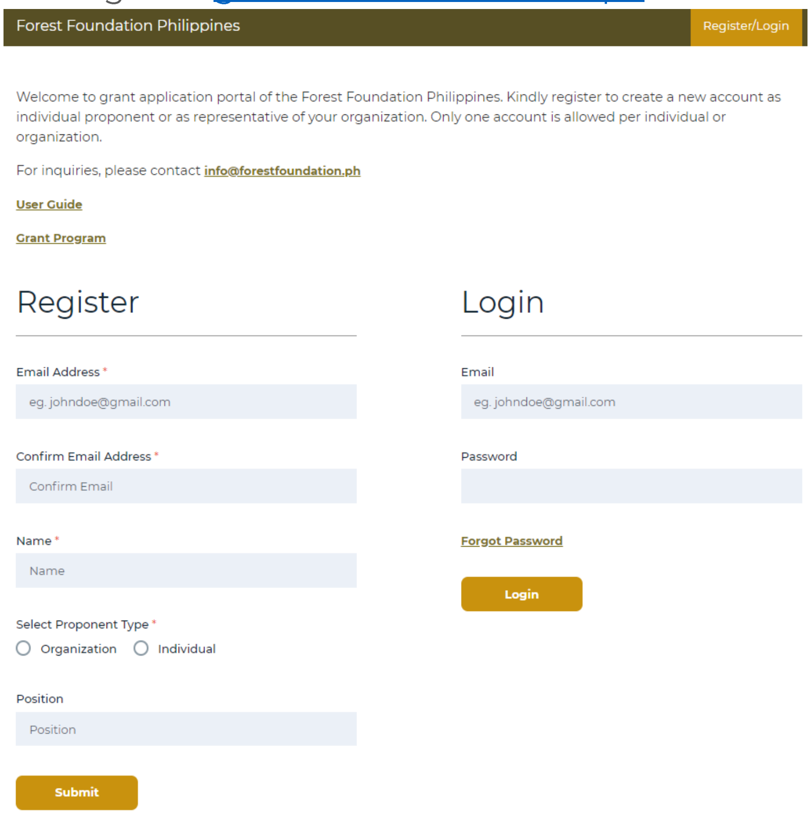
Project Proposal System
Proponent User Guide

Version 2.0 | August 2019

A. Quick Start Guide

- Upgrade your browser to the latest version to get the best experience using the system.
- Users can only access the system by creating a User Account. Register and login on grants.forestfoundation.ph.

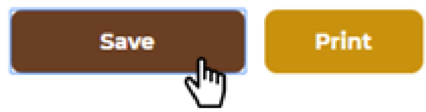


- After registering, you will receive an email with a verification link. Please allow 5-10 minutes for this message to arrive. If you do not receive the notification in your Inbox folder, please check your Spam folder.
- Users must enter the following required details in their proponent profile before creating a proposal:
    - Mailing Address
    - Mobile Number
    - Website
    - At least one (1) past or on-going project
    - At least one (1) reference
- Users who will submit proposals on behalf of their organization need to have the registration details issued by the Securities and Exchange Commission, Cooperative Development Authority, Department of

Labor and Employment or other appropriate government agency on hand.

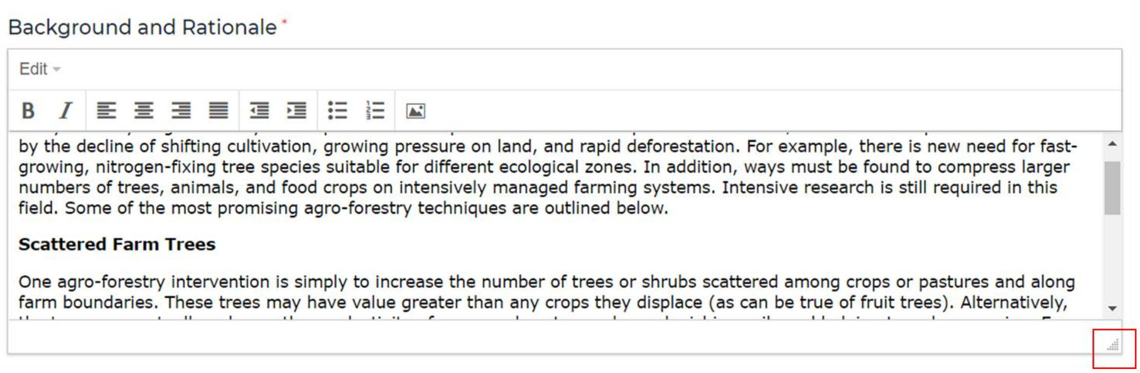
- Ensure that your proponent profile is updated when submitting proposals. Any missing or incomplete entries will delay the proposal evaluation process.
- Fill in required fields that are marked with a red asterisk. You will be prompted to complete any blank required fields before proceeding to the next section.

- Remember to frequently save your work by clicking the Save Button that appears at the top and bottom of the page.

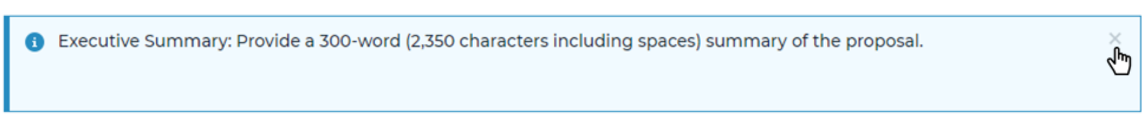


- A notification will appear at the bottom right corner of the page to confirm that your entries were successfully saved.

- You can resize text areas by clicking and dragging the lower right corner.



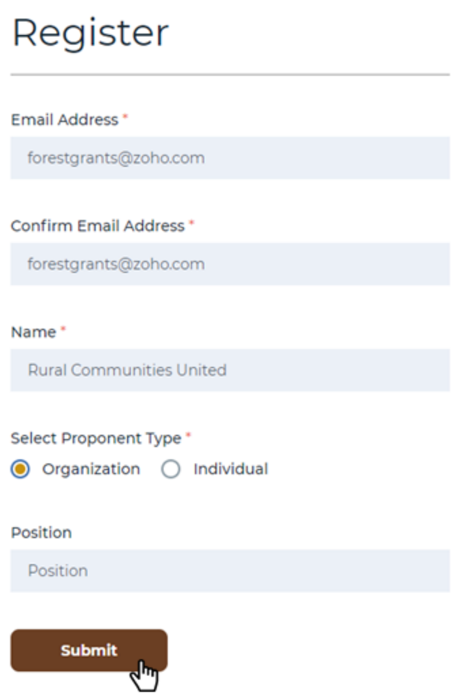
- Hide the help text by clicking the close button in the top right corner of the box.



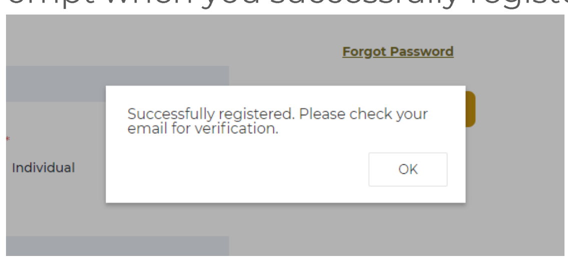
- Please contact us at info@forestfoundation.ph should you require further assistance.

