



# Project Proposals That Work

From Concept to Action

## **Project Background**

The Rethinking Transport project supports the development of positions and strategies for the sustainable transformation of the transport sector on the African continent. Through workshops, development labs and a fellowship program, the project will bring together stakeholders from academia, civil society and the private sector and facilitate an exchange on the most pressing issues surrounding sustainable mobility in Africa.

Rethinking Transport is a GIZ self-initiated project. It is funded by GIZ's own resources and implemented by GIZ in cooperation with the German think tank Agora Verkehrswende.

## **About Changing Transport**

We enable the rapid development of zero emissions transport systems to shape a liveable and just future. GIZ works on changing transport towards a sustainable pathway and facilitating climate actions in mobility. We support decision-makers in emerging and developing countries through training and consulting services, as well as by connecting stakeholders. Our ultimate goal is zero-emission transport. You can learn more about our projects on [www.changing-transport.org](http://www.changing-transport.org).

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## List of Acronyms and Abbreviations

|     |  |
|-----|--|
| AI  | Artificial Intelligence  |
| CV  | Curriculum Vitae   |
| GIZ | Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH |
| GPS | Global Positioning System  |
| IRB | Institutional Research Board                                       |
| M&E | Monitoring & Evaluation  |
| PDF | Portable Document Format   |
| PID | Project Initiation Document  |
| RfP | Request for Proposals  |
| RfQ | Request for Quotes   |
| SoW | Scope of Work  |
| ToR | Terms of Reference   |

# 1 Who Is This Toolkit For

This toolkit is for you if you have a new idea for a transport solution or project and are looking for guidance on how to develop a successful proposal. Whether you are seeking funding or support from partners, this toolkit provides the steps to help you turn your idea into an actionable plan.

The toolkit will also help if you are responding to a request for transport-related project proposals from funders, institutions, or governments, offering guidance to increase your proposal's chances of success.



The principles, templates, and guidance in this toolkit can be used for almost any other type of project outside of the transport sector too.



## 2 How to Use This Toolkit

This toolkit offers guidelines for developing and writing a compelling project proposal. This could be a proposal based on your own original concept or a proposal in response to a formal Request for Proposals (RfP) from a donor, funder, or institution.

The toolkit starts with explaining some of the terms funders might use, and then describes the elements that can make your proposal more persuasive and convincing. These elements include presenting the evidence you use to demonstrate why your project matters, outlining the method and causal pathway to ensure success, and discussing how your proposal needs to answer the specific questions, or the scoring criteria set by the funders. It also offers guidance for developing graphics and choosing fonts to enhance your proposal's clarity and impact.



The toolkit includes several visuals showing templates, timelines, and infographics. These have been adapted from different sources and applications, to share ideas and options. When preparing your project proposal, it's important to choose one consistent style or design and apply it throughout, rather than the variety used here.



### 3 When to Use This Toolkit

The toolkit pays extra attention to proposal elements that are not always taught in transport or engineering studies. These are elements such as a Theory of Change, a Logical Framework (a 'logframe'), and monitoring and evaluation (M&E) components, which are more commonly found in programme rather than research or project design.

Including these elements in a project proposal will not only make your proposal more convincing, but will also help structure your thoughts while you are working through your concept. These elements focus on accurately diagnosing both the problems and the solutions for a potential research, programme, or project intervention.



Figure 1: When to use this toolkit. This infographic was drawn using a free online tool called genially.com.



## 4 Terms and Concepts

These are some of the terms you will commonly find or use when writing or reviewing documentation for project proposals.

| Term  | Explanation  |
|---|--|
| <b>Request for Proposals (RfP)</b>                | A Request for Proposals (RfP) is a document inviting bids from potential consultants or service providers. It will usually include a ToR and a SoW (see below) and will require that you deliver a project proposal, but it might be broader and ask for a proposal within wider field.  |
| <b>A project proposal</b>                         | This is detailed explanation about how you will best meet the requirements of a formal Terms of Reference (ToR) and how you will deliver the best project, or how you propose to deliver a project that is independent of an RfP. This guideline focuses on writing project proposals.   |
| <b>Request for Quotes (RfQ)</b>                   | In a Request for a Quote (RfQ), the funder or organisation already knows exactly what they want and are simply looking for prices from service providers or consultants; they do not expect a project proposal.  |
| <b>Terms of Reference (ToR)</b>                   | A Terms of Reference (ToR) is a document that includes background information about a project and project objectives, as well as the activities, tasks, and resources required of a project team, the qualifications the team must have, and project deadlines. A ToR includes the SoW.  |
| <b>Scope of Work (SoW)</b>                        | A Scope of Work (SoW) is a description of the extent of the work that is being asked for, or that you are committed to doing.<br>Think of a SoW as the boundaries of the project: if you do not deliver according to the SoW, your work will not be accepted as complete; at the same time, this is where you set the boundaries and not deliver more than you committed to. A SoW will include an overview of what the project entails, the fixed project deliverables (how many, how much, how often, by when), and important, the exclusions (what the project or budget does not include, such as travel costs, printing or, design costs, catering, etc). |
| <b>A concept note</b>                             | A concept note is an outline of your proposed project, and must at least include an introduction, background, objectives, intended results, and budget overview.<br>When writing your concept note, keep it to four pages at most (you will find that some funders or donors ask for a maximum of two pages).  |
| <b>A research proposal (or research protocol)</b> | A research protocol is a detailed explanation of how scholarly or scientific research will be carried out. This could be part of a project proposal. The appendices in this Toolkit provides an outline for the information usually required in a Research Proposal.   |
| <b>Project Initiation Document (PID)</b>          | A project initiation document, also known as an inception document, is a living document that is delivered once a project has been awarded but before implementation begins. This document sometimes replaces the ToR once the project begins and can be included in the project contract. It acts as a single source of reference throughout the project, and can be used by all team members to assess progress and document decisions   |

## 5 Key Elements of a Good Project Proposal

Some Requests for Proposals (RfPs) ask for a response to a direct, specific and detailed Terms of Reference (ToR), and others ask for a proposal within a wider field. For example, a funder could ask for proposals about ‘improving access to climate finance in middle-income countries’ or ‘research about low-carbon transport in low-income countries in Asia’.

This Toolkit covers both types of project proposal. The section titled ‘Developing your own proposal’ considers new proposals, and the section titled ‘Responding to a Request for Proposals’ builds on this and includes additional RfP-specific guidance. These are key elements of a project proposal for both types of proposal.

A good project proposal:

- Captures the essence of the project in one introductory paragraph
- Is clear about the problem that the project intends to solve
- Explains how the project builds on, or is different to, other projects that focus on a similar problem
- Indicates how the project aligns with the funder’s values
- Describes how the project contributes to the funder’s overall objectives
- Presents a robust research method (in a research project)
- Takes research ethics seriously
- Shows an understanding of the project’s challenges and risks, and explains how these will be overcome or mitigated
- Has a clear budget attached to timeframes
- Includes a clear list of deliverables and outcomes, to show how the project’s success will be measured.



