

BASICS OF PROPOSAL WRITING Work Plan & Budget

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Proposal Development

- **Getting Started with your work plan**
- **People and timelines**
- **Sticking with your work plan**
- **Creating your budget**
- **Sticking with your budget**
- **Tips**

Content

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Executive Summary
Introduction
Project Description
Goals & Objectives
Work Plan
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Staffing & Administration
Sustainability
Organization Information
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Work Plan

- **Work plan is a guide of your activities**
- **You can use the work plan as a project manager/coordinator to plan your work when approved**
- **Some funders are flexible with how the work plan is carried out when approved so be creative but realistic**

SAMPLE Work Plan: Trap Line Development

#	Phase	Task	Completion Date
1	Preparation	Community Meeting	May 15, 2009
2		Hire Coordinator & Youth	May 30, 2009
3		Order Construction Materials	June 15, 2009
4	Construction	Build 2 cabins	August 30, 2009
5		Map trap line routes with GPS	August 30, 2009
6	Reporting	Draft Report	September 30, 2009
7		Community Meeting	October 15, 2009
8		Post maps & report on comm. website	October 31, 2009
9	Follow-up	Evaluation	November 30, 2009
10		Submit Final Report	December 15, 2009

People & Timelines

- **Who will be responsible for each task**
- **The length of time can be used for planning and will also show if you are behind in accomplishing deliverables**
- **funders offer flexibility on who will do the work (e.g. new positions)**

Expenses	Total	Timeline			
		Week 1	Week 2	Week 3	Week 4
Community Support Group					
Open community Meeting					
Conduct Info and Training Session					
Meet Weekly					
Outreach Activity with Youth					
Draft Activity Report					
Present Activity Report to funder					
Other Expenses					
Travel (2 trips)					
Office Supplies					
Community Meeting Refreshments					
Total	\$				

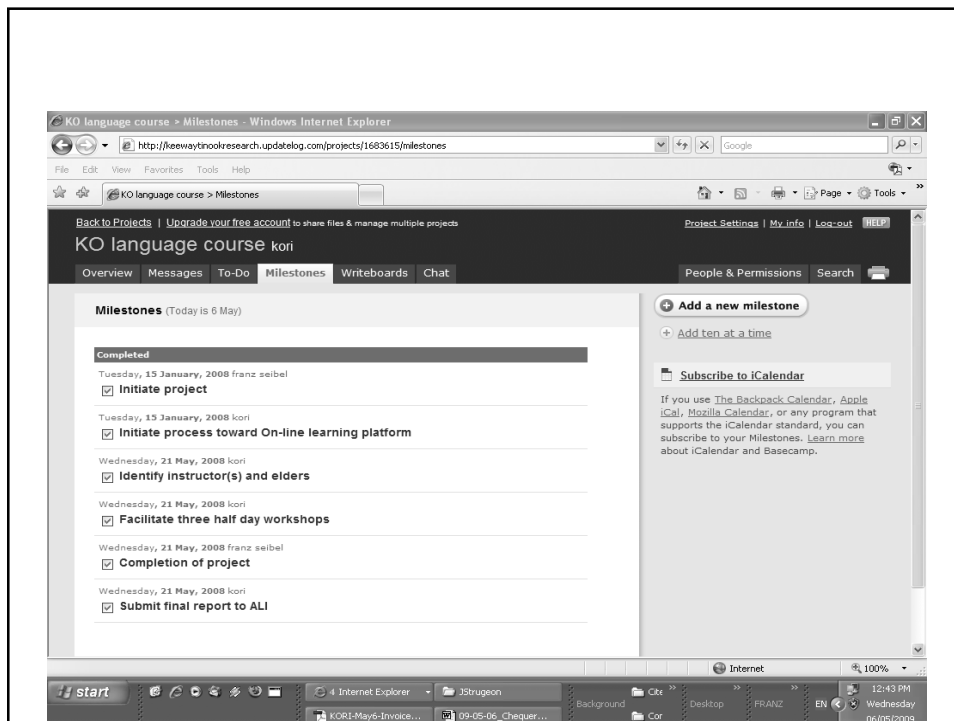
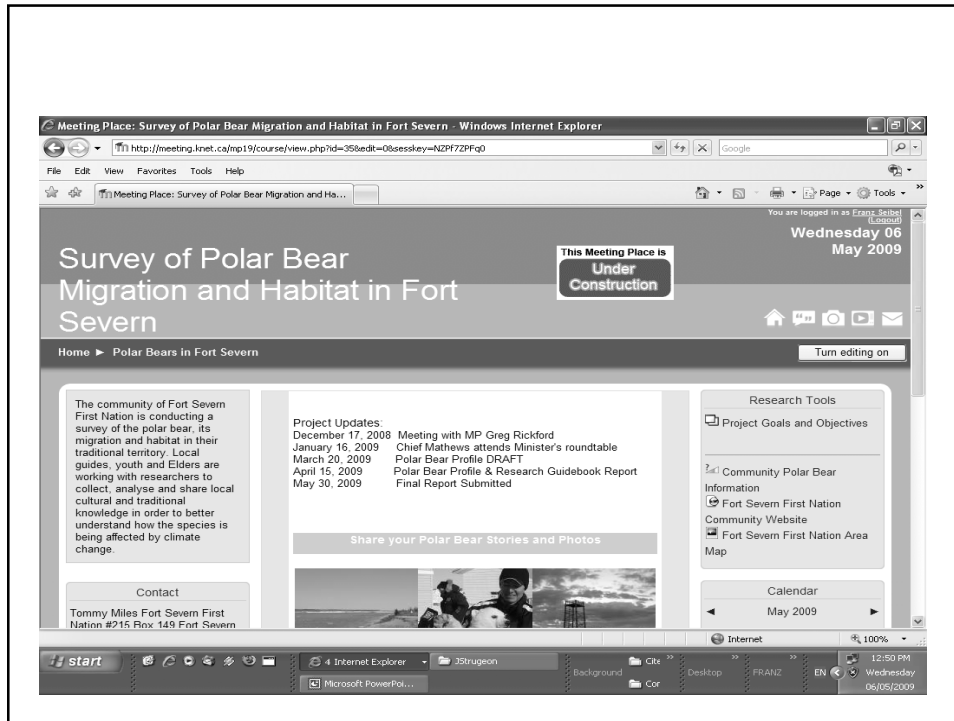
Online work plans