B. How do I create an account?

- Complete the registration form on grants.forestfoundation.ph
- Complete the registration form and click "Submit."
    - Email Address – Enter a valid email address as you will need to validate your account by email before logging in.
    - Name – Enter your name or your organization's name
    - Proponent Type – Select "Organization" if you are submitting a proposal on behalf of your organization. Otherwise, select "Individual."
    - Position – Enter your designation if you are registering as an Individual.

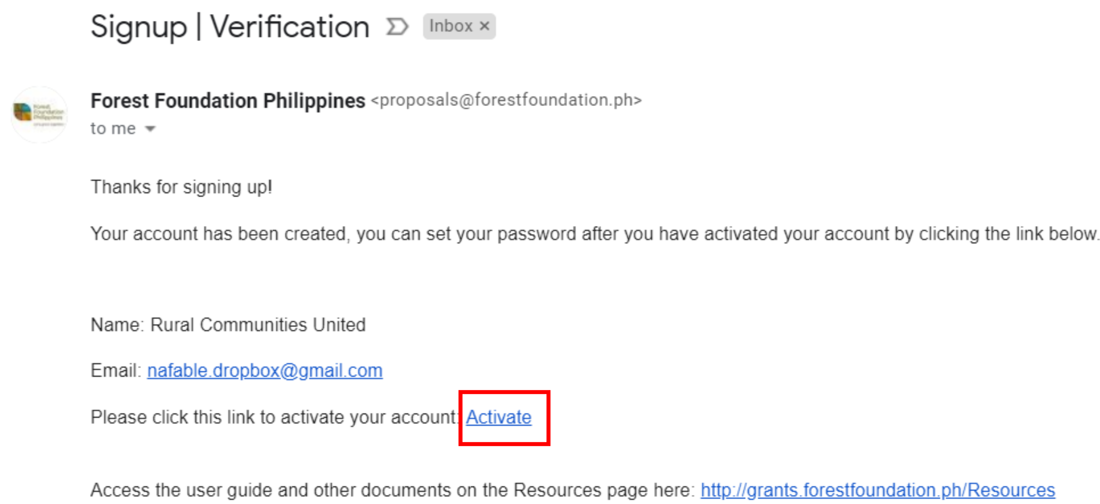


- You will see this prompt when you successfully register your details.

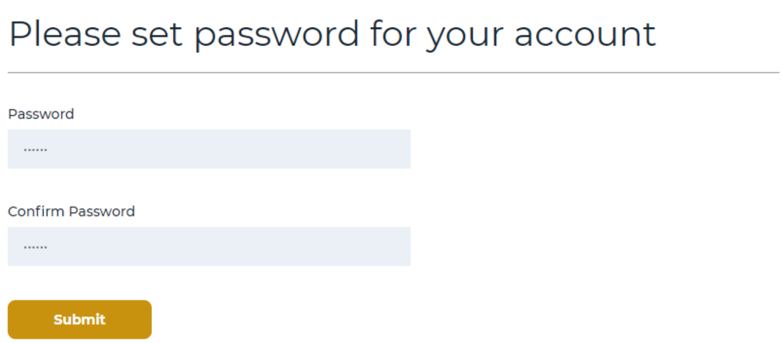


- You will receive a message with the subject line: "Signup | Verification" from "proposals@forestfoundation.ph" in your registered email address. Open the email and click the link to activate your account. If you do not receive the notification in your Inbox folder, please check the Spam folder.

- Click "Activate."



- After you click the link to activate your account, you will be required to set your password. Please enter the same password in both text areas.



- You will then need to complete your account profile.

C. How do I complete my proponent profile?

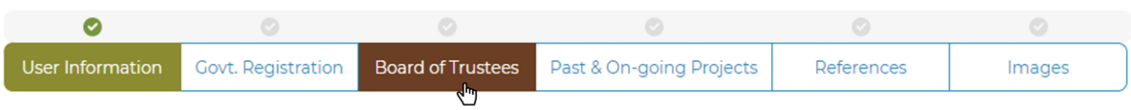
1. Access "My Account"

- Click your account name that appears in the top left corner of any page to access your profile page.

- Your proponent profile depends on your selected proponent type. Compared to Individuals, Organizations are required to submit more information that includes government registration and details of their Board of Trustees.
- You can change your proponent type at any time from your "My Account" page.

2. Organization Proponent Type

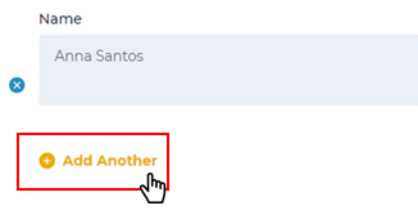
- The progress tracker that appears at the top of the "My Account" page will guide you in completing your profile. Click the section name to transfer from one section to another.



- A small green check will appear above the section name when you complete all the required fields.

2.1. User Information

- Please complete the following **required** fields:
  - Mailing Address – enter your complete mailing address where official documents will be sent.
  - Mobile Number
  - Website
- Under Project Team, please click the "Add Another" button when you want to another member.



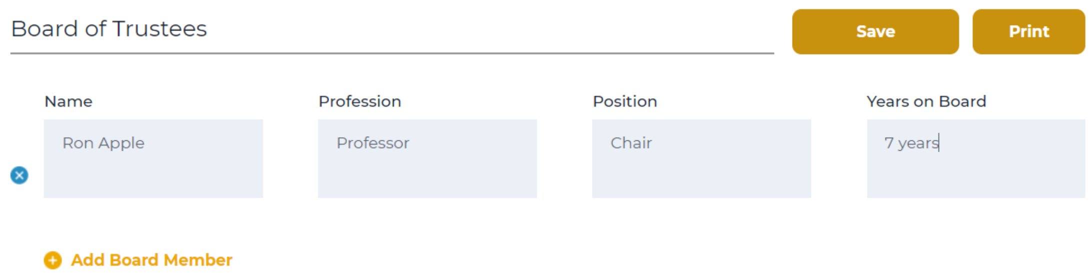
- To delete an entry, click the cancel button that appears on the left side of the row. Undo feature is not applicable once deleted.

2.2 Government Registration

- Users who will submit proposals on behalf of their organization need to provide at least one (1) registration number and date issued by the Securities and Exchange Commission, Cooperative Development Authority, Department of Labor and Employment or other appropriate government agency.

