Writing Winning Proposals
Session 8

September 12, 2007

Hussein Amery
Integrated Development Enterprise Associates
Workshop Overview

The workshop is designed to identify key elements of effective bidding and providing advice in preparing winning International Financial Institution (IFI) Proposals.
Workshop Overview

- The Bidding Cycle
- Pre-qualification selection criteria
- Getting Short-listed
- Getting Ready to Bid
- Writing winning proposals
International Competitive Bidding and Public Procurement
The Multilateral Development Banks (MDBs)

Asian Development Bank (ADB)
- Location: Manila
- Regional, resident offices
- Member Country: 62
- Borrowing Members: 41
- Canadians on Staff: 46
- Canadian Participation: voting power: 4.6%
- permanent seat on 12-member Board
- www.adb.org

Inter-American Development Bank (IDB)
- Location: Washington
- Member Country: 46
- Borrowing Members: 26
- Canadians on Staff: 25
- Canadian Participation: voting power: 4%
- permanent seat on 14-member Board
- www.iadb.org

World Bank (WB)
- Location: Washington
- 109 Regional, field, liaison offices
- Member Country: 184
- Borrowing Members: 142
- Canadians on Staff: 218
- Canadian Participation: voting power: 3.05%
- 5th place with 5 others permanent seat on 24-member Board
- www.worldbank.org

African Development Bank (AfDB)
- Location: Tunis
- 7 regional offices, one in London
- Member Country: 77
- Borrowing Members: 53
- Canadians on Staff: 9
- Canadian Participation: voting power: 3.3%
- permanent seat on 24-member Board
- www.afdb.org

Caribbean Development Bank (CDB)
- Location: Barbados
- Member Country: 25
- Borrowing Members: 17
- Canadians on Staff: 1
- Canadian Participation: voting power: 9.5%
- permanent seat on 24 member Board
- www.caribank.org

European Bank for Reconstruction and Development (EBRD)
- Location: London
- 32 regional offices
- Member Country: 60
- Borrowing Members: 27
- Canadians on Staff: 1
- Canadian Participation: voting power: 3.4%
- permanent seat on 23-member Board
- www.ebrd.com
ICB = International Competitive Bidding (ICB)

- IFIs generally operate under the principle of International Competitive Bidding (ICB)
- ICB makes the bidding process open [principally] to respective member countries
- Opportunities for non-competitive service delivery is generally restricted to smaller [less than $50,000]
Four Main Types of Procurement

- Procurement of Services (Consulting / TA)
- Procurement of Goods & Equipment
- Procurement of Civil Works
- Procurement of Information Technology
Know the Process: The (World Bank) Project Cycle

1. Country Assistance Strategy
   The Bank prepares lending and advisory services, based on the selectivity framework and areas of comparative advantage, targeted to country poverty reduction efforts.

2. Identification
   Projects are identified that support strategies and that are financially, economically, socially, and environmentally sound. Development strategies are analyzed.

3. Preparation
   The Bank provides policy and project advice along with financial assistance. Clients conduct studies and prepare final project documentation.

4. Appraisal
   The Bank assesses the economic, technical, institutional, financial, environmental, and social aspects of the project. The project appraisal document and draft legal documents are prepared.

5. Negotiations and Board Approval
   The Bank and borrower agree on loan or credit agreement and the project is presented to the Board for approval.

6. Implementation and Supervision
   The Borrower implements the project. The Bank ensures that the loan proceeds are used for the loan purposes with due regard for economy, efficiency, and effectiveness.

7. Implementation and Completion
   The Implementation Completion Report is prepared to evaluate the performance of both the Bank and the borrower.

8. Evaluation
   The Bank’s independent Operations Evaluation Department prepares an audit report and evaluates the project. Analysis is used for future project design.

