

WWF (Internal) Project/ Programme Proposal Form

This template is to be used for the presentation of project/ programme proposals that are submitted for funding to WWF donor offices. The template is designed to comply with the concepts and terminology present in the WWF Standards of Conservation Project and Programme Management. The latest copy of this document can be found on Connect at [Home > Documents > Network Standards > Programmes > 0. WWF Standards of Project and Programme Management - Overview](#). The template is designed to be applicable to all projects and programmes, although in this document the term “project” is used throughout. The level of analysis and detail expected in the proposal will vary according to scale, complexity and budget. To assess the level expected, it is helpful to view examples of proposals for comparable projects.

If you have already developed a comprehensive strategic plan (action plan + monitoring plan + operational plan) for the project, the majority of the required information will already be available. Where this is the case, you may reference appropriate sections of the strategic plan to avoid duplication.

When submitting a proposal, be sure to delete the guidance text included in this template.

Title Page

PROJECT NAME:

VERSION: (STATE THE DATE)

SUMMARY TABLES

Project Name:	Choose a name which conveys the project's purpose and vision
Project Reference Number:	To be supplied unless it is an ongoing project; then provide number
Project Location:	Specify the region, country, or landscape. State also the Global 200 ecoregion (where relevant)
Project Goal(s):	State the and main goal(s) of the project
Link to Global Conservation Programme (GCP)	Describe very briefly which Thematic Programme and/or Ecoregion Action programme the project contributes to most directly.
Originator of Proposal:	Name and Surname
Department and Organisation:	Name and Acronym
Funding period for the proposal:	Start date - end date
Total budget for funding period:	State the total budget for this donor (noting the contract currency and exchange rate used). Also state the global (total) budget for this project.
Proposal submission date:	dd/mm/yyyy

CONTRIBUTION TO WWF GLOBAL CONSERVATION PROGRAMME

State here the planned contribution from the project to higher level targets (Global Thematic, Ecoregional or Global Policy Initiative targets and milestones). If there is no contribution to higher level targets, please state this here.

Related Global Programme (Global Thematic, Ecoregional, or Global Policy Initiative)	Target/Milestone number	Planned contribution	Year
	Milestone number A	number and unit for quantitative target, or description for qualitative target	yyyy
	Milestone number B	number and unit	yyyy
	Milestone number C	number and unit	yyyy

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ANNEXES

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(Annex 8: Sign off – if required)

LIST OF ABBREVIATIONS

Please provide a list of any abbreviations or acronyms that are used in the proposal.

1. EXECUTIVE SUMMARY

Provide an executive summary for internal and external communication purposes: (@1 page)
N.B. Always write your Executive Summary at the end of the process rather than the beginning.

- Describe the background, the problems and opportunities.
- Outline the strategy making it clear how it addresses the problems and takes advantage of the opportunities.
- Summarise the action plan - goal, objectives, strategic activities, the main risks and assumptions¹.
- Give a brief overview of the human and material resources required (includes identifying partners and key stakeholders).
- Show bottom line WWF budget for the funding period of the project (by funding agency).

2. BACKGROUND AND SITUATION ANALYSIS

(11/2- 10 pages). This section may require subsections and may be one of the longest in the proposal.)

- Describe the project region, ecoregion, area, country, theme (whatever is most pertinent). Explain the biological, social, political, land use and economic context and as appropriate any historical background facts. Focus especially on the people who live in the area (or areas) and/or those who would be affected by the project. Note any flagship or priority species present.
- Clearly identify the main issue(s) or problem(s) to be addressed, including direct threats and indirect threats (root causes) if appropriate. Rank the threats according to appropriate criteria. (It may be helpful to represent any cause-and-effect relationships in diagrammatic form as well as in text i.e. presenting a threat analysis as a conceptual model).
- Identify the potential opportunities that can be exploited e.g. institutional, social, political, commercial, demographic.
- Describe the main actors/ stakeholders and the influence they have.
- Identify significant institutions, activities and programmes of work that need to be involved/ taken into account in designing this project
- Identify and very briefly summarise any documents or evaluations of any forerunner to this work (primarily WWF-funded projects or activities, but also other organisations).

3. ACTION PLAN - GOAL, OBJECTIVES AND STRATEGIC ACTIVITIES²

(4-6 pages)

This section should describe **what you are trying to achieve and how you plan to achieve it.**

The suggested approach is to:

- (a) Summarise the action plan in the form of a **logical framework (log frame)** or similar planning tool, and include this as Annex 1 of the proposal (see examples in WWF Standards folder on Connect).