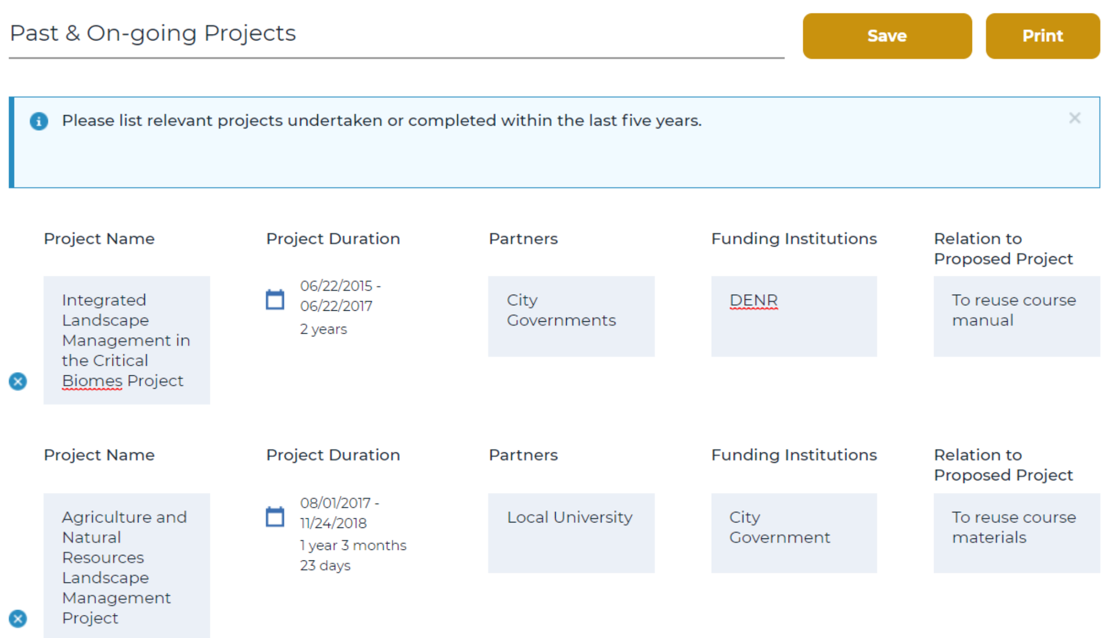
2.3. Board of Trustees

- If your organization has a Board of Trustees, Directors, or similar recognized group of people who jointly oversee activities, provide their name, profession, position and years on the board.
- Otherwise, leave this section blank.

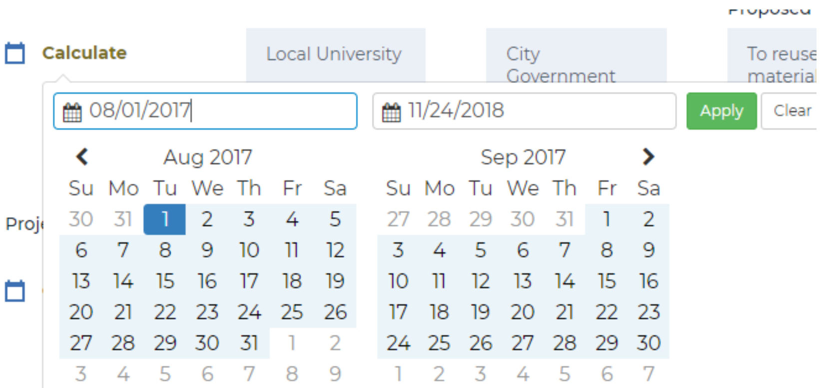


2.4. Past and On-going Projects

- Proponents are **required** to enter at least one (1) past or on-going project before creating a proposal.
- List the following details of relevant projects undertaken or completed within the last five years.



- Click “Calculate” and enter the start and end date of the project. You can also enter the date into the two text boxes. The system will automatically generate the project duration when you click “Apply.”



- Briefly describe how the previous or current project is related to the proposed project in one to two sentences.

2.5. References

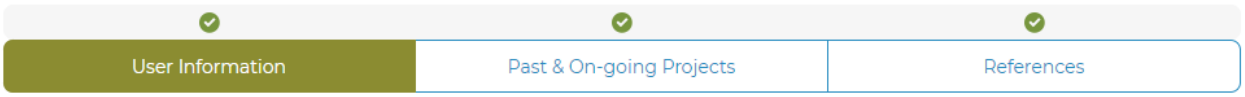
- Proponents are **required** to enter at least one (1) reference before creating a proposal.
- Enter at least three references, which can include former and current partners, clients, vendors and donors, and their contact number and e-mail address.

2.6. Images

- Upload the logo of your organization in the following image file type formats: png, jpg, gif. Consider resizing your logo as the maximum limit of the image file is 1 megabyte (MB).

- You can only upload one (1) image file.

3. Individual Proponent Type

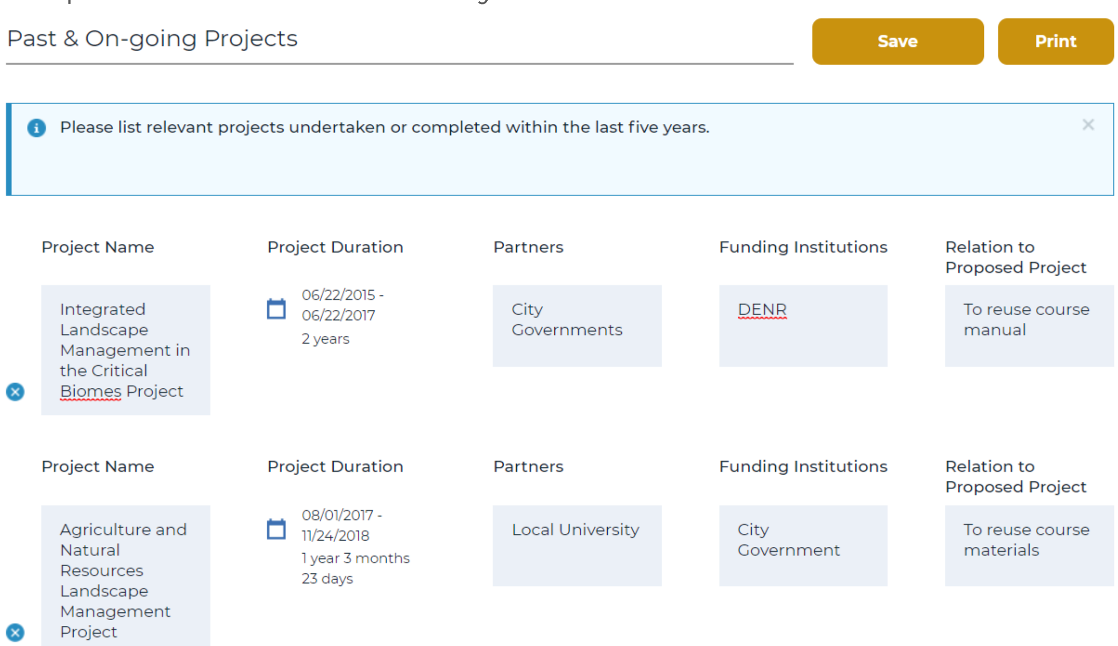


3.1. User Information

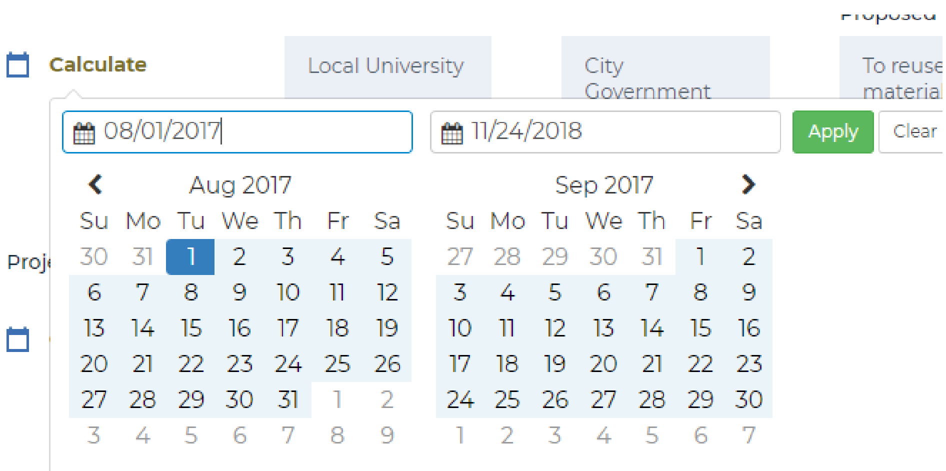
- Please complete the following required fields:
  - Mailing Address – enter your complete mailing address where official documents will be sent
  - Mobile Number
  - Website

3.2. Past and On-going Projects

- List and provide the following details of relevant projects undertaken or completed within the last five years.



