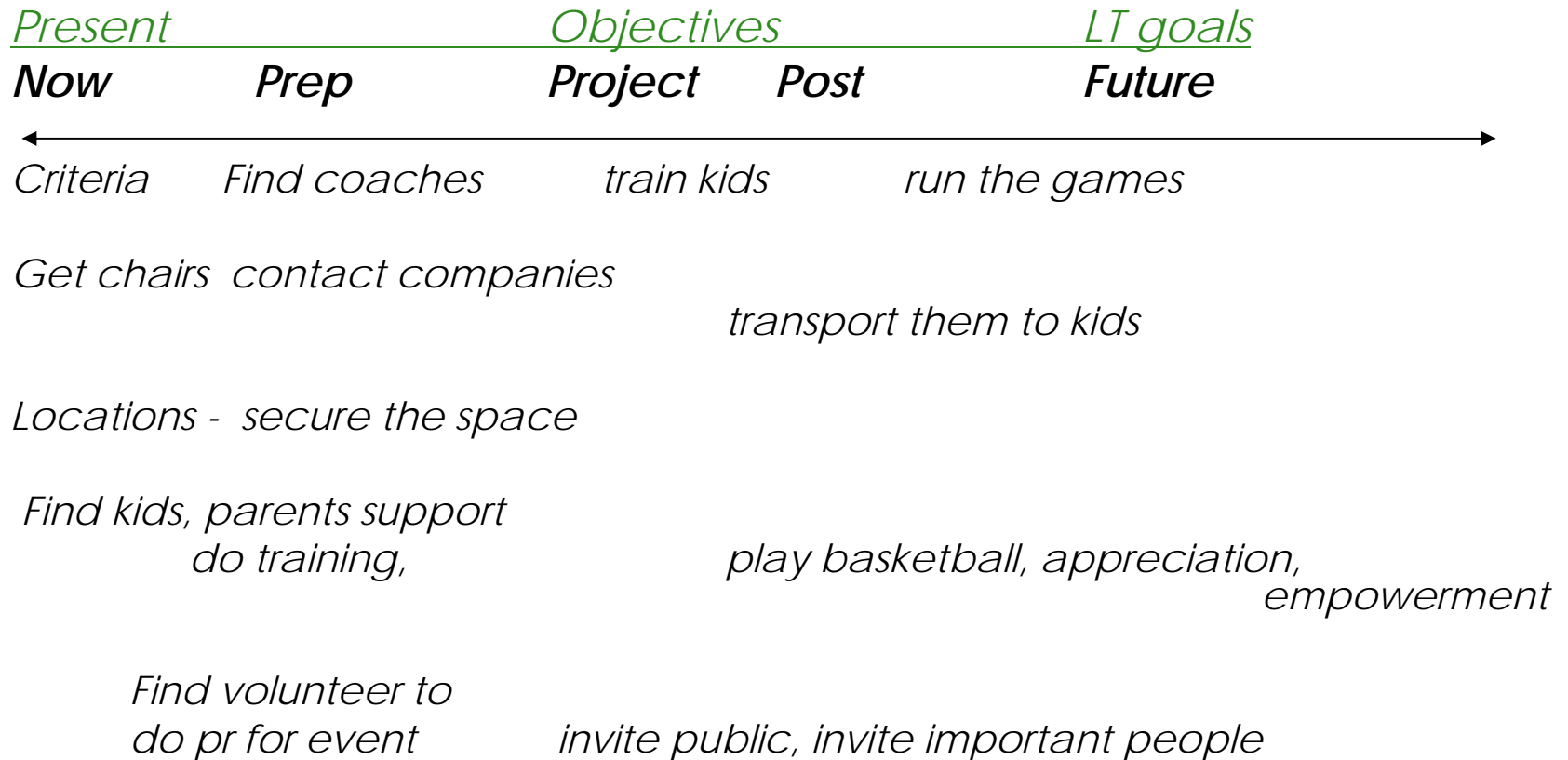
- **Post project - Follow-up & Evaluation activities**

