

Proposal process improvement

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<p>The problem:</p> <ul style="list-style-type: none"> • There were no needs assessments conducted before the call for proposals came out. • The Proposal Outline Sheet (POS) meeting held at the beginning of the proposal development was used as a brainstorm session rather than a decision-making session. Since no further communal decision-making mechanism was in place, people walked away from it with different (and still changing) ideas, which were not properly communicated. • During the proposal process there were a lot of steps that are repeated which wastes time and gives the team stress before the deadline. • Major changes are made right before the deadline, which increased the likelihood of mistakes and caused unnecessary stress. 	<p>The cause:</p> <ul style="list-style-type: none"> • Needs assessments were not prioritized/properly planned, because of staffing gaps in the MEAL team, lack of clarity of responsibilities, and lack of knowledge about the right timing of the needs assessments. • Because of people's busy schedules, many did not have time to come prepared to the POS meeting. Also, there was no clarity on who gives the indication on how much budget to request. • The proposal process was put in an illogical order. The CD and HCP only looked at it at the very end of the process, when there was hardly time to change it. Also, the finance partner started making the TCV before the Medair budget was completely finalized. • The PFM was unaware of all the necessary steps (and people) needed to successfully complete a proposal. 	<p>The change:</p> <ul style="list-style-type: none"> • The PFM conducted a training for all Medair Ukraine staff in the summer of 2023 to explain where funding comes from, who the donors are, how the proposal process works and the importance of needs assessments and observations from staff who travel to the field. • MEAL manger, DCD and PFM started the process of creation of Needs Assessment SOP. • The PFM set up two POS meetings. 1) <u>for brainstorming</u> and indicating the total budget that would be requested from the donor. Anna Coffin provided a useful tool for calculating the project budget, which the PFM introduced in the Ukraine ICP. 2) <u>for decision making</u> after PMs have had a chance to discuss activities, locations and partnerships with PCs, advisors and local NGOs. • The PFM changed the order of the process, allowing PMs to draft the logframe and budget, advisors and PCs to review, PMs to revise and CD/DCD/HCP to approve <u>before</u> writing the narrative and sending the Medair budget to the finance partner. • The PFM created a checklist of all necessary steps of the proposal process and shared it with all Medair PFMs in other ICPs.

The impact

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Although the PFM did not conduct any surveys to concretely measure the change (point of improvement), there are various points of impact that could be seen after the changes.

- Needs assessments are started before the call for proposals comes out (still room for improvement)
- There are fewer major last-minute changes before submitting the proposal.
- The finance partner does not need to rework the TCV as often anymore.
- The PFM made fewer mistakes because of the checklist and was able to hand over more easily to a new PFM because of the checklist.
- Overall, the process is less stressful than it was before.
- The proposal process improvement and the checklist was shared with PFMs in other ICPs, which was especially useful for new PFMs who are still trying to understand how the process works and what their role in it is. Sau Wai is using it as an onboarding document.
- The proposal process improvement was shared during Medair's Introduction to Senior Leadership training in Nairobi in July 2024 so that other ICPs (non-PFMs) can learn from the difficulties and changes that were made in the Medair Ukraine program.