



PROPOSAL AND REPORT TEMPLATES

These templates may be helpful for grant proposals and reports from CBOs who are planning and carrying out a community-driven systems change approach. The following templates and tools are provided here –

- Initial proposal for implementation grant
- Annual renewal form (where annual reports are required)
- Final report for implementation grant
- A description of the participatory learning and action cycle which provides a framing for the integration of learning and action throughout the grant/project.

INITIAL PROPOSAL FOR IMPLEMENTATION GRANT

While this proposal section describes your plan for the entire duration of your grant, the plan that you prepare and submit at the start is **not** fixed. You may have updates, challenges, opportunities, and lessons during your implementation that will lead you to revise your planned actions and strategies. *Please refer to the Participatory Learning and Action Cycle.* Therefore, we recommend that you review this section at least annually and update it as needed to reflect the changes in your implementation plan.

1. Please use this table to tell us your community’s overall vision, goals, and plans for this initiative.

Long-Term (Multi-Year) Vision and Planning	
Vision (dream): What is your dream? What do you ultimately want to see in your community?	
Initiative Planning	
Goals: Desired changes	Signs of success: How will you know you’re making progress?
<ul style="list-style-type: none"> ● ● ● 	<ul style="list-style-type: none"> ● ● ●
↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑ ↑	
Actions that will be carried out in order to achieve the above changes:	Involved stakeholders and their roles:
<ul style="list-style-type: none"> ● ● ● ● 	<ul style="list-style-type: none"> ● ● ● ●
Potential challenges and risks – and how you might address them:	<ul style="list-style-type: none"> ● ● ●
Opportunities and strengths – and how you might build on them:	<ul style="list-style-type: none"> ● ● ●

<p>Learning, reflection, and adaptation: How will you incorporate regular opportunities for learning, reflection, and adaptation with the community? How will you capture the learnings?</p>	<ul style="list-style-type: none">•••
<p>Sustainability: What are your thoughts on whether and how this work will be sustained at the end of the initiative?</p>	<ul style="list-style-type: none">•••



2. Please share your plans in more detail for the first year of this grant funding. Include activities for *learning, reflection, planning, and action*. (See Participatory Learning and Action Cycle at the end of this template.)

Year 1 Plan				
Goal What is the goal you are working towards? You can use the same goal for multiple rows. Multiple actions can contribute to a single goal.	Actions What actions will be carried out towards this objective? Also include feedback loops, check-ins among stakeholders, and deeper learning and reflection with communities.	Stakeholders involved Who will lead this? Who else will be involved?	Approximate timeline When do you think this will be carried out? E.g., March to June, 2021	Resources required What are the resources needed to complete the activity? e.g., human resources, skills, contributions, any materials and/or grant funds (don't need specific amounts).

ANNUAL RENEWAL FORM

This work is a continuous cycle of learning and action. We want to understand how things went over the last year.

1. In general, how did things go over the last year? Please tell us the things that you think are most important to share and discuss.

2. At a high-level, please tell us about the different actions that were planned and how things went or are going.

Actions that were planned Please list the actions that were planned at the beginning of the year. (Copy from proposal)	How did things go? // How are things going? Were the actions carried out as planned? Who was involved? How did things go or how are things going?	What are you learning from feedback, observation, discussion, and reflection with your community?

3. What are some of your main successes? What are you proud of?

4. What was challenging? What are you concerned about?

5. While you and your communities have developed your high-level vision, goals, and action plans, we understand that these may change over time, as you receive feedback and learn and reflect. Please describe any changes to your overall initiative vision, goals, and objectives. If there are no changes, you can skip this question.

6. Please share your plans in more detail for the coming year of this grant funding. Include activities for *learning, reflection, planning, and action*. (See Participatory Learning and Action Cycle at the end of this template.)

Annual Workplan				
Goal What is the goal you are working towards?	Actions What actions will be carried out towards this goal? Also include feedback loops, check-ins among stakeholders, and deeper learning and reflection with communities.	Stakeholders involved Who will lead this? Who else will be involved?	Approximate timeline When do you think this will be carried out? E.g., March to June, 2021	Resources required What are the resources needed to complete the activity? e.g., human resources, skills, contributions, any materials and/or grant funds (don't need specific amounts).

7. What feedback can you give us around our grantmaking, capacity strengthening support, and interactions with you? Where are we doing well? How can we improve?

FINAL REPORT FOR IMPLEMENTATION GRANT

This work is an iterative cycle of learning and action. We want to understand how things went over the last year.

1. In general, how did things go during the implementation period? Please tell us the things that you think are most important to share and discuss.

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2. At a high-level, please tell us about the different actions that were planned for the implementation period, and how things went or are going.

Actions that were planned Please list the actions that were planned at the beginning of the year. (Copy from proposal)	How did things go? // How are things going? Were the actions carried out as planned? Who was involved? How did things go or how are things going?	What are you learning from feedback, observation, discussion, and reflection with your community?

3. Reflecting back on the whole initiative, please share your achievements, challenges, and learnings moving forward.

4. What feedback can you give us around our grantmaking, capacity strengthening support, and interactions with you? Where are we doing well? Where can we improve?

PARTICIPATORY LEARNING AND ACTION CYCLE

We recommend that you include opportunities for learning and reflection into your workplan for the entire timeline of your program implementation. The diagram below shows how learning, reflecting, planning, and acting can occur in a continuous cycle.

Using this model will help you to:

- LEARN - about the emerging issues and root causes.
- REFLECT - with various stakeholders on validating the root causes.
- PLAN - through prioritization of root causes that are major contributors to the undesirable condition identifying community actions and various stakeholder roles in addressing the root causes
- ACT - whereby CBOs work with their stakeholders including relevant communities to implement community actions.

Ongoing learning and reflection activities should be included in your workplan as they will have a positive influence on your planning and action. As you learn more and reflect on key issues that affect your work, the learnings may lead you to make changes to your workplan and program activities that will strengthen your impact and help you to achieve your goals.