Reports, surveys, PR



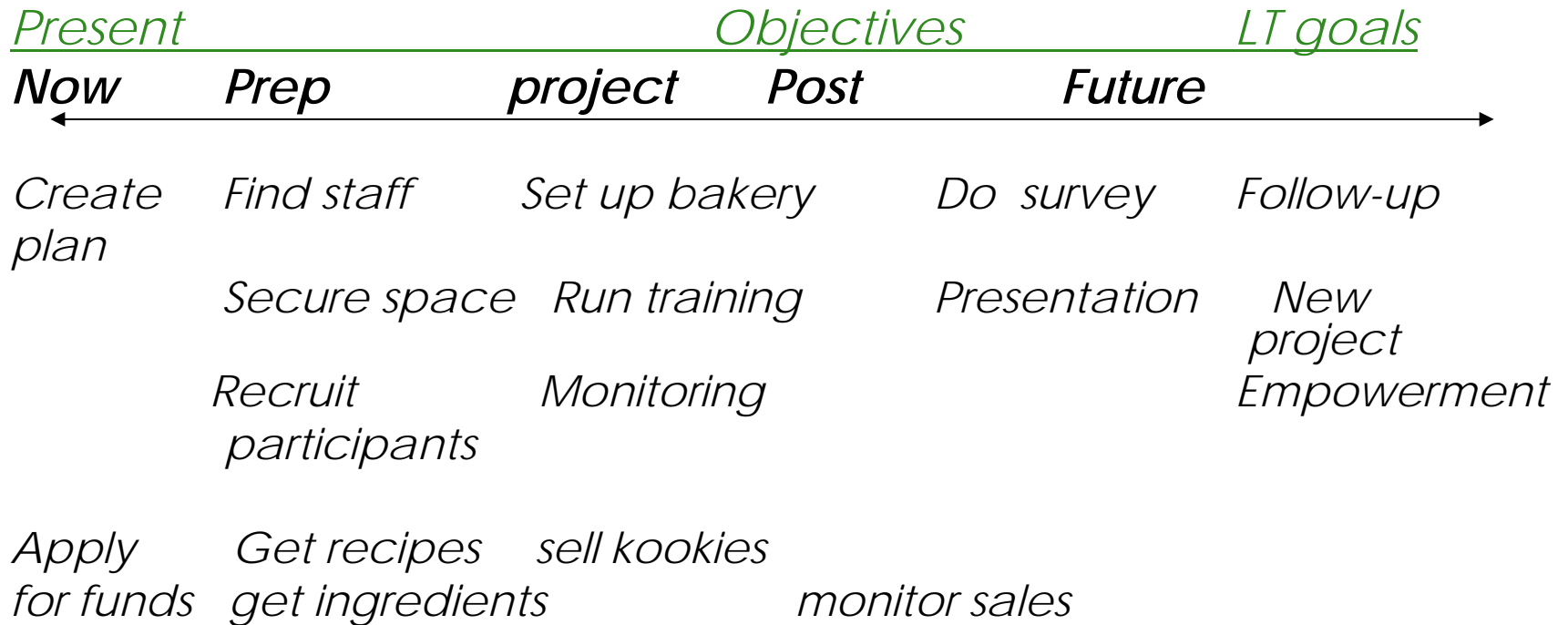
# Project Plan outline - methods

Timeline model - Project idea #1 basketball tournament



# Project Plan outline - methods

Project idea #2 **Keiko's Kookies for All (KKA)**



# Project Plan outline - methods

goal

OUTLINE - step ladder model

For each objective include a very detailed 5W 2H - how to will achieve this

Phase 1  
- objective

Phase 2  
- objective

For each objective include only activities that are directly related to it.