¹ The use of the terms target and milestones in place of goals and objectives is common in the WWF network; as well as outputs and activities rather than strategic activities.

² As mentioned in Footnote 1 the use of terms is somewhat loose in WWF; also strategic activities can include outputs.

- (b) Expand on the information you put in Annex 1 by describing the action plan here. In particular, explain **why** you have selected particular strategic activities.

The action plan should respond directly to a situation analysis - the challenges, problems and opportunities, and to the recommendations made in any recent evaluation.

The following points need to be described in this section.

- **Vision Statement.**
A brief summary of the project's vision - the desired state that the project will work to achieve either on its own or together with other stakeholders. A good vision statement meets the criteria of being *relatively general, visionary, and brief*.
- **Goal(s).**
State the goal(s) that detail the desired impact(s) of a project, such as the desired future status of a target. A good goal meets the criteria of being *linked to targets, impact oriented, measurable, time limited, and specific*.
- **Objectives.** (Also known as purposes or outcomes).
State the project objectives, detailing the desired specific achievements of the project over the next 3-5 years. A good objective meets the criteria of being: *outcome oriented, measurable, time limited, specific, and practical*. If the project is well conceptualized and designed, realization of a project's objectives should lead to the fulfilment of the project's goals and ultimately its vision.
- **Strategic Activities (and Outputs)**³.
Detail the overall strategy including key strategic activities (and key outputs if appropriate). A strategic activity is a specific action or set of tasks undertaken by project staff and/or partners to reach one or more objectives. A good activity meets the criteria of being: *linked, focused, feasible, and appropriate*. The strategic activities selected should be the most cost efficient/ have highest returns.
- **Risks.**
Clearly highlight the main risks to delivery and explain what you will do to mitigate the risks. Focus primarily on external risks.
- **Assumptions.**
Describe any key assumptions and conditions that need to be met for the project to succeed. This may include comments on the technical and economic feasibility of the project.
- **Further Analysis/ Planning.**
Describe any further analysis or information that is needed before the strategies can be finalised.

4. MONITORING, EVALUATION AND LESSON LEARNING

(1-2 pages. This section will describe how you will measure your success, how you plan to learn from the information you collect and how you plan to take appropriate adaptive action).

- Explain how the project goals, objectives and indicators selected relate to the Global Conservation Programme (GCP) - Thematic Programmes, Ecoregion Action Programmes and Global Policy Issues (a brief paragraph only).

³ Outputs are the immediate results of project activities. It can be useful to state the most important expected Outputs in your Action Plan.

- State your priority information needs that you will monitor, explaining your reasons for selecting these. As a minimum, state what objective indicators will be used to demonstrate the success of the action plan.
- Develop a formal monitoring plan (example format in Annex 2).
- Explain how reporting will be managed to meet the needs of the project team, the WWF network and external donors. Click here for the [Network Technical Progress Report format](#) and here for the [Network Reporting Cycle and R3 Financial Report Template](#).
- State plans for formal periodic evaluations
- Describe how WWF and key partners plan to periodically share, learn from and make use of what has worked well and not so well within the project, supported by the monitoring and evaluation information collected.
- Include the monitoring, evaluation and lesson learning / sharing activities in the project budget and work plan. The cost of monitoring and evaluations should normally be in the range 5-10% of the annual project spend.

5. COMMUNICATION, PARTICIPATION AND INFORMATION SHARING

(1-2 pages). This section is intended to ensure that relationships with key stakeholders are given proper attention within the plan. It should describe the wider group of stakeholders and how they will be involved. (The role of key implementing partners – those who may be seen as part of the wider project team - should normally be described within section 6 of the proposal. But also refer to them here if appropriate.)

- Identify the key stakeholders
- Explain who has been part of the planning phase (describe the steps and who was involved).
- Suggest how communications will operate between participants:
 - How will information be shared amongst the team members and with other stakeholders, and how often?
 - How often will participants meet to review the project?
 - What mechanisms are there for taking decisions?
- State what communication activities will be used and how they will support the achievement of the objectives.
- Include the communication, participation and information sharing activities in the project budget and work plan.

6. PARTNERS AND INTERNAL HUMAN RESOURCES - ROLES AND RESPONSIBILITIES AND CAPACITY

(1-2 pages) This section will indicate the level of complexity of the proposed action, who is responsible for what, and the capacity of WWF and/or its partners to undertake the project.