- Click "Calculate" and enter the start and end date of the project. You can also enter the date into the two text boxes. The system will automatically generate the project duration when you click "Apply."



- Briefly describe how the previous or current project is related to the proposed project in one to two sentences.

3.3. References

- Provide at least three references, which can include former and current colleagues, collaborators, clients, vendors and donors you have worked with, and their contact number and e-mail address.

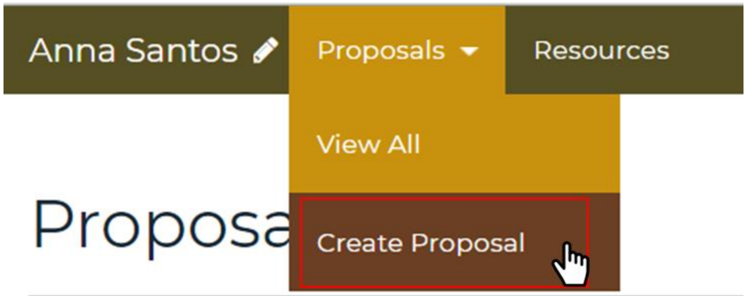
4. Print Proponent Profile

- Click “Print” to generate a PDF copy of your proponent profile that will open in a new tab.

- This PDF file will be included as one of the linked documents of your proposal submissions.
- Please ensure that your proponent profile is updated when you submit proposals. Any missing or incomplete entries will delay the proposal evaluation process.

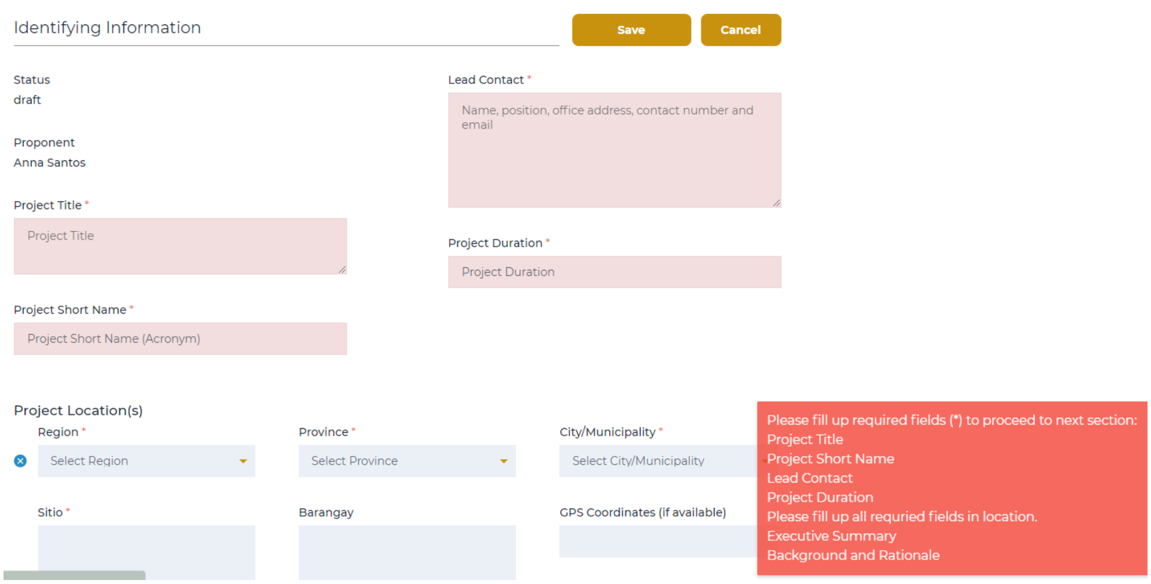
D. How do I create and submit a proposal?

- After completing the proponent profile, users can start drafting proposals. Hover on “Proposals” and click “Create New.”



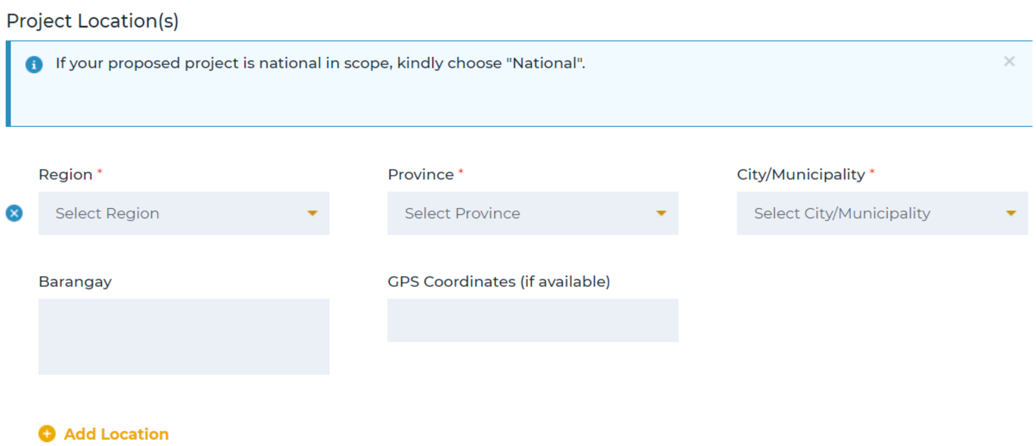
- The proposal template is divided into six sections.

- Unlike the proponent profile, you must fill up required fields (*) to proceed to the next section. The blank required fields will be highlighted in red and listed in a prompt if you click “Previous” or “Next” buttons without completing all the required fields.



1. Identifying Information

- Please complete the following required fields:
    - Project Title
    - Project Short Name
    - Lead Contact – Enter the name, position, office address, contact number and email of the lead contact who should receive any communication from the Foundation.
    - Project Duration
    - Project Location – First, select the region of your project site. The province then city/municipality dropdowns will only display areas located in the selected region and province respectively.