Phase 3  
- objective

now

# Project Plan outline - methods

## Wheelchair basketball project

What - find 3 coaches and find space  
Where - in city center  
Who - Ali => coaches, Me=> space  
When - before Dec 1  
How - thru local sports association  
How much - E10/pay  
How many - materials for outreach

**Phase 1**  
**-Get coach & space**

What - find kids to join teams, get sports chairs  
Where - schools, homes  
Who - Ali to focus on parents; me on school  
When - Dec-Jan,  
How - through company get chairs, through local groups find kids  
How much - E50/transport, E100/materials  
How many - 80 kids people each cycle

**Phase 2**  
**Get kids & chairs**

**Phase 3**  
**training**

What - training  
Where - at sports center  
Who - Ali to focus on coaches; me on kids  
When - Feb - March  
How - meet people at center  
How much - E50, month for space

## goal

80 local kids  
take part in  
basketball  
tournament  
April 2008

now

# Project Plan outline - methods

## Van project

What - find vans and drivers

Where - in town

Who - Ali and me

when - before Nov 1

How - thru local job board and local Nissan dealer

How much - vans donation  
gas \$500/ month; equipment  
\$ 200/repairs drivers  
\$500/month

How many - 2 drivers 4vans

**Phase 1  
Get vans &  
drivers**

What - get student, contact families and schools

Where - in saratown

Who - Ali to focus on parents; me on schools

When - evenings Nov-Feb, March-Jun, July-Sept

How - visits

How much - \$25 for transport

How many - 25 families

**Phase 2  
Find kids**

**Phase 3  
transport**

What - get kids to the school

Where - north saratown

Who - Ali to monitor drivers; I will be in touch with school and parents

When - weekly meetings

How - visits

How much - \$25 for transport

How many -

**goal**

25 kids are taken to school on a daily basis from Jan 2008

**now**

# Project Plan outline

goal

What -  
Where -  
Who -  
When -  
How -  
How much  
How many -

Phase 1  
- objective

What -  
Where -  
Who -  
When -  
How -  
How much  
How many -

Phase 2  
- objective

Phase 3  
- objective

What -  
Where -  
Who -  
When -  
How -  
How much  
How many -

now

# Group work 4: Action

- Outline your plan in more detail.
- Think, discuss then write:
- Step by step
  - ✓ Outline your Plan on a time line
  - ✓ Detail the methods for running the project
  - ✓ what who will do what when

Take a break!

# 9. Monitoring & evaluation

*Using* goals and objectives as a reference point

- Measure progress & outcomes.
- Both qualitative and quantitative impacts
- When will you do this?
- What methods will you use?
- Who will do this?

# Monitoring

Checking for progress during the project itself

- Allows you to make changes when things are not going as planned
- Allows you to adapt as needs and circumstances change.
- Need to involve different stakeholders in this.

# Evaluation

*Post project - follow-up*

- *Checking the impact of your plan*
- Measure the outcomes
- Reflect back on goals and objectives
- When will you do the follow-up?

# *Monitoring & evaluation*

## *Methods:*

- *Interviews (kids, parents, coaches or teachers)*
- Surveys (kids or public attending the games.)
- Visits (parents, sports center)
- Watching and taking notes (classes, training)
- Recordings (classroom, training)
- Checking numbers:
  - ◆ Measuring how many people come to events
  - ◆ Keeping track of how many kids join the training
  - ◆ Keeping track of how many kids show up for van

# Examples Monitoring & Evaluation

- **Project #1 Wheelchair basketball**

*Every 2 weeks, staff will hold a meeting to assess how well we are meeting our objectives.*

*In the third week of training, all participants will have an interview with a staff member focusing on 3 important questions....*

*After completion of training, staff will consult with all trainers on well-being and expectations.*

*Upon project completion we will survey all participants to assess concrete gains due to our training project.*

# Examples Monitoring & Evaluation

## Project idea #3 **Keiko's Kookies for All (KKA)**

### Monitoring

- ✓ Review of trainers by instructors at 2 week interval.
- ✓ "Bakers test" of all trainees after 6 weeks training.
- ✓ Public taste test 2 months before fill time bakery operations start
- ✓ Biweekly sales performance assessment.

### Evaluation -

- ✓ After 6 months running the bakery, each worker shall be interviewed on a one-to one basis to assess impact.
- ✓ After one year, survey of customers
- ✓ Yearly assessment of financial sustainability of each former trainee.