Figure 2: What makes a good project proposal?  
This infographic was drawn using a free online tool called napkin.ai.

## 5.1 Introduction

This outline might look like a lot of information to put into only one or two pages of introduction, but each item needs simply a sentence or two. Often, it is best to write the introduction once you have completed the rest of the project proposal.

- **What** is the project about?
- **Who** will implement it?
- **Where** will the project take place?
- **Why** is the project needed?
- **What** will happen if the project does not happen?
- **How** will the project be implemented? **What** exactly will take place?
- **When** will the project take place?
- **How** will you measure the success of the project?

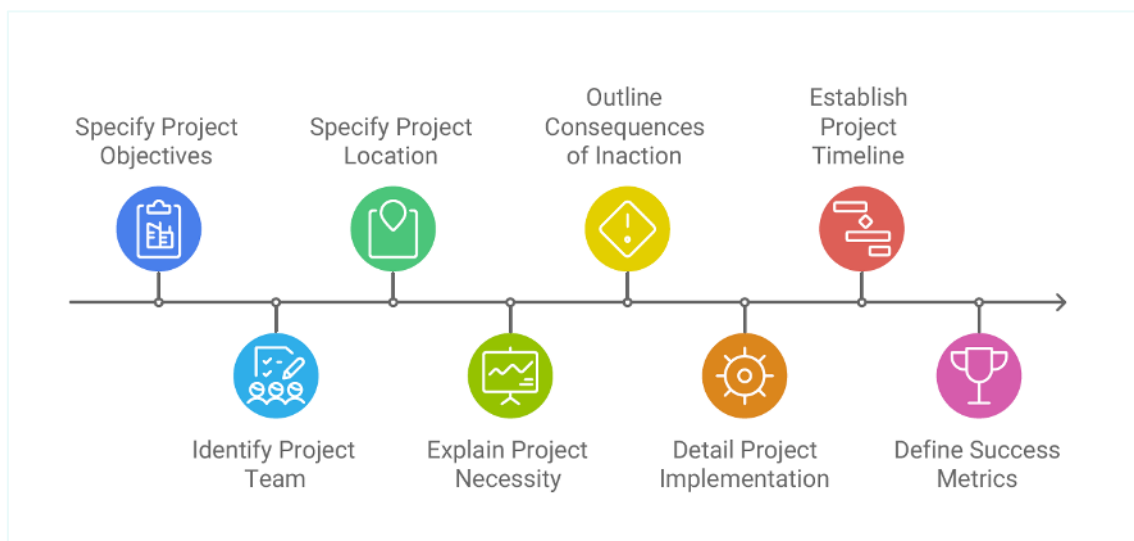


Figure 3: What makes a good proposal introduction?  
This infographic was drawn using a free online tool called napkin.ai.

## 5.2 Expanding on the Introduction

### 5.2.1 Diagnosing the Problem: Writing the ‘Problem Statement’

In a proposal, the problem statement is particularly important: this is where you get to convince potential funders about the need for your project. No brilliant methodology or expert project team can make up for a vague project justification.

While still thinking about your project, ask yourself the following questions to be sure you have accurately diagnosed the problem:

- What is the problem you wish to overcome in this project?
- Why does the problem matter?
- Who does the problem matter to?
- What have other projects done to try to overcome the problem?
- What have you learned from these other projects? How will your intervention or solution be different to others? Or how will it build on earlier interventions?

Once you start writing, first briefly describe the context or setting for your proposed solution. Depending on the proposed project, this could include facts and figures such as road fatality numbers, emissions data, poverty data, information about the growth in motorisation, the cost of public transport, the regulatory environment, modal splits, etc.

- What is the specific problem that this contextual data reveals?
- What are the immediate implications or impact of this problem?
- What will be the implications or impact if this problem is not overcome in the long term?
- What evidence is there that solving this problem is worth the investment?
- How have other organisations, projects, programmes or policies tried to overcome the problem?

A good problem definition will read something like this:



The problem is \_\_\_\_\_ because of \_\_\_\_\_. The problem affects \_\_\_\_\_ people/countries in \_\_\_\_\_ [this way]. \_\_\_\_\_ [social, economic, resource, knowledge, or political issues] are barriers to resolving the problem. Evidence shows that \_\_\_\_\_ [problem] is worth investing in because \_\_\_\_\_.

## 5.2.2 Revealing the Root Cause of the Problem

A root-cause analysis uses a ‘fishbone’ diagram, and looks backwards to identify what might be causing the problem. With an understanding of the root causes, you can develop effective activities to intervene. This is often where projects fail, by investing in the wrong problem, or assuming the wrong cause.

Ask yourself:

- Which is the most important root cause to work with?
- Which root causes are the easiest to work with?
- If your project addresses only one root cause, will the project still succeed?

Once you start writing, explain the underlying issues contributing to the problem:

- What are the root causes of the problem you have outlined above?
- What factors shape this problem? Socio-economic factors? Political? Regulatory? Institutional? Technical capacity? Other?

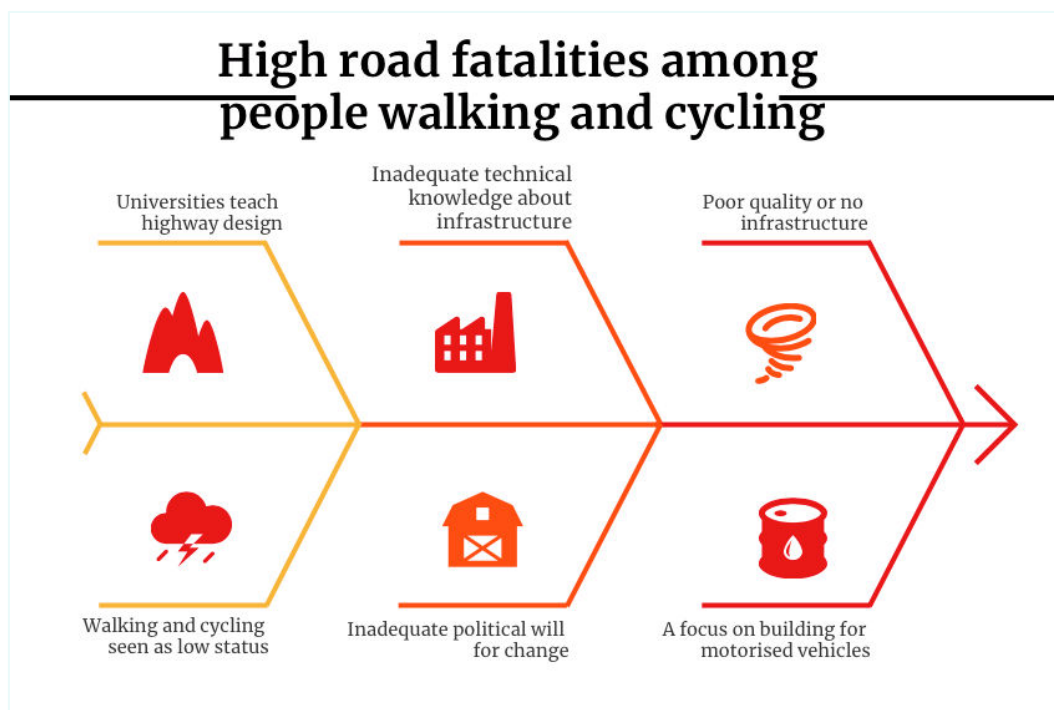


Figure 4: An example of a Fishbone diagram for a root-cause analysis. This fishbone diagram is an attempt to understand causes of high road fatalities among people walking and cycling (of course each of these root causes have their own root causes too...). This infographic was drawn using a free online tool called [venngage.com](http://venngage.com).