See Page X in workbook for more information
Resource Documents Released During WB Project Preparation

- Identification
- Preparation
- Appraisal
- Negotiations/Approval

- Monthly Operational Summary
- Project Information Document
- Staff Appraisal Report
- Technical Data Sheet

(MOS) Entry (PID) (SAR) (TDS)
<table>
<thead>
<tr>
<th>Project Cycle</th>
<th>What Type of Opportunity?</th>
<th>Who?</th>
<th>How to Find out More? (what information is publicly available)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identification</td>
<td>Short-term, individual</td>
<td>WB/ADB</td>
<td>MOS</td>
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<tr>
<td>Preparation</td>
<td>Short-term, individual and competitive</td>
<td>WB/ADB and Borrower</td>
<td>MOS, PID</td>
</tr>
<tr>
<td>Appraisal</td>
<td>Short-term, individual</td>
<td>WB/ADB</td>
<td>PAD/SAR, Project Proposals</td>
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<tr>
<td>Negotiation</td>
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<td>WBIADB and Borrower</td>
<td>GPN</td>
</tr>
<tr>
<td>Implementation and Supervision</td>
<td>Competitive (&gt;US$ 200K) and short-term individual</td>
<td>Borrower</td>
<td>SPN/RFP, TDS</td>
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<tr>
<td>Evaluation</td>
<td>Short-term, Individual</td>
<td>WB/ADB</td>
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World Bank Opportunities

Consulting Services - Types of Assignments

- **Preinvestment studies**: investigations which normally precede decisions to go forward with specific projects.
- **Preparation services**: technical, economic, or other work required to define a project and prepare it for implementation.
- **Implementation services**: construction supervision and project management.
- **Technical assistance**: wide range of advisory and borrower support services.
World Bank Requests for Expressions of Interest

- Requests for Expressions of Interest for consultants hired directly by the World Bank for its operational work* are now published on eConsult as well as in UN Development Business and the Development Gateway.

- eConsult is a web-based solution that supports task teams in the selection of consultants for operational work.

- This site now allows consultants unregistered access to its advertised notices. Consultants who want to express interest for the assignments can do so by using this system.

- This policy applies to the procurement of consulting firms when the estimated contract amount is above US$ 50,000.

ADB Opportunities for Consultants

- Pre-investment studies
- Detailed engineering and design
- Project implementation
Selection Procedures

Two basic types of selection procedures:

- those that rely solely on an evaluation of the technical competence of the firm, the personnel and the suitability of its proposal (QBS)
- those that involve both a technical evaluation and consideration of the offered price of the services (QCBS)
Technical Evaluation with Price Considerations

Consulting assignments can be broadly classified in terms of certain characteristics:

- complexity of the assignment;
- assignment’s impact on the end product; and
- probability that the proposals submitted by the invited firms will lead to comparable outputs.
Technical Evaluation

Three principal categories:

- the firm's general experience in the field of the assignment;
- the adequacy of the proposed work plan and approach in responding to the TOR; and
- the qualifications and competence of the personnel proposed for the assignment.
Responses to Public Procurement Notices:

**PUBLIC NOTICES**
- General Procurement Notice (GPN)
- Specific Procurement Notice (SPN)
- Requests for Proposals (short-list)

**SUBMISSION**
- General Letter of Interest (LOI)
- Expression of Interest (EOI)
- Detailed Technical & Financial Proposal (RFP)
General Procurement Notice (p59)

The African Virtual University (AVU) has received a grant from the African Development Fund to finance the African Virtual University Support Project. The principal objective of this project is to strengthen the capacity of a network of institutions coordinated by the African Virtual University (AVU) to deliver and manage quality Information and Communication Technology (ICT) assisted education and training opportunities in Regional Member Countries (RMCs).

The project includes the following components: (i) Establishment of Learning Centres and Connectivity Provision at AVU Partner Institutions; (ii) Teacher Training and Development Program; (iii) Mainstreaming Gender Issues Into AVU Operations; and (iv) Project Management.

Procurement of goods will be in accordance with the Bank's Rules of Procedure for the Procurement of Goods and Works. Acquisition of the services of Consultants will follow the Bank's Rules of Procedure for the Use of Consultants. Bidding documents are expected to be available in June 2005.

Interested bidders may obtain further information, and should confirm their interest, by contacting:

The African Virtual University (AVU)
P.O. Box 25405 Nairobi, Kenya
Tel. (254) 20 271 2056
Fax (254) 20 271 2071  contact@avu.org

Page in the Workbook contains sample GPN

Hussein Amery, Integrated Development Enterprise Associates
Writing Winning Proposals
Response: General Letter of Interest

- Brief one-page letter (a mini EOI)
- Introduce firm and ‘generally’ express keen interest in project
- Ask to be put on “mailing list”
- Enclose minimal material
- Don’t rely on so-called “mailing list”; Track DB or DGmarket for Specific Procurement Notices.
Short List of Firms: EOI