Checkout some free work plans that you can use online to share your updates with partners and staff

**www.meeting.knet.ca
community project websites**

www.myknet.org website (basic)

**www.basecamphq.com
free project management**



Partnerships

- **Find a partner who will help you with the work, has experience and can help your project offer more services**
- **Consider how you plan to coordinate with partners, what their role is and how you will keep them updated. (weekly meetings, online work plan, etc.)**

Budget

Financial description of the project.

A project budget is a reflection of how thoroughly you have thought through your project.

- **The guidelines will indicate what is and is not a valid expense**
- **The budget you submit will be part of the contract and is often not flexible**

SAMPLE BUDGET: Trap Line Development

	Expenses	Description	Total
	Staff		
	Materials		
	Office & Administration		

Budget Details

- **Admin is usually 10% or less**
- **The project has to be for something new, not just funding for an ongoing program**
- **Provide details of how you came up with the numbers**
- **Quotes are recommended for capital purchases and give realistic estimates**

Why Proposals Fail

- **Expenses are not eligible**
- **Not enough detail in work plan**
- **Project is not sustainable**
- **Proof of financial management**

Sticking with Your Budget

Expense	Budget	Amount Spent	Receipts (#)
Detailed description			
Human Resource Costs			
Vehicle Rental and Operation Costs			
Guides to travel on the land and teach youth Lease and operation of ATV & Skidoo. 500/day * 5 days	\$ 2,500.00	\$ 2,500.00	Community receipt #8
Total:			0

Incorporation - Not-for-Profit

- 1. Submit an Application for Incorporation (4 pages) – 3+ directors, contact info & objectives of corporation**
- 2. Choose a unique name**
- 3. Fee of \$155**
- 4. Covering letter giving a contact name, return address and telephone number.**

http://www.ontario.ca/en/business/STEL02_163189

Tips

- Keep in contact with the funder & partners, if you get into trouble, they will be more flexible when they have been kept updated
- Posting the work plan online helps to be transparent, everyone can see what you're doing and how it is beneficial to the community
- The website can also be used as a final report of activities

Next workshop

May 15, 2009

Meet the Funders Q&A

Contact



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