Now take a step back, to double check that you have diagnosed the problem correctly. For this, even though you are in concept development stage, it is a good idea to consider the views of stakeholders.

Stakeholders are people who are affected by the problem, or whose activities affect the problem; they are also people who are able to influence reactions to your proposed solution in some way, for good or bad, or support its implementation. You would not be conducting formal and extensive stakeholder engagement at this point (this is a skill best left to engagement professionals), but it is good to have some idea of what these stakeholders would think; do this by a scan of media sources, for example, or through informal discussions within your network.

### 5.2.3 Describing Your Proposed Solution

Once you have made the case to potential funders or partners about the extent of the problem and the need for an intervention, next describe your proposed intervention or solution.

The ‘solution’ section of a proposal needs to set out exactly what the project will do (what actions or activities will take place) and what the activities will lead to:

- What outputs will they lead to, such as research that develops a new type of public transport, and a prototype of a new bus
- What outcomes will they lead to, such as a new way of travel
- What will be the impact, such as improved air quality.

First describe your proposed solution to the problem:

- Explain step-by-step how your proposed project / solution to the above problem will work.
- Will your solution address any of the root causes to the problem?
- What progress has already been made to address the problem?
- How is your solution different to the solutions others have tried? What gap is your solution going to try to fill?
- How will it build on or complement the solutions others have tried?
- Why is your proposed solution particularly relevant or appropriate to the country or city context?
- How does your proposed solution support or align with the goals or objectives of the country?



The solution you propose could be further research, and a research report; thus your immediate deliverable might not have practical or implementable activities and impact, but ultimately you hope that your research translates into action.

## 5.2.4 Strengthening the Argument for Your Proposed Solution

To strengthen the argument for your proposed solution, develop a Theory of Change and Logical Framework, to show **why** you will do what you propose. Later in the proposal, your workplan will show **when** you will do **what**, and **who** will do it.

To persuade someone of the value of your project or research, it is extraordinarily useful to support your approach by showing your intended roadmap from diagnosis and planning to interventions to results.

Ask yourself:

- What is the purpose of your project?
- What do you hope will change as a result of the activities in the project or answers to research questions?
- What do you presume about the situation you are working in? For example, you might assume that stakeholders or beneficiaries want change or a deeper understanding of local challenges, and that they want the change you are proposing. Are these assumptions true?
- What will project activities or research findings lead to? For example, will a workshop (an activity) lead to a report (an output)? And if so, what change will the report lead to (an outcome)?
- How will you be sure that there is change (an impact)?
- How will you be sure that the change is a result of your research or project (and not something that would have happened anyway)?

**Impact:** When writing your proposal, note the main expected change that your proposed project or research will bring about (‘before’ and ‘after’) in the long term – this is the impact. Do you expect a different change for different target groups or beneficiaries?

**Outcomes:** What are the more immediate or shorter- to medium-term changes your proposed project will bring about (depending on the length of your project, this could be within a few weeks or months)? List and number these outcomes, ensuring that at least one outcome focuses on behaviour change (short-term) and one on system change (medium-term).

A research project might not have outcomes; usually you would propose ‘deliverables. Nevertheless, consider the purpose of these deliverables – what will they lead to?

**Activities:** what activities need to happen to achieve the outcomes? List the activities for each outcome (verbs could include ‘organise’, ‘develop’, ‘support’, ‘host’, ‘write’.

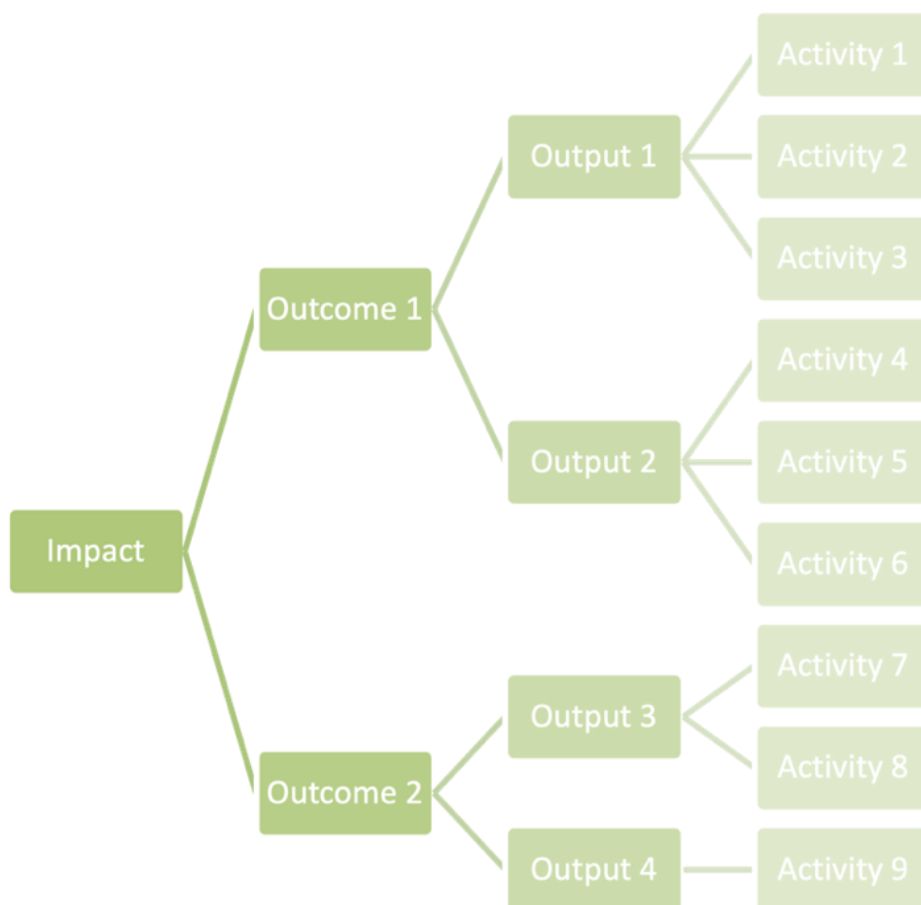


Figure 5: Example of a flow diagram showing how activities lead to outputs, which lead to outcomes and impact. Diagram using Smart Art, Microsoft Word.