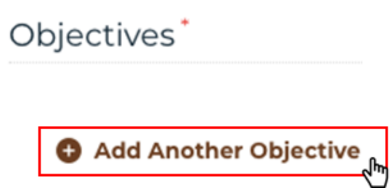
        - For projects with multiple locations, please click "Add Location."
        - If your proposed project is national in scope, kindly choose "National".
    - **Executive Summary** - Provide a 300-word (2,350 characters including spaces) summary of the proposal.
    - **Background and Rationale** - Provide the following information, if applicable:
        1. Brief problem statement – this may include analysis of the local situation, threats to the forest, perceived needs of forest and forest dependent communities. Relevance of the proposed project to the objectives;
        2. Identify the target groups, with an estimate of the anticipated number of direct beneficiaries;
        3. Include justification for the selection of the target groups

4. Relevance of the proposed project to the overall program/plan/priorities of the national government, LGU, protected area, ancestral domain, community or sites as identified by conservation groups;
5. Relevance of the proposed project to the respective management plans (e.g. CRMF of CBFMA area, Protected Area management plan, ADSDPP/CDP of ancestral domain, and/or CLUP/FLUP of the municipality), if applicable;
6. Interface of the project with the land-use zones (e.g. protection zone, production zone, multiple-use zone);

- For mangrove management project, provide information on, and status of the site (e.g. abandoned fishponds, seaward or landward areas with existing mangroves, existing naturally growing mangrove species, tenure, and substrate (coralline, sandy, muddy);
- For research project, this should include a thorough review of the literature, statement of the problem, and potential innovative applications of knowledge.

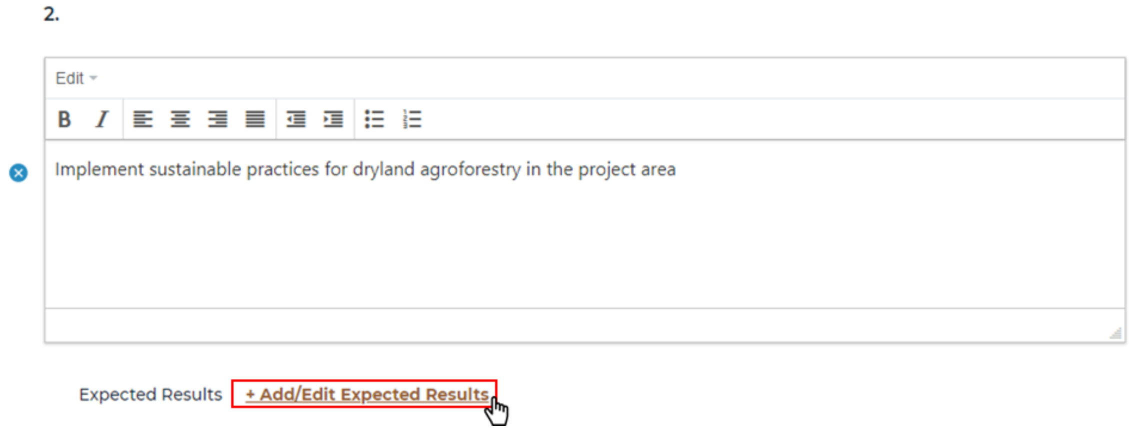
2. Objective and Expected Results

- Please complete the following required fields:
    - **Overall Project Goal** - Describe the overall project goal, which shall be consistent with the aim of the Forest Foundation Philippines' Request for Proposals and/or Results Framework; and
    - **Objectives** – Identify specific objectives that will help achieve the overall goal of the project. Specific objectives should be simple, measurable, achievable, realistic, and time-bound (SMART).
        - Click "Add Another Objective" to add an Objective.



    - **Expected Result** - Provide the expected results/deliverables for each objective. Please be specific and quantify outputs as much as possible. (e.g: # of hectares to be managed, # of seedlings to be produced, # of household/families to benefit from project interventions).

- Click “Add/Edit Expected Results” under the selected Objective.



Example of Overall Project Goal, Objectives and Expected Results

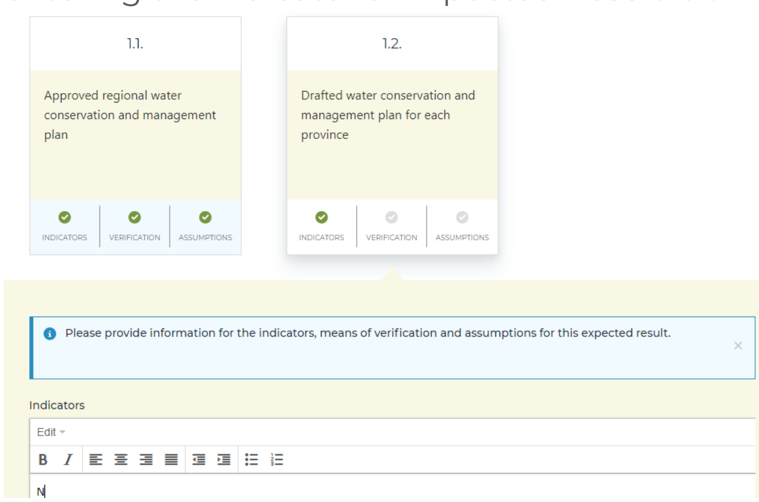
- Overall Project Goal: The project aims to sustainably manage the peatland forest of Leyte Sab-a Basin. Specifically, the project objectives are as follows:
    - Objective 1. Protect, conserve and rehabilitate 180 hectares of remnant peat swamp forest;
        - Expected Result 1.1. 180 hectares of peatland assessed
        - Expected Result 1.2. 180 hectares of peatland forest delineated for protection
    - Objective 2. Reverse CARPed areas within the 1,106 hectares Leyte Sab-a Basin Peatland area to forestland status
        - Expected Result 2.1 Assessed the status of the CARPed areas within the 1,106 hectares peatland forest

3. Strategies to Achieve Results

- **Methods/General Plan of Action** (required)
    - For each of the specific objective, describe the general plan of action to be employed to achieve the desired project results. Provide information how the project or the specific objective

intends to build on a previous or current project/activities implemented in the area (e.g. DENR NGP, BFAR PNAP, LGU projects and other projects funded by development partners, where applicable).
    - Proposed projects with assessment, research and mapping components should cite relevant framework/methods/standards to be used.
    - Proposed projects that aim for reforestation/restoration should provide information on the silvicultural techniques (e.g. Assisted Natural Regeneration, rainforestation, etc.), nursery operation strategy, seed sources, and species to propagate. Indicate the scientific names.
    - Proposed project strategies within ancestral domain should be consistent with the Indigenous Political Structure
    - Proposed project with livelihood component should be consistent with the Sustainable Livelihood Assessment Framework of United Kingdom Department of International Development (http://www.glopp.ch/B7/en/multimedia/B7_1_pdf2.pdf)
    - For research project, include here the study design, study population/sampling, data collection methods and instruments as well as data analysis methods.
- **Project Team Composition**
    - Provide the project organizational structure and/or team composition proposed for implementation of the project. The Project Team is comprised of individuals directly employed by the proponent, with full-time project engagement. Describe or list the specific tasks of each position.
    - Thorough planning of the project team composition and cost claims is encouraged, as this will be subject to evaluation and approval of the Foundation. Once the project team composition is approved, it will be the structure to be respected during project implementation. Should any changes be necessary, a formal communication should be submitted for consideration and approval of the Foundation.