# 10. Possible obstacles

## **Possible obstacles to the implementation of your project plan**

- Paint a clear picture of the difficulties and or obstacles your org or project may face
- Review what troubles you might have in doing this project
- How you might you solve these?

# Project examples - obstacles

## Project idea #1 **Wheelchair basketball tournament**

- Parents seem leery of letting their children join. How do we convince the parents it is okay?
- Will companies sponsor the issues she wants them to fund?

## Project idea #3 **Keiko's Kookies for All (KKA)**

- Business experience?
- Discrimination against people with PWDs?
- Love of sweets => gaining weight?

# GW 5: monitoring, evaluation obstacles

- Think, discuss then write:
  - ✓ How will you monitor your progress?
  - ✓ Who will do this work?
  - ✓ How will you evaluation of the outcomes?
  - ✓ Include methods and personnel
  - ✓ Will you encounter any difficulties? What obstacles might there be?

# 11. Resources - Budget needed and how to raise funds

- What resources do you need?
- Inputs/resources
- What resources do you have?
- Existing

Needed => also  
requires planning

Where will the  
remainder come  
from?

# Preparing your budget

1. Know your project
2. Outline each part of project & assess what you need - in detail
3. Breakdown phases of project and what you will need
4. Get reasonable estimates (may be asked to see quotes)
5. Include overhead/shared costs
6. Make a simple spread sheet
7. Be realistic about staff time and costs

# Preparing your budget

8. Make a complete spread sheet
9. Make sure easy to understand and no errors.
10. Add budget explanation sheet if necessary.
11. Have a third party check it.

*Be as accurate as possible: you do not want to return funds and have to find revenue for other costs incurred.*

# Resources needed

- Expenses:
  - ◆ Administration
  - ◆ Direct project
  - ◆ Overhead/indirect costs
- Revenue
  - ◆ Income
  - ◆ Other funders
  - ◆ Donations
  - ◆ How you will make up for gaps

# Preparing a budget

## EXPENSES:

- Personnel costs (salary, benefits etc.)
- Consultant fees (translation, training)
- Office supplies (paper, pens)
- Equipment (copier, computer)
- Postage/mailing (PR, members)
- Printing (booklets, fliers. Marketing materials)
- Travel (local, domestic, staff, project participants etc.)
- Shared/common (rent, telephone, utilities, internet, etc.)
- Repairs (equipment, office itself)

## INCOME, SUPPORT AND REVENUE

- Earned income
  - ◆ Admission fees
  - ◆ Sales
  - ◆ Ads in program
  - ◆ Table rental
- Grants
- Service contracts
- In-kind items and services
  - ◆ computer, camera, legal, financial
- Gifts
  - ◆ Cash contributions
  - ◆ Prizes
- Other income

# Project examples - budget

## Project idea #1 - **basketball tournament**

### *Possible Costs*

Coach salary

Recruitment of kids

Mailing materials

Postage

Copying/printing

Playing space

Office space

Machinery (computer, fax etc.)

Ads/Outreach/PR mats ...

Shipping

Transport (to meet people, to training, to games)

### *Possible Revenues*

Donated space?

Donated chairs

Cash donations

# Project examples - budget

## Project idea #2 van service

### *Possible Costs*

Drivers salary  
Recruitment  
Mailing materials  
Postage  
Copying/printing  
Office space  
Machinery (computer, fax etc.)  
Ads/Outreach/PR mats ...  
Shipping  
Gas  
Transport

### *Possible Revenues*

Small business grant  
Donated vans  
Donated school materials  
Cash donations

# Project examples - budget

## Project idea #3 **Keiko's Kookies for All (KKA)**

### *Possible Costs*

Trainings  
Recruitment  
Mailing materials  
Postage  
Copying/printing  
Ingredients (flour eggs..)  
Bakery space  
Office space  
Machinery (computer, fax etc.)  
Ads/Outreach/PR mats ...  
Shipping

### *Possible Revenues*

Small business grant  
Donated ingredients  
Donated computer from apple  
Cash donations  
Cookie purchases

# Preparing your budget

## **Look at your plan:**

What do you need money for?