You don't need to include a detailed Theory of Change graphic (see below) in your project proposal, but it is a good idea to know what your Theory of Change is and describe it in a paragraph.

Review and revise this narrative statement over and over until you are sure that the 'causal pathways' makes logical sense. Are you sure that if you do X, then Y will happen, and that Y will lead to Z?



A narrative Theory of Change could read something like this:

Formative research shows that if we do [the following actions], this will achieve [the following outputs], which are essential to achieve [the following short-term and medium-term goals], which will eventually lead to [the ultimate project goal].

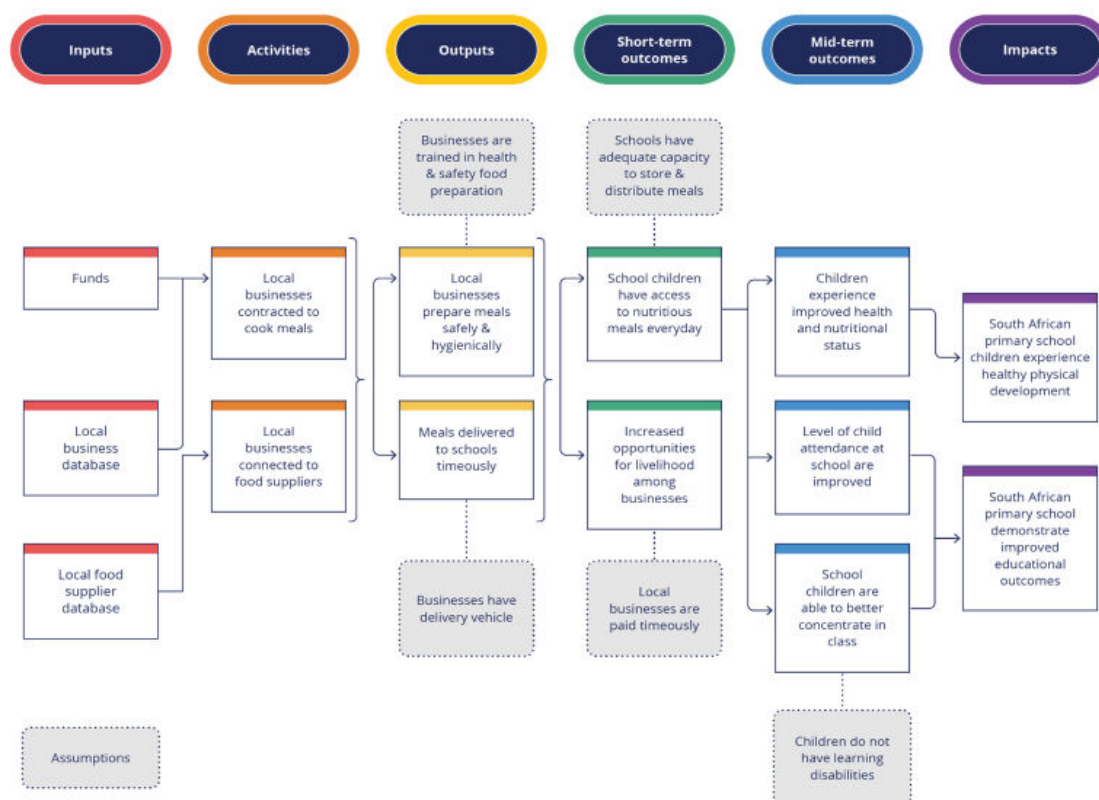


Figure 6: A visualisation of a Theory of Change. This graphic is taken from the University of Cape Town's Programme Management (Monitoring and Evaluation) short course, 2024. The visualisation shows inputs, activities, output (short and medium-term) and impacts, for a school-feeding programme in South Africa.

A Logical Framework (logframe) takes the Theory of Change a step further and shows how the interventions (activities, outputs, and outcomes) can be measured.

In a table, list Impact, Outcomes, Outputs, and Activities, and include a column for Indicators. These show how you will you measure this change (in other words, how will you know this change has taken place?).



Double check that the indicators you propose are achievable. Rather don't be over-ambitious – if a project is audited or evaluated after it has been completed, the evaluator will measure the project's success against these indicators.

A research project might not have outcomes, indicators, or an implementation and action plan – or these might be beyond the scope of your proposal or work. But always think about the purpose of research outputs and deliverables – what will they lead to?

Table 1: Example of a Logical Framework, using a simple Microsoft Word table.

|                   | Summary   | Indicators   | Means of verification  | Risks and assumptions  |
|-------------------|---|--|--|--|
| <b>Impact</b>     | Reduce road traffic fatalities in Lilongwe by 10% within three years.   | The number of road traffic deaths; the ratio of crashes and fatalities.                  | Hospital and police records.   | Risk: Records might be inaccurate.<br>Risk: direct causation might not be attributable.  |
| <b>Outcomes</b>   | Road safety is improved in Lilongwe within three years.   | The number of road traffic deaths is reduced.  | Hospital and police records.   | Risk: Records might be inaccurate.<br>Risk: direct causation might not be attributable.  |
| <b>Outputs</b>    | 1 000 people receive road safety sensitisation exposure.<br>Road safety sensitisation is designed based on research evidence. | Number of people receiving sensitisation.<br>Research report is used to design campaign. | Sample survey conducted at the end of the campaign.<br>Interviews with campaign designers. | Assumption: individuals are interested in road safety.<br>Risk: new evidence might be counter to standard or common practice and is met with scepticism. |
| <b>Activities</b> | Road safety sensitisation campaigns.<br>Research into the best form of road safety promotion.                                 | Number of road safety campaigns.<br>Research report published.                           | Records from road safety partner.  | Assumption: records will be accurate.  |



Keep in mind that Monitoring and Evaluation will not necessarily be in your SoW or ToR. Often, for example in a research project, it is the responsibility of the funder to monitor and evaluate (such as share the research widely or support publication). It is still a good idea though to think about how the solution you are proposing will be used and evaluated.

### 5.2.5 Explaining Who Will Benefit From Your Proposed Solution

A good problem statement explains who the problem matters to. Here, you explain who will benefit from your solution. This could include groups such as women, children and the youth, people living with vulnerability, decision-makers, or a variety of other target groups. Make sure these beneficiaries are those you identified in your description of the problem.

When writing, start by showing how each group will benefit from the solution. Make sure these benefits align with the needs of these groups, city/area, or country, which you identified in the context section.