- **External Project Staff**
    - Provide the "external project staff," e.g. consultants, experts, interim personnel etc., that will be employed in the first year of the project. For external staff, indicate the Expected Result Number and the means of selection (e.g. through a call for tender).
- **List of Partner Organization/Agencies**
    - If applicable, list the partner organizations or agencies taking part, as well as the level of engagement. Actions must clearly describe how participation of beneficiaries, mandated forest management institutions and organizations (e.g., DENR, LGUs, local communities) will be engaged.
- **Monitoring and Evaluation Framework** (required)
    - Provide information and strategies how the partner communities, LGUs and government institutions will be involved in the M&E process.
    - Fill out the cards below or provide a project framework/diagram as prescribed by your organization.
    - Please note that the M&E framework proposed herein may be subject to change after approval and discussion.
- **Project Monitoring and Evaluation Framework** (required)
    - Click each card to enter or edit indicators, means of verification and assumptions for each expected result.
    - The selected card can be distinguished through the shadow effect and light green arrow. In the example below, the user is entering the indicator of Expected Result 1.2.

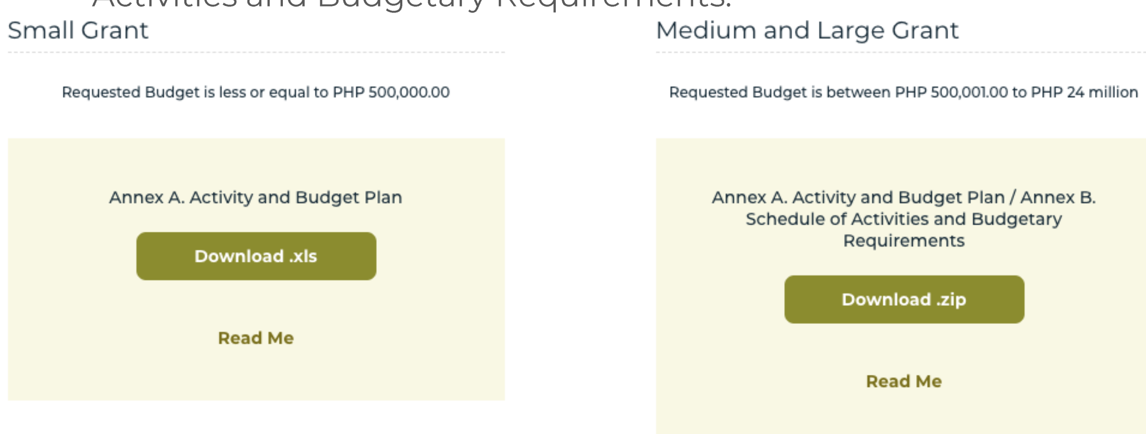


- A green check appears when each field is completed.

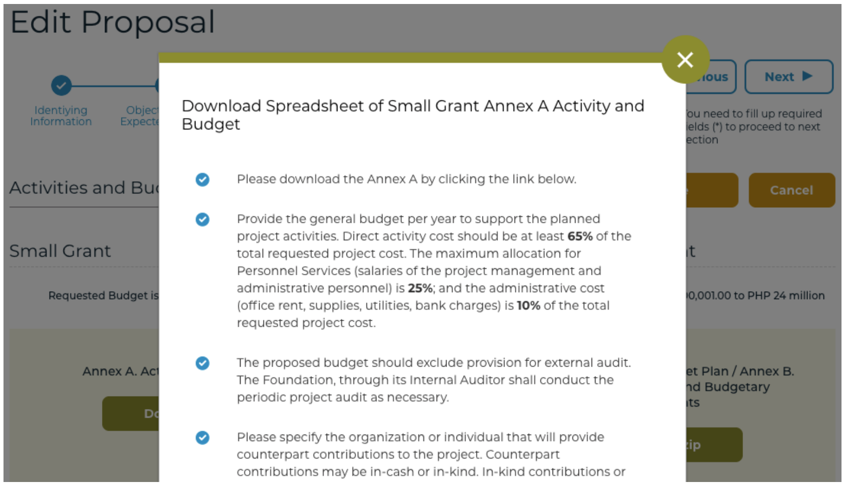
- **Sustainability Plan** (required)
    - Provide information on the sustainability of the proposed actions (where applicable), with considerations on the following aspects of sustainability:
        - Financial sustainability - How will the action(s) be financed after the Forest Foundation Philippines grant support?
        - Institutional sustainability - Will there be ownership of the project outcomes? What would be the role of the LGU and other mandated agencies, as well as the community(ies), after the project ends?
        - Structural sustainability - Will the project contribute to the overall improvement of the methods/management systems of the forests in the area?
    - For research project, provide details on how to assure quality of study, data handling, and other ethical considerations.

4. Activities and Budget

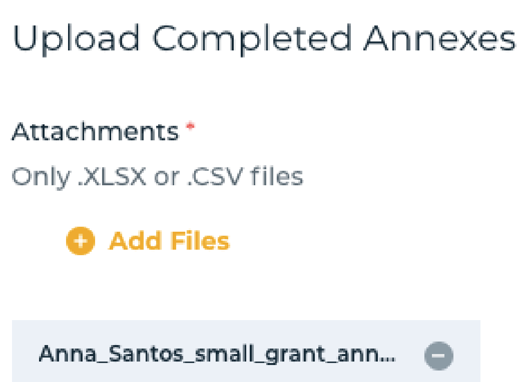
- **Activities and Budget**
    - Click “Download .xls” to download the Annex A. Activity and Budget excel file if the requested budget of the proposed budget is less or equal to PHP 500,000.00.
    - Click “Download .zip” to download the zip file that contains both Annex A. Activity and Budget Plan / Annex B. Schedule of Activities and Budgetary Requirements.



- Carefully read the instructions to complete the annexes. The guidelines can also be accessed by clicking “Read Me” or within the Excel files.



- **Upload Completed Annexes**
    - After you complete the annexes up, click “Add Files” and select the file from your file browser. You can only upload the following file types: .xlsx, .xls and .csv.
    - You may add identifying information to the file name but please <u>retain the original file name of the annexes</u> (small_grant_annex, Annex A. Med-Large_Activity and budget plan, Annex B. Med-Large_Timeframe and budgetary requirements).
    - The successfully uploaded files will be listed under the “Add Files” button.