- Short list should normally comprise a wide geographic spread of firms who have submitted EOI
- not more than two firms of any one nationality
- at least one firm from another developing country
- 5-6 firms shortlisted
Sample SPN:

Invitation for Bids (IFB)
Kenya
Supply and installation of Broadband Satellite (VSAT) Services and equipment for AVU ODeL centers

Project Number: PZ1-IAZ-002
IFB No. AVU/ADB/IFB/005/03

1. The African Virtual University has received a Grant from the African Development Bank toward the Multinational African Virtual University Support project and intends to apply part of the proceeds of this Grant to payments under the agreement(s) resulting from this IFB for the Supply and installation of Broadband satellite (VSAT) services and equipment for AVU ODeL Centres.

2. The African Virtual University serves as the implementing agency for the project and now invites sealed bids from eligible Bidders for the Supply and Installation of Broadband satellite (VSAT) Services and Equipment or provide Internet Services for AVU ODeL centers located in Kenya, Uganda, Tanzania, Ethiopia, Djibouti, Somalia, Zambia, Zimbabwe, Mozambique and Madagascar.

Page 60-62 in the Workbook contains sample SPNs
Response: Expression of Interest (EOI)

- Cover letter (ideally one page)
  - Convey interest and awareness of project/issues
  - State why you should be short listed
  - Intent to incorporate local experts (Identify them)
  - Ask to be short listed!

Page 63 contains a sample successful EOI
Expression of Interest – Pre-qualifications

- Accompanying 3-6 page pre-qual statement
  - Description of Firm/Corporate Profile (see page 44)
  - Project Experience - Relevant Ones; Brief Snapshots (See page 46)
  - Language capabilities (Should EOI be translated?) brochures (Keep to a minimum)
Prequalification Submissions

- **Weighted Evaluation Criteria**
  - Experience of the FIRM
    - measures if the Firm has demonstrated relevant experience with comparable projects or services
  - Key Personnel
    - measures if the Firm is capable of offering the amount and type of skill and expertise required by the project
  - Management Capability
    - measures if the Firm has the knowledge and management expertise to conduct a project of this size and scope
Prequalification Submissions

Purpose: Identify a maximum of 6 qualified suppliers to present detailed proposal

- Experience of the FIRM
- Key Personnel
- Product
- Management Capacity
- Financial Certifications

- description
- sample relevant project
- in house expertise
- alliances and associates
- understanding of project
- management techniques
- track record
- Declaration of solvency
- bank interest to issue irrevocable letter of credit (for advances over $50k)
- proof of liability insurance (if applicable)
Pre-qualification Criteria  
(Making the Short List)

- Legal Capacity \((el...
General Tips on Getting Contracts

- Learn how the funder operates
- Determine whether the goods or services your Institution offers are needed in projects financed by the funder
- Find out what opportunities are coming up
- Obtain bid documents as soon as they are available from the funder
- Read the bid documents and evaluate criteria carefully
General Tips on Getting Contracts

- Decide where your firm has the best chances of winning
- It may be helpful to employ a local representative who knows the country and the language to keep you informed
- Travel to the country and make direct contact with relevant agency officials
- Make sure your bid is priced competitively and complies strictly with all specifications and contractual conditions stipulated in the documents
- If you did not win, analyze the reasons, learn from your experience
The Request for Proposal
Request for Proposal (RFP)

- **Purpose**
  - select the best value proposal

- **Information requested:**
  - proposed personnel
  - approach or methodology
  - proposed work program
  - project management plan
  - specification of key results
  - detailed budget and cost estimates
  - agreement to financial assessment
(RFP) Contents

The Letter of Invitation
- Other short-listed firms
- QCBS (Quality Cost-Based Selection) or QBS

- Data Sheet
  - Estimated person-months / Specifications and Content

- Evaluation criteria

- Prescribed Proposal Format (Standard Forms)

- Terms of Reference

- Draft Contract and Specifications
Proposal Evaluation (Weighted Criteria)

Technical Component

- **Proposed Personnel**
  - Measures the quality of the expertise and skills offered by the consultant

- **Approach / Methodology**
  - Measures the adequacy and the reliability of the proposed means to achieve the expected results
Proposal Evaluation (Weighted Criteria)

- **Management Plan**
  - Measures the quality of the project organization and the capacity to maintain the project on schedule and under control

- **Work Program**
  - Measures the degree of understanding of the work involved and the capacity to apply the approach to the project