- Who will not be able to benefit from the solution – is anyone excluded because of cost, access to payment methods, lack of access to data or the internet, or excluded by geography, gender, or other reason?
- Who are the direct beneficiaries?
- Who are the indirect beneficiaries?
- How has gender equity been considered in the project design?
- How have the needs of vulnerable groups, such as marginalised groups and people with disabilities, been considered in the project design?
- How will you involve the various potential beneficiaries in the project?
- Who will implement the solution?
- Who else is needed to support the solution? Which government departments, policies, agencies, or other partners or collaborations are necessary?  
How will you involve these stakeholders?

### 5.3 Method and Work Plan (Action Plan)

Every project proposal needs a method and work plan. Most RfPs include an outline of a timeframe and include milestones (approximate dates on which outputs must be delivered). No matter what, your project proposal must include your own method, in a narrative, and a work plan in a simple timeline developed using a spreadsheet, or by using fancier project planning software.

At the stage of a project proposal, develop a work plan by month. For internal project management, you might opt for a work plan by week.

A good work plan must include:

- The main project milestones (deliverables or outputs)
- Each step, in chronological order, that is needed to achieve the main milestones. These steps are likely to be similar to the activities you listed earlier
- How long will each step take
- Which steps can happen at the same time, and which can only happen once the previous step has been completed.

For internal project management, include the details of how each activity will be achieved. For example, if one activity is a workshop, then the steps to achieve this might include: mapping stakeholders, engaging stakeholders, planning the agenda, developing a list of invitees, writing the invitations, mailing the invitations, reminding invitees, ordering the catering, etc.

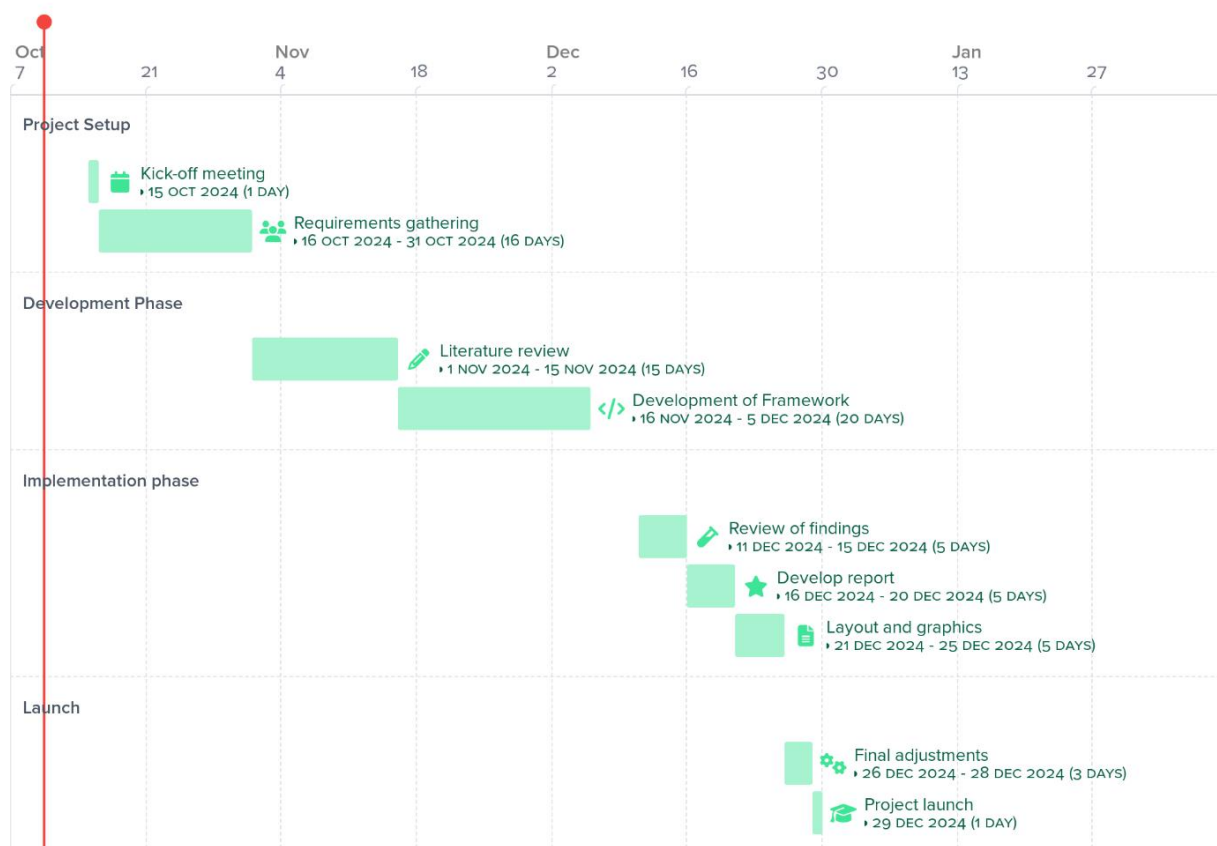


Figure 7: Example of a project timeline, using free online software at Preceden.com.

## 5.4 Project Team

This is where you explain why and how you and your team are best suited to deliver the project or assignment, whether you are responding to an RfP or developing your own.

In the proposal, include a short paragraph about each team member, giving their role, qualifications, and key skills and experience. Include the details in each individual's CV. There is usually a limit to how many pages each CV should be (often only 4 pages).



See section 'Tailoring CVs' (6.1.) for more guidance.

## 5.5 Financial Proposal

In a competitive bid (i.e., where you are responding to an RfP and competing with the proposals of others), you will usually be asked to send the budget in a separate document to the rest of your proposal – sometimes even in a separate email. Sometimes funders ask for the entire financial proposal to be sent separately.

A financial proposal includes:

- A budget
- A narrative, explaining your competitive advantage and value for money
- Payment or invoice schedule
- A risk assessment
- An operational plan (not always needed for a project proposal)

### 5.5.1 Budget

A budget is a cost estimate, but it is one that you will have to stick to (i.e., if your estimate is under-budget, you are unlikely to be able to ask for a budget increase at a later stage). The budget should include all the relevant and legitimate direct and indirect costs: staff salaries, travel, equipment, materials, overheads, taxes (such as research licences), and contingencies.

Decide on the pricing method, such as fixed price, an hourly rate, or a deliverables-based fee. Justify your budget and pricing with a clear breakdown and analysis.

You could also include a payment or invoice schedule, noting that a certain percentage of the cost should be paid at the start of the project (inception), another percentage once key outputs are delivered (key milestones), and the final fee at the end of project (project close-out). In a formal RfP, the funder will usually indicate the payment schedule.

In the narrative or ‘value for money’ section, you could explain, for example, that you have included highly experienced team members at a high hourly rate, but only for a few hours/days – they will mentor and guide less experienced team members. You could also note, in another example, that you will be drawing on your knowledge and experience in the field of work, and therefore do not need to allocate many hours to understanding the context. This is also where you would describe any contributions that will be made by participants or local communities, such as volunteers, or donations of equipment and materials for example. Mention co-funding – if you have access to other donors, for example.