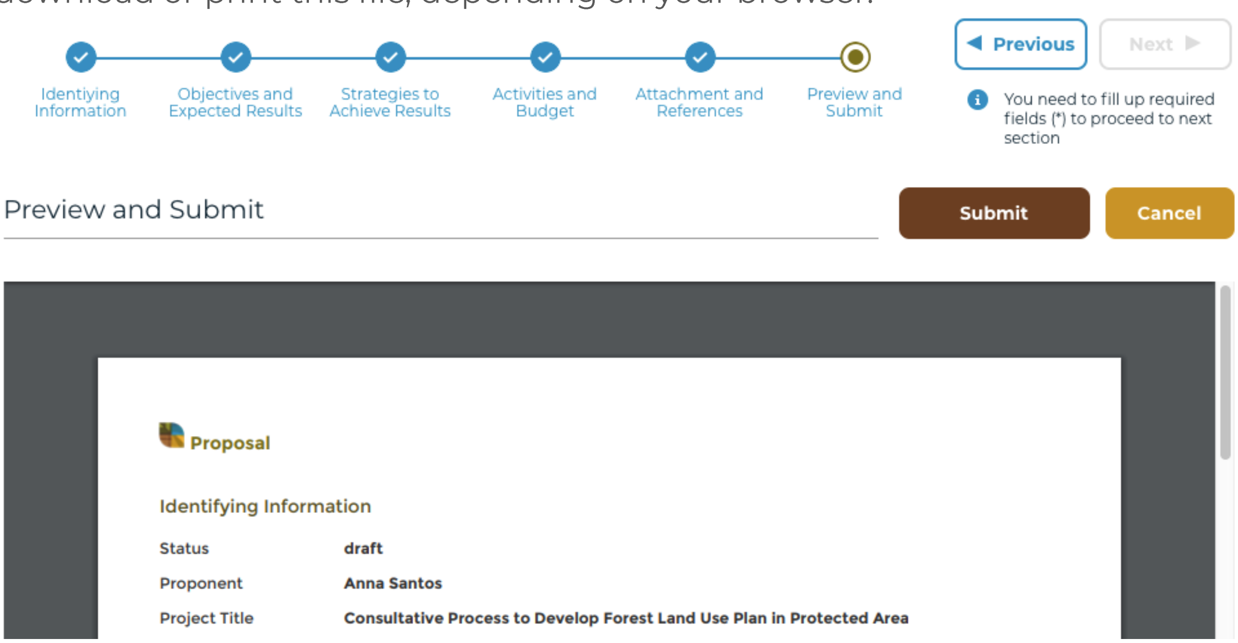
- **Budget**
    - Enter the total “Requested Budget” and “Counterpart Fund” based on your uploaded annexes.
    - You can only enter numbers in these fields.
    - The system will calculate the “Total Project Cost” based on the entered amounts.

5. Attachment and References

- Attachments
  - Attach all other supporting documents, including maps, endorsements, copies of management plans, etc. that will be submitted together with this proposal.
- Link to Shared File/Folder
  - If the documents are larger than the size limit or not allowable file types, consider uploading these files in folders in external file hosting services like Dropbox or Google Drive.
  - Ensure that Foundation staff members or anyone who has the link can view or access these files and enter the link to the shared folder here.
- References (required)
  - List references or literature cited in the proposal.
- How did you find out the Foundations Request for Proposal? (required)

6. Preview and Submit

- A PDF copy of your proposal will be generated in this section. You can download or print this file, depending on your browser.



- Please review your proposal before clicking submit. A notification will appear at the bottom right corner of the page to confirm that your proposal was successfully submitted.

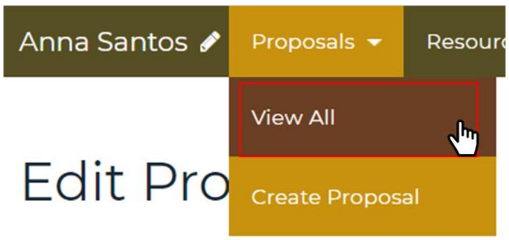
- You will be redirected to the view mode of your proposal, with its status updated to submitted.

- You will also receive an email with the subject line: “Submission Confirmation” from “proposals@forestfoundation.ph” after the successful submission of your proposal.

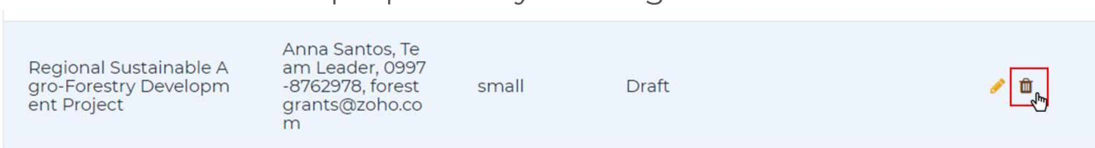
E. How do I check the status of my proposal?

- Click “Back to proposal list” after successfully submitting a proposal.

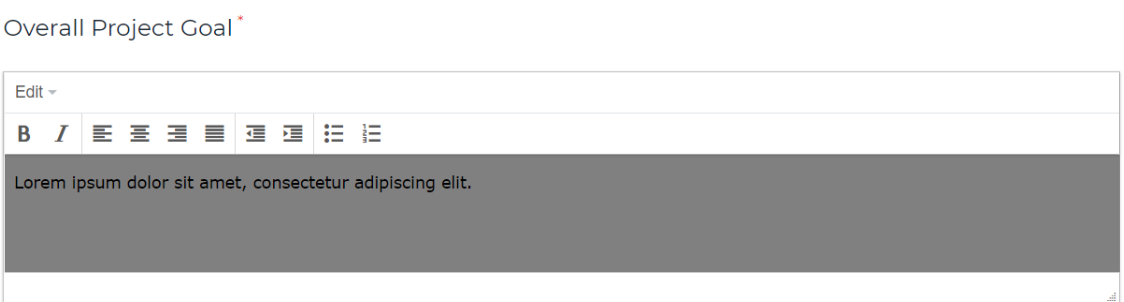
- The proposal list can also be accessed through“Proposals” > “View All.”



- The statuses of your proposals are displayed in your Proposal Dashboard.
- You can delete draft proposals by clicking the delete icon.



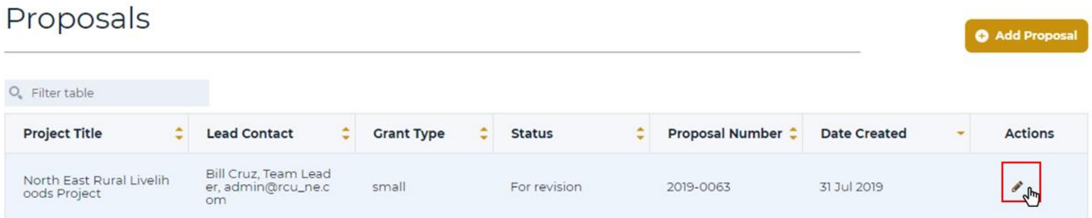
- You can also click the edit icon of submitted proposals to revisit your submission. However, you will be unable to edit the content as the text areas will be disabled.



- Your registered email address will also receive notifications when the status of your proposal is updated.

F. How do I edit a proposal?

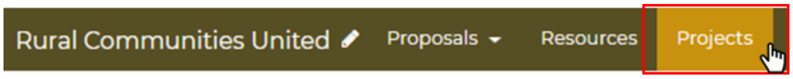
- You can edit proposals with the status “draft” or “for revision.” Click the edit icon that appears beside a proposal.



- You will then be able to edit all text areas. Click “Submit” when you are ready to resubmit your revised proposal. Your registered email address will then receive another submission confirmation.

G. How do I access the project page of my approved proposal?

- After you receive an email that your proposal has been approved, you can access the project page of your grant. Click “Projects” in the navigation bar.



- Click “View” of the selected grant in the Active Projects table.