**Financial Component**

- **Value for Money**
  - Measures the cost of the proposed services...
Key Proposal Evaluation Criteria

*Actual criteria vary depending on nature of work, country, etc.*

**Approx. +/-**

- Qualifications/experience of team members (CVs) ….. 40 pts
- Approach and Methodology ………………………………. 40 pts
- Language Proficiency …………………………………….. 10 pts
- Local Content (use of local consultants)………………… 10 pts

100 pts
Terms of Reference

- TOR are used by the World Bank and its borrowers for three purposes:
  - to confirm agreement between the borrower, the Bank and other agencies concerned on the objectives and scope of a proposed assignment;
  - to inform the consultants to be invited of the objectives and intended scope of the work; and
  - to define the consultant’s services in the contract to be negotiated with the selected firm.
World Bank TORs

World Bank TOR contain the following:

- a precise statement of the objectives of the assignment;
- the scope and time of the required services;
- the inputs to be provided by the borrower; and
- particulars of the output (i.e. reports, drawings, etc.) required of the consulting firm.
Technical Proposal (World Bank) Standard Format and “Forms”

- Submission letter
- The Cover
- Section A – Introduction
- Section B – The Firm’s References
- Section C – Project Appreciation
- Section D – Methodology and Work Plan
Technical Proposal (World Bank) Standard Format and “Forms”

- Section E – Comments and Suggestions on TOR
- Section F – Activity (Work Schedule) and Deliverables/ Team Members Deployments
- Section G – Composition of Team and Curricula Vitae of Team Members
First Step: Deciding to Bid

- Once you have reviewed the invitation, you must state your intention to bid in the form of a letter, which is usually requested in the RFP.
- The first step is to decide whether or not you want to bid.
Overall Check List

- Eligibility: are you eligible to respond to the RFP?
- Interest: Is the RFP compatible with your interests?
- Feasibility: Is the RFP feasible?
- Capability: Are you capable of implementing the RFP?
- Competitiveness: How competitive will you be; who and how many competitors?
- Clarity: Will your proposal clearly respond to the RFP, and outline the organization’s plan, giving general and specific information required?
Internal Considerations:

- Do we have the capacity for this project?
- What is our return on investment? Is it profitable?
- Do we face a backlog already?
- Can we meet the deadline?
- Do we have the required staff available?
- Do we have the necessary financial resources?
Preparing the Proposal: Overview of the Process

1. Assign Responsibility – Prepare Matrix
2. Conduct a site visit
3. Develop and flesh out project methodology/approach
4. Prepare draft technical proposal, including initial draft financial proposal
5. Secure letters of support/agreement
6. Confirm final proposal
7. Finalize detailed financial proposal
8. Review final proposal for eligibility/selection criteria and Submit to Funder
Responsibility Matrix (see p66)

- Complex problems and proposals require teams
- Teams need to be organized to achieve success
- For proposals, rapidity is essential
- Assign tasks
  - Production, graphics, packaging, cover, logistics
  - CVs (start early)
  - Drafter(s) … proposal should have one voice
Conducting a Site Visit (Ideal)

What do you do on a site visit?
- confirm players and partnerships
- verify fit / match
- develop skeleton of your project, including methodology

What do you need to bring back to Canada?
- key proposal elements / concept
- country scenario
- local costs
Key Points: Proposal Design

- Ensure Consistency with all priorities of donors and country
- Proposal should enhance the capacity of the client to effect change
- Proposal should be realistic and competitive - within the expected budget
- Realistic and resources should be available - within the available timeframe
- Partners with specific and complementary project roles, Clarify expectations ($$)
- Includes inputs only from Bank Member countries
The Cover

- Nice packaging conveys professionalism, creativity, innovativeness
- Use quality paper, binding, lots of colour,
- Creative graphics reflecting the country or sector
Map: Focus of Work
Section B: Firm’s References