You will find an example of a budget template under ‘Appendices’.

### 5.5.2 Risk Assessment

Every project proposal does require a risk assessment. Ask yourself:

- What are the risks or challenges that your proposed project or research could face, at each stage?
- How likely is it that these risks or challenges will occur?
- What can you do to prevent these risks or challenges from occurring?
- If these risks occur, how severe will the impact be?
- What can you do to manage these risks or challenges if they do occur?

Below is an example drawn from a household travel survey, and provides an indication of the type of risks and the level of details a project proposal is expected to include.

Table 2: Example of a risk assessment from a household travel survey.

| <b>Key challenge or risk</b>   | <b>Likelihood</b><br>Highly likely,<br>Likely,<br>Unlikely,<br>Highly unlikely | <b>Mitigation and action</b>   | <b>Severity</b><br>Minor,<br>Major,<br>Catastrophic |
|--|--|--|---|
| The size of the dataset.   | L  | Our team statistician is experienced in working with large datasets.<br><br>Among other actions, we will break up the dataset into areas and analyse it thus. Further, our statistical software has a tool that particularly assists with large datasets.  | Major   |
| Faulty GPS locations.  | L  | Quality checks to verify location accuracy.  | Minor   |
| Data quality concerns.   | HL   | We have built in extensive data quality checks into our programme.<br><br>The data collection instruments will be pre-tested (to test not only the design of the instruments but the data collection skills of the fieldworkers.<br><br>A sample of the surveys will be back-checked, and each will be checked for errors and invalid coding, etc. | Catastrophic  |
| Short project time-frames.<br><br>Data loss (theft of devices).            | HL<br><br>HI   | The use of hand-held data capture devices with immediate upload to the cloud reduces the need for time-consuming data-capture and mitigates concerns with data-loss through theft of devices, for example.   | Major   |
| Fieldworkers are refused access to study sites.                            | HI   | We will obtain City support in terms of the orientation, consultation and communication process with stakeholders.<br><br>Correct identification documentation of fieldworkers.<br><br>Availability of the city official/s for verification.   | Major   |
| Delays through weather, transport disruption, etc.                         | HI   | Possible delays will be built into the time-schedule.  | Minor   |
| Review and approval processes are delayed with resulting project slippage. | HL   | Rigorous status reporting and project management.  | Minor   |

Table 3: A simple table for a risk assessment.

| Risk or challenge | Description | Probability<br>Likely,<br>unlikely, | Severity<br>Minor, major,<br>catastrophic | Actions to<br>minimise risk | Actions to<br>mitigate risk |
|-------------------|-------------|-------------------------------------|---|-----------------------------|-----------------------------|
| Internal risks    |             |                                     |   |                             |                             |
|                   |             |                                     |   |                             |                             |
|                   |             |                                     |   |                             |                             |
| External risks    |             |                                     |   |                             |                             |
|                   |             |                                     |   |                             |                             |
|                   |             |                                     |   |                             |                             |

### 5.5.3 Operational Plan

An operational plan is more complex than a work plan and financial proposal. It builds on the workplan, though, and allocates team members (or resources), costs, expenses, funding sources, and other support, to each activity or step on the work plan.

Ask yourself:

- What resources are needed for each step or activity (this could include team members, finances, technology, equipment, a venue, etc)
- What resources are needed for each step or activity (e.g. human resources, funding, technology)?
- Where you expect to obtain these resources. Will any of the project steps generate revenue?
- What percentage of the total budget will be spent to achieve each output or milestone?



You seldom need to include an operational plan at project proposal stage, but it is a useful concept to have in mind while developing a budget and financial proposal. Often operational plans serve as internal project management tools.



## 6 Responding to a Request for Proposals

This section of the Toolkit builds on chapter 5, ‘Key elements of a good project proposal’, and now focuses on specific requirements in a competitive or formal RfP.

An RfP usually explains how responses or proposals will be scored or evaluated. For example, evaluation criteria could simply be:

- 50% for relevant experience
- 20% for understanding the assignment
- 30% for cost.

More complex RfPs have more complex scoring; they might break down scores into points for higher degrees, for regional experience, for local service providers, or for language skills, for example.

When writing your proposal, give each section the proportionate amount of attention; for example, if an RfP asks that you are fluent in four relevant languages, but only gives 1% of the score to ‘language’, don’t be put off if you are only fluent in two languages. If 20% of the score is for experience and 60% for understanding the assignment, focus your attention on describing your understanding of the assignment.

### 6.1 Tailoring CVs: Scoring Experience

An RfP usually sets out the specific human resources or personnel needed for a project, such as a:

- Team leader
- Finance expert
- Gender expert
- Transport engineer.

The tasks, skills, experience, and qualifications of each expert or the team leader will be listed in the RfP. The exact scoring for each is usually given, such as in this example for a transport planner:

- Five years of professional experience in each of the following areas:
- Working with bi-lateral development banks (3 points out of 10)
- Costings for a variety of public transport options (2 points out of 10)
- Public transport solutions that address climate mitigation (4 points out of 10)
- Capacity development for city officials (1 point out of 10)
- Regional experience: 2 years

So, pay careful attention to the scoring, and highlight the skills and experience to align with the scoring. Using the example above, make sure that the CV for the transport planner focuses on climate mitigation solutions and on experience with development banks rather than focusing on capacity development.

If the tasks of the team leader include ‘ensuring high quality, paying attention to monitoring processes, and regular reporting’, make sure that the CV of the team leader highlights their experience in these areas.

Some RfPs specify the style of CV.



The [Europass](#) is a common style of CV



The [World Bank](#) has a particular style of CV (including guidance)

## 6.2 ‘Understanding the Assignment’

Often at least half of the points used to score a proposal are for ‘understanding the assignment’ or ‘understanding the ToR’. It can be tempting to repeat what is written in the RfP itself, but this is an opportunity to show what your team brings to the project:

- Draw on your understanding of causal pathways (Theory of Change), and root causes, to show that you understand why the funder has asked for this proposal and the intended impact;
- Restate or paraphrase the ToR in your own words to reveal your engagement with the RfP and depth of understanding;
- Include a few additional research references that support the ToR;
- Note, in brief, lessons learned from similar work that supports the ToR;
- Explain how you intend to carry out the assignment, in greater detail stated in the RfP (your method and implementation plan).

## 6.3 Cost or Price Schedule

A number of RfPs specify the number of ‘expert days’, an overall budget, and the number of flights or travel days. Keep to these price schedules without deviating.

You will find an example of a budget template under ‘Appendices’.

## 6.4 Other Possible Scoring Criteria or Proposal Requirements

A number of RfPs ask for the following elements in a proposal:

Gender equity

- How has or how will gender equity be considered?

Vulnerable groups

- How has or how will vulnerable groups be considered?