Active Projects

Filter table

Grant #	Project Title	Lead Contact	Requested Amount (Php)	Start Date	End Date	Action
2019-0001	North East Rural Livelihoods Project	Bill Cruz, Team Leader, admin@rcu_ne.com	487,000.00	01 Aug 2019	30 Aug 2020	View

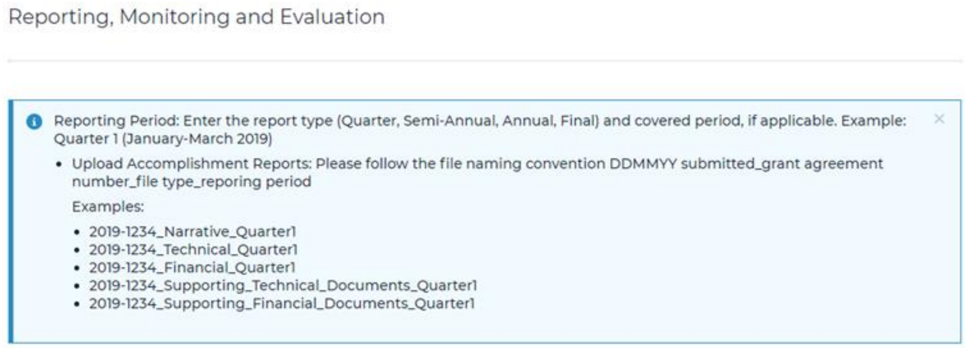
FIRST PREV 1 NEXT LAST

- The project page has three sections. Click the section name to transfer from one section to another.

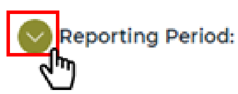
- The Project Details section contains your submitted proposal documents and the following files related to your grant:
  - Grant Agreement Number
  - Project Timeframe
  - Grant Agreement and Annual Workplan – includes the grant agreement that outlines details that include the grant terms, payment schedule and reporting requirements as well as approved annual workplans.
  - Financial Questionnaire and Audit Report – includes results and attachments of audits conducted by the Foundation as well as the completed financial questionnaire that you may have submitted as part of the proposal.
  - Tranche Details – includes deposit slips of tranches as well as official letters such the notice to proceed.
- Click the filename to download the document. Alternatively, click “(download all)” to download a .zip file of all files under the selected subsection.

H. How do I submit an accomplishment report?

- Please be guided by the reporting requirements and due dates specified in your grant agreement.
- Go to the “Reporting, Monitoring and Evaluation” section of the Project Page.
- Click “Add Report” to create a Reporting Period subsection.



- Click this button to expand the subsection.



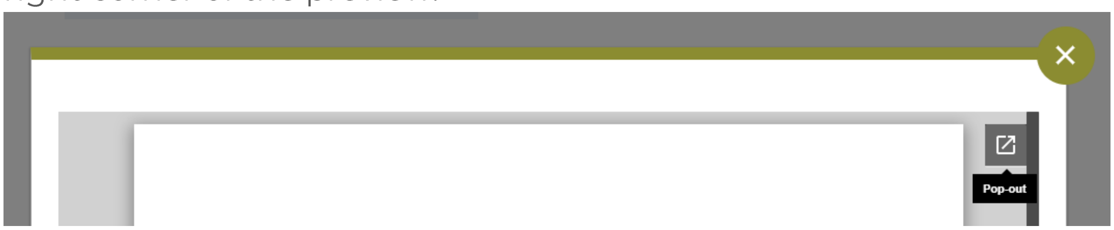
- Reporting Period
  - Enter the report type (Quarter, Semi-Annual, Annual, Final) and covered period, if applicable. Example: Quarter 1 (January-March 2019)
- Accomplishment Reports
  - Click “Upload Narrative/Technical/Financial” and select the file from your file browser. You can only upload the following file types: .doc, .docx .xls, .xlsx and .pdf
  - Please follow the file naming convention: grant agreement number_file type_reporting period
    - Examples: 2019-1234_Narrative_Quarter1; 2019-1234_Technical_Quarter1; 2019-1234_Financial_Quarter1
- Attachments
  - Click “Upload Attachments” and select the file from your file browser. You can only upload the following file types: .doc, .docx .xls, .xlsx and .pdf

- Please follow the file naming convention: grant agreement number_file type_reporting period
  - Examples: 2019-1234_ Supporting_Technical_Documents_Quarter1; 2019-1234_Supporting_Financial_Documents_Quarter1
- Link to Shared File/Folder
  - If the documents are larger than the size limit or not allowable file types, consider uploading these files in folders in external file hosting services like Dropbox or Google Drive.
  - Ensure that Foundation staff members or anyone who has the link can view or access these files and enter the link to the shared folder here.
- The successfully uploaded files will be listed under the upload button. The system will automatically prepend the date and time that the file was uploaded. Click the file name to preview the document.

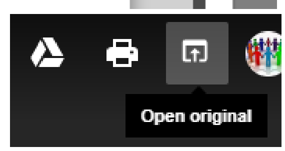
- You can delete an uploaded file by clicking the delete icon on the right of the file name.

I. How do I view and respond to the evaluations of my report?

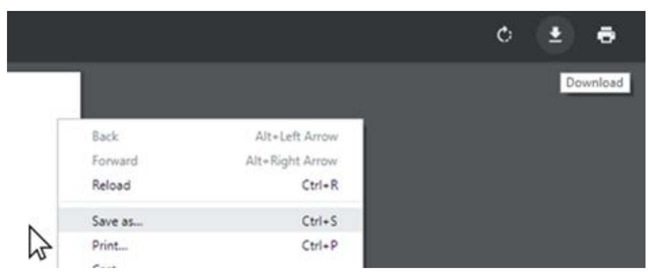
- Technical and Financial Evaluation from Forest Foundation Philippines
    - Foundation staff will be notified as soon as you upload files under a reporting period.
    - Your assigned project officer will upload his or her evaluation in the "Technical Evaluation from Forest Foundation Philippines."
    - Similarly, a member of the finance unit will upload his or her evaluation in the "Financial Evaluation from Forest Foundation Philippines."
    - Click the file name of the evaluation to preview the document.
- To download the files, click the Pop-out button that appears in the top right corner of the preview.



- The file will then open in a Google Docs viewer. Click "Open Original" that appears in the top right corner of the page.



- You can then click Download if your browser has the Adobe Acrobat Reader plug-in or right-click the document then select "Save As".



- Response to Technical and Financial Evaluation
    - Upload files to address concerns raised in the technical and financial evaluations in their respective fields.
    - Similarly, Foundation staff will be notified as soon as you upload a response.

J. How do I submit requests to amend specific grant details?

- Details that include the budget alignments or closing date may need to be amended during the project duration. Please discuss these concerns with your assigned project officer before uploading your request.
- After the discussion, prepare a letter addressed to the Executive Director of the Forest Foundation Philippines. Go to the “Requests” section of the Project Page when you are ready to submit your request.
- Letter for Realignment and/or extension
    - Upload the letter as a DOC, DOCX XLS, XLSX and PDF file.
- Attachments
    - Upload supporting documents such as the realigned budget as a DOC, DOCX XLS, XLSX and PDF file.
- Foundation staff will be notified as soon as you upload the request and any attachments and will contact you about your request. The Foundation’s official response will be uploaded under “Response from Forest Foundation Philippines.”

For questions, please send an email to info@forestfoundation.ph