What necessary costs are there?

Where will the money come from?

What possible revenue sources do you have?

# Preparing your budget

- Make a simple spread sheet
- Include all costs
- Make sure easy to understand and no errors.
- *Be as accurate as possible.*

# Preparing a budget sample - project #1 basket ball

<b>EXPENSES</b>	<b>cost</b>	<b># of people</b>	<b>occasions</b>	<b>totals</b>
Coaches	50	4	25	1250
transport	2	80	25	50
PR for kids rec	125	N/A	1	125
PR for event	200	N/A	1	200
staff costs admin	500	3	12	6000
rent office	500	N/A	12	6000
rent sports center	50	N/A	30	1500
			total	15125
<b>REVENUES</b>	<b>amount</b>	<b># of X</b>	<b>total</b>	
donations	50	70	3500	
grants	12,000	N/A	12,000	
			15500	0
			difference	375

# Preparing a budget example - #3 Keikos Kookies for All

<b>EXPENSES</b>	<b>cost</b>	<b># of people</b>	<b>units</b>	<b>occasions</b>	<b>totals</b>
transport	5	15	20	3	4500
ingredients	500	N/A	1	12	6000
PR materials	500	N/A		3	1500
training materials	150	15	N/A	3	6750
staff costs admin	2,500	3	0.5	12	6750
staff cost bakery	2,000	15	1	6	360000
rent office	2000	N/A	0.5	12	12000
rent bakery	5000	N/A	1	10	50000
				total	38850
<b>REVENUES</b>	<b>amount</b>	<b># of X</b>	<b>cycles</b>	<b>total</b>	
kookie income	15	350	3	15750	
donations	50	100	1	5000	
grants	20,000	N/A	1	20,000	
				40750	
				difference	1900

# GW 6: Preparing the budget

FIRST think about what you need  
Outline all possible costs/expenses.  
Where might you get funds from?

THEN, discuss this information in pairs.

Finally, write up a more detailed funding request.

# 12. Impact of this training

How this training contributes to your project Plan

- The knowledge or experience acquired during the training in Japan
- What is the relationship between the training and the project plan?
- What have you learned from the training?
- Give examples of workshops, visits, meetings or lectures that influenced the development of this plan

# Project examples - training impact

## Project idea #1 Wheelchair Basketball

*Through the trainings in Japan, I learned the importance of public events for social acceptance and for the development of confidence. It showed me how much we have in common.*

## Project idea #2 Van service

*During the visit to the South Education Center, I was inspired by Miho Sato's ability to start a project from nothing. Her education project taught me the importance of having a positive outlook. I got some good ideas for creative fundraising.*

# Project examples - training impact

## Project idea #3 **Keiko's Kookies for All (KKA)**

*During the visit to Palette, I was inspired by Taniguchi's ability to start a project that is both socially responsible and profit making. Based on her experience and ideas, I learned how to get started with my own project.*

# Group work 7: learning points

Discuss what you have learned during this program.

How do any of these learning points relate to your project?

Write up an outline of 2 or 3 specific experiences or some more general learning points.

# Questions

- Ask anything !!!!

# Final group work:

## Review & discuss

- Spend 15 minutes preparing your project plan in more detail.
- Then, in pairs, discuss your plans.
- Help each other: give advice and ideas to make each others plans better.
- Make sure all areas are covered

# The project plan - next steps

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To do list:

- Outline your own plan.
- Review the notes from the training thus far.
- Add new ideas & concepts.
- Help each other.
- Write a first draft.
- Follow the outline in the project Plan outline sheet.

# *Project Plan - timeline*

- **Written project plan**
  - Preparation and review - **DONE!**
  - Rewriting & revising - **From now**
  - First draft - prepare for workshop on **July 24**
  - Second draft – prepare for workshop on **July 28**
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Thank you very much!

See you on July 24!

Sarajeon