- Describe roles, responsibilities and the total human resources required to deliver the action plan (partners and WWF). Identify particular skills required for key project roles.
- In Annex 6, include an organisation chart and any agreements (MOUs), team descriptions, job descriptions of key roles, if appropriate.
- Partners/ Key Relationships. Describe which other organisations are operating in this area: other WWF partners and external (e.g. donors (actual and potential), government, private sector, NGOs, local communities).
- Explain why implementing partners have been selected (if there are any). Very briefly detail the history of those partners with WWF.

- Provide an assessment of the capacity of all relevant organisations (including all WWF offices involved and partners), and highlight where capacity needs strengthening to deliver the objectives of the project. This may include skills, physical assets and financial management (or other) systems. State briefly how this capacity will be built. (If capacity has not been assessed the proposal should outline the process for capacity assessment and must budget for this)

7. FUND RAISING

(1-4 pages) This section should detail any funding already secured for the project and the strategy for raising any additional funding needed. Detailed plans may be provided in an annex, either an additional annex, or integrated with Annex 4 – Project Budget.

- Explain the marketing potential of the project to raise additional funds.
- Describe what funding proposals are active, secured or are being considered.
- For funding already secured, describe the funding source, amount, duration and which aspects of the project are being funded by this source.
- For additional funding that needs to be raised, describe the potential funding source the amount, the duration, which aspects of the project could potentially be funded, and when WWF expects to be informed about whether funding will be granted.
- Ensure the fundraising plans correspond to the financial requirements (the budget).

8. LONG-TERM VISION AND SUSTAINABILITY

(2-4 pages). This section should describe your expectations for the project beyond the initial funding period (normally 3-5 years), and how you will ensure that your achievements and efforts can be sustained over time.

- Provide the project's Vision Statement (beyond this funding period, say 15 years) and the expected project lifetime.
- Indicate how this vision may be achieved (thinking perhaps in terms of project phases).
- Set the scene for an exit strategy, or outline a process for this to be developed. Describe the required situation with respect to factors that ensure sustainability such as institutional capacity, political/ social support and sustainable funding. For example, which groups in society will support the project, and which may oppose it? Who will manage the activities after the end of the programme? Do they have the right skill sets to do so? Are they or will they be financially self-sufficient?
- If a continuation, replication or magnification strategy is expected, the rationale should be explained.

Annex 1: Action Plan (logical framework, results chain or similar descriptive)

TASK

To summarize the action plan of what you are trying to achieve and how.

GUIDANCE

The action plan explained in section 3 should be summarised as a simple table - the initial development of a **logical framework (log frame)**. A basic format is shown below. Supporting tools such as conceptual models and results chains are recommended. Guidance and examples are available on Connect at [Home](#) > [Documents](#) > [Network Standards](#) > [Programmes](#) > [2. Design - resources and guidance](#) > [2.1 Action plan: Goals, Objectives & Strategic Activities](#)

Where several donors are contributing to the delivery of one plan, it is recommended to produce one overall action plan, whilst being clear about any restrictions on the use of funds.

It is very important that goals, objectives and activities are developed that meet the defined criteria before attempting to develop the monitoring plan. Where Goal, Objective and Activity statements have been developed that are relatively general, they need to be refined to be specific and measurable.

Some assumptions and risks may run right through the plan. There is no need to state them multiple times.

Action Plan (Intervention Logic)	Assumptions and Risks
<p>Vision Statement. The desired state that the project will work to achieve either on its own or together with other stakeholders. A good vision statement meets the criteria of being <i>relatively general, visionary, and brief</i>.</p>	N/A
<p>Goals: The desired impact(s) of a project, such as the desired future status of a target. A good goal meets the criteria of being <i>linked to targets, impact oriented, measurable, time limited, and specific</i>. Typically these include benefits for people and nature.</p>	N/A
<p>Objectives: The desired specific achievements of the project, usually over the next 3-5 years. A good objective meets the criteria of being: <i>outcome oriented, measurable, time limited, specific, and practical</i>. Typically they are reductions in direct pressure or changes in behaviour, but they could also be improvements in underlying causes/ indirect pressures.</p>	
<p>Strategic Activities (and Outputs): The specific action(s) or set(s) of tasks actions that will be delivered in order to reach the project's objectives. A good strategic activity meets the criteria of being: <i>linked, focused, feasible, and appropriate</i>.</p>	

Annex 2: Monitoring Plan

TASK

To summarize the monitoring plan.