Sustainability

- How will results of the project be maintained in the long term? For example, through developing local skills or mainstreaming the project within government structures.
- What socio-political factors are essential for the sustainability of your project beyond its proposed lifecycle? To what extent are these factors in place?
- What is required for the project to have financial sustainability beyond its proposed lifecycle? To what extent are these factors in place?
- What is required for the project to have institutional sustainability (for example, governance, organisational or administrative institutions) beyond its proposed lifecycle? To what extent are these factors in place?
- At what scale is your project intended to take place (at neighbourhood, local, city, national, regional scale, for example)? Is it possible to for it to be ‘upscaled’ – in other words, implemented at a greater scale? What would need to happen for this to take place?
- How will you communicate the project’s progress and outcomes?

Learning and innovation

- How will you share knowledge?

Capacity development and local engagement

- How will capacity development be undertaken in your work?

Project management and operational plan

- An operational plan builds on a workplan, and allocates team members (or resources), costs, expenses, funding sources, and other support, to each activity or step on the work plan.

Backstopping strategy

- Who will provide technical, financial, and management support to the project?

## 7 Checking and Formatting Your Proposal

### 7.1 Grammar and Proofreading

Nothing is better than a professional editor and proofreader, but there are a few good online and AI tools for assistance too.

Try these free tools:

- <https://www.grammarly.com> Grammarly checks for plagiarism and generates citations (references) as well as offering writing and editing assistance.
- <https://lex.page> offers writing and editing assistance and also enables real-time collaboration on a document.
- <https://quillbot.com> is able to paraphrase, check grammar, check for plagiarism, and assist in citations and references.



The [Plain Language Association](#) is a good resource for guidance in what makes writing easy to understand.



### 7.2 Typeface

Sometimes an RfP will tell you what typeface, type size, and margin size to use. If not, choose the most simple and common typeface instead of something that stands out or attracts attention. Avoid elaborate heading styles or numbering.

Use 11-13 pt type size, with single or 1.5 line spacing. The text in this Toolkit is single spacing, with 6 pt spacing before and after each paragraph. The typeface is Corbel, 12 pt. The margins are set to 'normal'.

### 7.3 Graphics

This Toolkit includes graphics showing templates, timelines, and infographics. These have been adapted from different sources and applications to share ideas about online resources. In your project proposal, choose one style or 'look' and use it throughout, rather than the variety used here.

### 7.4 Captions

Always caption photographs, tables, figures or other graphics. Use automated numbering.

Include the copyright and source in the caption.

Before saving and pressing 'send', update all numbers in case you have added or deleted captions. To double-check, select your entire document (not only the contents lists), and update all fields. Then return to the contents and tables of figures and the numbering should be correct.

## 7.5 File Names

An RfP might include information about how to name your files before delivering them, and in what format (open files or pdf, for example).

If not, always include identifying information, status of the document, as well as the date. For example:

- GIZ\_project\_proposal\_toolkit\_final\_October\_2024.pdf;
- Tender\_no\_123850\_JenningsG.doc;
- Pitch\_presentation\_CapeTown\_GIZ\_March\_2024\_Group3\_pdf.

## 7.6 Page Numbers, Headers and Footers

Sometimes an RfP will include information about anonymity in a document. If not, always include identifying information in the footer of the document, as well as the page number. You could simply use or expand the same information as the file name, such as:

- Presentation of proposal for transport information hub, developed by TeamSix, Cape Town March 2024. Document status: Pitch. Not for distribution or citation.

## 7.7 Document Types

An RfP might ask for the technical proposal to be in pdf or word file, and the budget to be in a spreadsheet.

If you are using MS Word, there are at least three ways to save a document as a pdf file.

- File>save as
- Share>send pdf
- Print>pdf

Do not assume that the pdf will be identical to your word file. Always check that hyperlinks still work and that the formatting has not changed. Experiment with different ways to save to check which one works. For example, sometimes 'save as' keeps hyperlinks but loses formatting; 'print pdf' sometimes keeps formatting but loses hyperlinks.

## 7.8 Number of Pages

An RfP might specify how many pages your proposal must be (often ten pages). Do not exceed this. This page count usually excludes CVs and samples of work.

## 7.9 Referencing

A professional editor or proofreader will also check referencing styles, but there are a few good online and AI tools for referencing too.

Try these free tools:

- <https://www.zotero.org>
- <https://www.mendeley.com>

## 7.10 Attribution and Plagiarism

Plagiarism is taking someone else's writing, ideas, or work, and presenting these as if they were your own. This includes:

- Using definitions from a website without referencing or attributing the website source
- Cutting and pasting from one proposal into another
- Using the exact words from a report or article but without putting them in quotation marks – **even if you add the source.**

Poor referencing is not necessarily plagiarism, but it is bad practice and diminishes your work. For example, if you cite statistics or data in a proposal's problem statement, always indicate the source.

Always recognise the work of others: if you include 'authorship' in a proposal – in other words, if you include details of who the proposal was developed by – give credit where credit is due. Include the names of colleagues who contributed to proposal ideas, concepts, research, writing, or revision.

## 8 Appendices

### 8.1 Checklist: Contents Outline for a Concept Note

#### 8.1.1 Introduction

A concept note is an outline of your proposed project, and must at least include an introduction, background, objectives, intended results, and budget overview. When writing your concept note, keep it to four pages at most (you will find that some funders or donors ask for a maximum of two pages). This template offers a guideline for writing a more detailed concept note for your proposed project; it might look like a lot of information to put in only four pages, but each item needs only a sentence or two. You will be able to put all the details into your full project proposal, but it's important to show that you have considered all these elements. When you get to your full proposal, you will also need to spend more time explaining your method (how exactly you will implement the project).

#### 8.1.2 Context and Problem Statement

- Briefly describe the **context or setting** for your proposed solution. Depending on the proposed project, this could include facts and figures such as road fatality numbers, emissions data, poverty data, information about the growth in motorisation, the cost of public transport, details about the regulatory environment, modal splits, university curricula for engineers, etc.
- What is the specific problem that this contextual data reveals?
- What are the immediate implications or impacts of this problem?
- What will be the implications or impact if this problem is not overcome in the long term?
- What evidence is there that solving this problem is worth the investment?
- How have other organisations, projects, programmes or policies tried to overcome the problem?
- What are the underlying issues contributing to the problem? What factors shape this problem? Social economic factors? Political? Regulatory? Institutional? Social? Technical capacity? Other?

### 8.1.3 The Solution

- What is your proposed solution to the problem?
- Explain step-by-step how your proposed project / solution to the above problem will work
- Will your solution address any of the root causes to the problem?
- What progress has already been made to address the problem?
- How is your solution different to the solutions others have tried? What gap is your solution going to fill?
- How will it build on or complement the solutions others have tried?
- Why is your proposed solution particularly relevant or appropriate to the country or city context?
- How does your proposed solution support or align with the goals or objectives of the country/city?