GUIDANCE

- 1) The required format is shown overleaf. It is recommended to produce monitoring plans using Excel, being a much more flexible tool than Word. Guidance and examples are available on Connect at [Home > Documents > Network Standards > Programmes > 2. Design - resources and guidance > 2.2 Monitoring plan](#)
- 2) It is very important that goals, objectives and strategic activities/ outputs are clearly defined before attempting to develop the indicators. They need to be **specific** and **measurable**.
- 3) The number of indicators should be the “minimum but sufficient” required to show whether the Goals and Objectives are being achieved.
- 4) Monitoring at Strategic Activity level should be kept simple and light. It is often helpful to detail some of the main Outputs expected for each year.
- 5) Tracking of changes in assumptions and risks may also be kept simple e.g. in a qualitative way by checking with relevant information sources and networks whether changes have occurred.
- 6) In practice, the monitoring plan may not be complete at the proposal stage but will be finalised in the early stages of implementation. Where this is the case, the plan for completion of the monitoring plan must be stated and included in the work plan (including baseline data collection). The minimum requirement for a monitoring plan at the proposal stage is for information needs and indicators to be defined.
- 7) Columns may be added for:
 - Interim desired result (where the desired result is on a time frame greater than 10 years).
 - Donor (where different internal donors have a strong interest in particular indicators).
 - Result without project (what is expected to happen without the project).

Format for the monitoring plan

Information needs <small>(from the action plan)</small>	Indicators <small>(what will you measure?)</small>	Method/ source of date <small>(how will you measure?)</small>	Location <small>(where will monitoring be done?)</small>	When <small>(timeframe & frequency of data collecting)</small>	Who to provide <small>(who will provide the data to whom?)</small>	Who to use <small>(who will analyse and use the data?)</small>	Related Indicators <small>(Thematic, Ecoregional, GAA, Country etc)</small>	Baseline data <small>(most recent figure and date or when it will be defined)</small>	Desired result <small>(value and date)</small>	Cost <small>(estimate for monitoring the indicator)</small>
Goals										
Objectives										
Strategic Activities/ Outputs										
Risks/ Assumptions							N/A		N/A	

Annex 3: Annual Work Plan (first year)

TASK

To develop a detailed work plan for the first year of the project so it can be updated on an annual basis for project use.

GUIDANCE

Every year a detailed Work Plan will be required; each year an updated workplan must be submitted together with the 3rd quarter financial report on April 30, outlining the main tasks planned for the following year. A suggested format is given below for general guidance. Other formats are equally acceptable provided they include the parameters defined in the template (such as a Gantt Chart is very acceptable).

Notes:

- You may wish to prepare a longer term (3-5 year) workplan in addition to the annual workplan to help plan resources. This will not be necessary if the timeframe and resources for activities is already clear in Annex 1 (Action Plan).
- The Activities and estimated costs in the annual workplan should be used to help prepare the budget. The correspondence between the main activities in the workplan and those in the budget needs to be clear.

Guidance on Work Plans is available on Connect at [Home > Documents > Network Standards > Programmes > 3. Implement - resources and guidance > 3.1 Work plans & budgets](#)

Basic format for Annual Workplan

Strategic Activity - Description and Number.	Tasks/ Sub tasks	Who	When	Cost
		Identify the individual/ organization primarily responsible.	Timeframe from start of activity to completion.	Estimated cost and corresponding budget line

Annex 4: Project Budget (by year for the entire funding period)

TASK

To develop a detailed budget for the entire funding period, related to your action and monitoring plan.

GUIDANCE

1) BUDGETING FORMAT

- a) Please refer to Connect to access the electronic copy of the budgeting template recommended for use in the WWF Network: **Home > Documents > Network Standards > Operations > Finance and Administration > Operational Standards and Recommended Best Practices > Budgeting (Best Practice)**
- b) The recommended budgeting template is structured as follows to help those responsible for preparing budgets follow a **logical** process:
 - i) a worksheet for each project activity;
 - ii) each project activity split by category of costs.
- c) The spreadsheet helps ensure that:
 - i) a unit cost basis of budgeting is applied;
 - ii) the components of each budget line are identified.
- d) The budgeting template available on Connect is recommended but not mandatory. Any format which allows the linking of costs to major groups of activities in the action and monitoring plan is acceptable.

2) BUDGETING PROCESS

- a) Roles and responsibilities:
 - i) Responsibility: the Project Executant⁴ is responsible for establishing the project budget with support from the Finance and Administration team.
 - ii) Support from operational staff:
 - (1) The Project Executant should seek support from the relevant operational department (e.g. Finance and/or Administration unit). **Early** involvement of operational staff is key to the smooth running of projects⁵.
 - (2) Finance staff and/or Project Administrators:
 - (a) have the relevant experience and skills to provide support in drawing up budgets;

⁴ The Project Executant is the person who is in charge of achieving the results of the Project, including responsibility for the production of the technical report and for the project budget. The Project Executant may in some locations be referred to as the Project Manager, Technical Manager (for the Project), or Key Personnel (for the Project)

⁵ Relevant operational staff should be regularly informed of the existence and scale of projects in the pipeline.

- (b) have access to unit cost information and cost recovery information necessary to produce budgets.
 - iii) The co-operation between Programme and Finance and/or Administrative staff in drawing up the budget, as well as a management review, must be documented through an internal approval process.
- b) Cost Recovery
- i) Cost Recovery should be planned in accordance with the Network Standard for Cost Recovery. Please refer to Connect to access the Standard: [Home > Documents > Network Standards > Operations > Finance and Administration > Operational Standards and Recommended Best Practices > Cost Recovery \(Network Standard\)](#)
 - ii) Note the following with respect to Cost Recovery:
 - (1) Compliance with the Network Standard for Cost Recovery at the budgeting stage is key to transparent relations with donors;
 - (2) Liaison with your Finance and/or Administration unit is key to ensure compliance with this Standard.
- c) Other
- i) The aims of Financial Management are to ensure you have **sufficient funds** to achieve the conservation objectives **within the allocated time**. So avoid the usual pitfalls of budgeting within WWF:
 - (1) Do not over-budget⁶;
 - (2) Make sure your budget covers indirect costs (see Cost Recovery above);
 - (3) Ensure that the timing of activities is realistic (e.g. include lead times where recruitments are necessary, assess the likelihood of delays occurring, etc.)
 - ii) Whenever relevant, specify both monetary funds and in-kind resources (this may be most relevant when matching funds are required).
 - iii) Be clear about the currencies and exchange rates used for budget calculation.
 - iv) Budget management: once the project and budget have been approved, use the budget as a management tool:
 - (1) monitor progress against the budget;
 - (2) analyse variances;
 - (3) co-operate with your Finance and/or Administrative unit to prepare forecasts (reviews of budgets in the light of actual events and better known facts)
 - (4) communicate any foreseen change to donors as early as possible.

⁶ There is a natural tendency to use the overwhelming force approach and assume that if we ask for vastly more money than we actually need then there won't be a problem achieving the task. In reality, this approach rarely works.