### 8.1.4 Beneficiaries, Partners, and Stakeholders

- Who will benefit from your solution? This could include groups such as women, children and the youth, people living with vulnerability, decision-makers, or a variety of other target groups. Make sure these beneficiaries are those you identified in your description of the problem, above. Be as specific as possible in your description.
- How will each group benefit from the solution? Make sure these benefits align with the needs of these groups, city/area, or country, which you identified in the context section, above.
- Who will not be able to benefit from the solution – is anyone excluded because of cost, access to payment methods, lack of access to data or the internet, or excluded by geography, gender, or other reason?
- How will you involve the various potential beneficiaries in the project?
- Who will implement the solution?
- Who else is needed to support the solution? Which government departments, policies, agencies, or other partners or collaborations are necessary? How will you involve these stakeholders?

### 8.1.5 Team

- Who is part of your team?
- What is each of their roles?
- What is their relevant education and experience?
- What makes each team member the right person for their role in your proposed project?



### 8.1.6 Results Framework

- What are your assumptions about the context, root causes, and other factors, that are essential to the project succeeding? (For example, assumptions that there is political will for your project, or that there is interest from beneficiaries)
- Impact: What is the main expected change that your proposed project will bring about ('before' and 'after'), in the long term?
- Impact: Do you expect a different change for different target groups or beneficiaries?
- Outcomes: What are the more immediate or shorter- to medium-term changes your proposed project will bring about (depending on the length of your project, this could be within a few weeks or months)? List and number these outcomes, ensuring that at least one outcome focuses on behaviour change (short-term) and one on system change (medium-term)
- Indicators: How will you measure this change (in other words, how will you know this change has taken place?). Propose an indicator for each outcome you have listed. Check that these indicators are achievable.
- Activities: what activities need to happen to achieve the outcomes? List the activities for each outcome (verbs could include 'organise', 'develop', 'support', 'host', 'write').

### 8.1.7 Implementation Roadmap and Budget

How will your proposed project be implemented? To answer this in your concept note, draw up a table that shows the following:

- The main project milestones
- Each step, in chronological order, that is needed to achieve the milestone
- How long will each step take
- Which steps can happen at the same time, and which can only happen once the previous step has been completed?
- What resources are needed for each step (this could include team members, finances, technology, equipment, a venue, etc.)?
- What resources are needed for each phase (e.g., human resources, funding, technology)?
- Where you expect to obtain these resources. Will any of the project steps generate revenue?
- What % of the total budget will be spent to achieve each milestone?

### **8.1.8 Risk Assessment**

- What are the risks or challenges that your proposed project could face, at each project stage?
- How likely is it that these risks or challenges will occur?
- What can you do to prevent these risks or challenges from occurring?
- What can you do to manage these risks or challenges if they do occur?

### **8.1.9 Sustainability Measures**

- What socio-political factors are essential for the sustainability of your project beyond its proposed lifecycle? To what extent are these factors in place?
- What is required for the project to have financial sustainability beyond its proposed lifecycle? To what extent are these factors in place?
- What is required for the project to have institutional sustainability (for example, governance, organisational or administrative institutions) beyond its proposed lifecycle? To what extent are these factors in place?
- At what scale is your project intended to take place (at neighbourhood, local, city, national, regional scale, for example)? Is it possible for it to be ‘upscaled’ – in other words, implemented at a greater scale? What would need to happen for this to take place?
- How will you communicate the project’s progress and outcomes?

## 8.2 Checklist: Contents Outline for a Research Proposal

An application to conduct research includes similar elements to those of a project proposal, but also includes additional details such as sample size, sampling methods, and a section about ethics.

These are the main content sections that an Institutional Research Board (IRB) application will require:

- Names of investigators and their qualifications
- Affiliations (universities to which researchers are attached or affiliated)
- A review of the literature and other similar studies
- A problem statement or justification of the need for the research
- Specific objectives of the research
  - Research questions
- A description of the study design and how data will be collected
  - Study sites
  - Study participants
  - Study period
  - Sampling methods
  - Sampling sizes
  - Types of data collection instruments
  - Informed consent forms and risk mitigation
  - Details about transcription and translation of data
  - Data management methods
  - Data analysis method
- Research dissemination strategy
- Publication ethics
- A workplan and deliverables
- Fieldwork plan
- Local partnership details
- Budget and budget justification
- Bibliography
- Appendices
  - Actual data collection instruments, such as survey questions and focus group questions)

### 8.3 Downloadable Work Plan Templates

The following website – [www.tools4dev.org](http://www.tools4dev.org) – provides templates for developing workplans as well as other strategies and plans. Templates are free for download.

| <b>Work Plan by Month Template</b><br><small>www.tools4dev.org</small> |             |             |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
|--|-------------|-------------|--------|---|---|---|---|---|---|---|---|----|----|----|--------|---|---|---|---|---|---|---|---|----|----|----|
| Task   | Responsible | Status      | Year 1 |   |   |   |   |   |   |   |   |    |    |    | Year 2 |   |   |   |   |   |   |   |   |    |    |    |
|  |             |             | 1      | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 1      | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| <b>Baseline survey</b>   |             |             |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| <b>Workstream name</b>   |             |             |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| <b>Workstream name</b>   |             |             |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |
| Task   | Insert      | Not started |        |   |   |   |   |   |   |   |   |    |    |    |        |   |   |   |   |   |   |   |   |    |    |    |

### 8.4 Downloadable Budget Templates

The following website – [www.tools4dev.org](http://www.tools4dev.org) – provides templates for developing budgets as other strategies and plans. Templates are free for download.

|                                 |                        | <b>Budget Template</b><br><small>www.tools4dev.org</small> |           |           |                  |
|---------------------------------|------------------------|--|-----------|-----------|------------------|
| Item                            | Units                  | Quantity   | Frequency | Unit Cost | Total Cost       |
| <b>Personnel</b>                |                        |  |           |           |                  |
| Program Manager                 | number / months        | 1  | 24        | \$ 1,000  | \$ 24,000        |
| Trainers                        | number / months        | 3  | 10        | \$ 500    | \$ 15,000        |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |
| <b>Subtotal</b>                 |                        |  |           |           | <b>\$ 39,000</b> |
| <b>Equipment &amp; Vehicles</b> |                        |  |           |           |                  |
| Desktop computers               | computers              | 3  | 1         | \$ 1,300  | \$ 3,900         |
| Motorbikes                      | motorbikes             | 2  | 1         | \$ 2,000  | \$ 4,000         |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |
| <b>Subtotal</b>                 |                        |  |           |           | <b>\$ 7,900</b>  |
| <b>Activities</b>               |                        |  |           |           |                  |
| Lunch for training sessions     | participants / days    | 300  | 5         | \$ 5      | \$ 7,500         |
| Printing training manuals       | participants / manuals | 300  | 3         | \$ 6      | \$ 5,400         |
|                                 |                        |  |           |           | \$ -             |
|                                 |                        |  |           |           | \$ -             |

## Project Proposals That Work: From Concept to Action

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