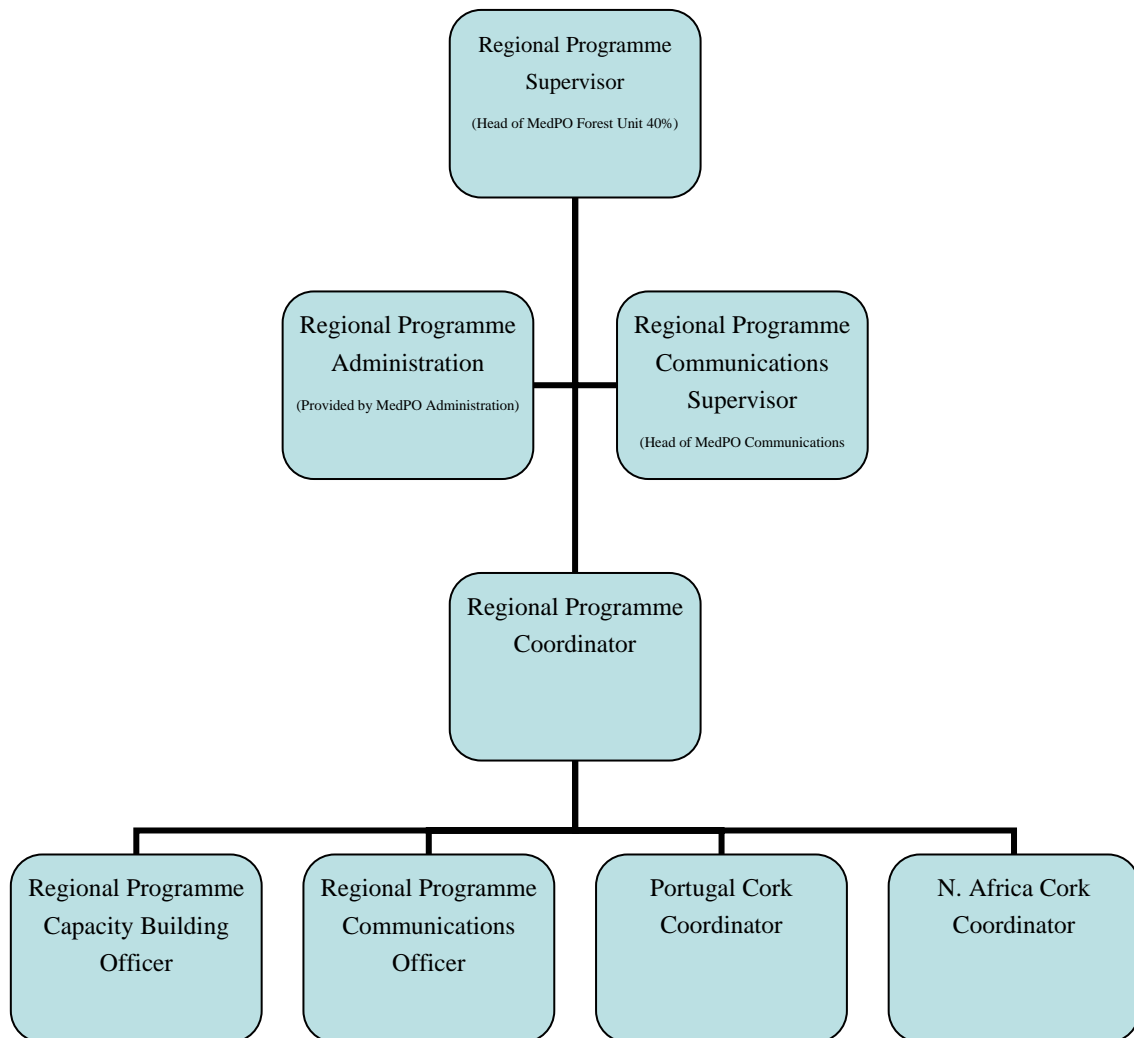
Annex 5: Organizational Structure (WWF and Partners)

TASK

To present the organizational structure of the project and any agreements (MOUs, PIAs), team descriptions, job descriptions of key roles, as appropriate.

EXAMPLE - WWF-MEDPO CORK OAK FOREST PROGRAMME MANAGEMENT TEAM

(Administrative reporting arrangements)



Annex 6: Map

Maps are important for projects that relate to particular sites, landscapes or ecoregions. For such projects, below are some suggestions for maps. Try to keep maps simple.

The following set of maps is required if the project is place-based:

- Show the project area as part of the eco-region
- Show the project area as part of the country
- Show the administrative boundaries covered by the project (states, provinces, districts, etc.)

The following set of maps is optional:

- Biodiversity: past, present and future range of the wildlife concerned
- Topography and settlement pattern of the project area (hills, rivers, roads, settlements, etc)
- Land use in the project area (forest area, agricultural area etc.)
- Problem areas where threats are most severe

Annex 7: References and Bibliography

This proposal will necessarily be a summary of the available information. List here any key documents that have informed this proposal e.g. research papers, analyses, evaluations.

Annex 8: Sign Off – if required

(for a Project Review process. This example is from WWF-UK. The review procedure is different for each funding NO; formal sign off may not be required by some NOs)

<p>SIGN OFF (1): The purpose of signing off this document is to confirm that:</p> <ul style="list-style-type: none"> - it provides a clear and logical explanation of the project's objectives - that the strategy proposed addresses the problem(s) identified - that capacity issues have been addressed and the implementing office/organisation has sufficient capacity and resource to successfully achieve the stated strategy. <p>SIGNED: _____ DATE: _____ (Project Officer) COMMENTS:</p>			
<p>SIGN OFF (2) To confirm that the Fundraising Division/GAA Team have a reasonable expectation of raising funds as outlined in this proposal.</p> <p>SIGNED: _____ DATE: _____ (Fundraising/GAA Team) COMMENTS:</p>			
<p>SIGN OFF (3) To confirm acceptance of the programme and associated costs</p> <p>SIGNED: _____ DATE: _____ (Cost Centre Manager) COMMENTS:</p>			
OTHER SIGNATORIES (REVIEW TEAM)			
NAME	Position	Signature	Date
<p>SIGN OFF (4): For all programmes over £1m lifetime value</p> <p>SIGNED: _____ DATE: _____ (Chief Executive) COMMENTS:</p>			