- One-two page project quals / profiles (formal requirement)
- Narrative section describing firm and introducing team via 2-3 sentence bios. (sell, sell, sell)
- This section is where you sell your qualifications. With particular focus on individual team members and results of assignment.
<table>
<thead>
<tr>
<th>Country, Name of Project</th>
<th>DACUM Process</th>
<th>Curriculum Development (Content) &amp; Instructional Design</th>
<th>Experience in Similar Geographical Area</th>
<th>Other Factors</th>
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<td>Mechanical</td>
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<td>Electricity &amp; Electronics</td>
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<td>Asia</td>
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<td>Food Processing</td>
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<td>Information Technology</td>
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<td>Project Management</td>
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<td>Other Subjects</td>
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<td>Institutional (School based)</td>
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<td>Teaching &amp; Learning Materials</td>
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<td>Textbook Development</td>
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<td>Interactive Courseware</td>
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<td>Skills Standards Testing and Certification</td>
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<td>Equipment Identification &amp; Procurement</td>
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<td>School - Industry Partnership</td>
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<td>Mobile Training</td>
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<td>Institutional (School based)</td>
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<td>Demonstrate Experience – Summary chart</td>
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Hussein Amery, Integrated Development Enterprise Associates
Writing Winning Proposals
**Demonstrate Firm’s Experience: The Project Profile (p69)**

<table>
<thead>
<tr>
<th>Key Project Data</th>
<th>Project Description</th>
<th>Personnel</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Project Name</td>
<td>- Description of Project</td>
<td>- Number of Staff</td>
</tr>
<tr>
<td>- Country</td>
<td>- Description of Services Provided</td>
<td>- Number of Person Months</td>
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<tr>
<td>- Project Location</td>
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<td>- Name of Key Staff And Functions Performed</td>
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<tr>
<td>Within Country</td>
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<td>- Name of Client/ Funder/Partner</td>
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<td>- Start Date/ Completion Date</td>
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<tr>
<td>- Reference Number</td>
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</tbody>
</table>

**Financial Data**
- Value of Services
- Fees/Services
- Reimbursables
- Procurement
- In-kind
Section C: Project Appreciation

- Is supported by statistical evidence, where appropriate
- Is supported by statements from authorities and tied to goal and purpose
- Is stated in terms of clients, funders and ultimate beneficiaries
Project Appreciation

- Focuses on development problem of reasonable dimension
- Is based on the conclusions of a needs assessment
- Does not make assumptions
Section D: Approach, Methodology and Workplan

- The guts of the proposal
- Use graphical models to illustrate your strategy and approach
- Use lots of tables (logical framework style) to lay out your methodology and workplan.
- Divide project into Activities and Tasks (as with ‘Work Breakdown Structure’, WBS.
- Summary tables, frameworks, bullet points make it easier for them to read, understand, and evaluate.
Project Work Plan

- Flows naturally from the appreciation and goal / purpose/ expected results
- Clearly describes project results and corresponding activities
- States reasons for method of delivery of packages (in terms of results)
- Describes sequence, duration and timing of activities
- Presents a reasonable scope of activities achievable within the time and funds allotted
Management Strategy & Implementation Strategy

- Clearly describes management strategy
- Describes staffing of project both in Canada, other locations, and field
- Describes roles and responsibilities of Canadian and field partners
- Describes implementation approach concerning critical conditions and risk assessment
Section E: Comments/ Suggestions on TOR

- Here’s where you demonstrate understanding of the assignment
- Make suggestions as to other objectives, results, deliverables
- Largely narrative section basically reiterating the TOR. But perhaps more clearly than they were written.
Schedule F: Activity Schedule

- Project time-table (Activity by activity)
- GANTT/Bar Chart showing timeline of project, activity by activity, dates of key deliverables
- Demonstrate Level of Effort of individual team members
- Bar Chart showing person days for each team member for each activity
- What they’re looking for here is to make sure you’re giving sufficient days to the key experienced people (and to the locals).
- You’ll have a chance to reallocate (to an extent) during negotiations, inception and implementation
Personnel Section Structure

- Provide a summary chart demonstrating team experience
- CV’s of Team Members
- Page limited. Usually 3 or 5 pages
- Separate CVs with color dividers
- Make sure they’re signed, even if by proxy
### AREAS OF SPECIALIZATION

<table>
<thead>
<tr>
<th>Experience</th>
<th>Degree Obtained</th>
</tr>
</thead>
</table>

#### Academic Training
- Ph.D.
- M.A./M.B.A./M.Sc./M.Ed.
- B.A./B.Sc./B.Comm.

#### Relevant Professional Training
- Identification, Planning, Design & Management of Programme & Projects
- Knowledge of Bangladesh Cultural, Social, and Economic Milieu
- Needs Assessment / Survey
- Agricultural Extension Services
- Industry Interface
- Policy Making / Advisory Services
- Research and Instruction
- Technology Transfer (Canadian and Overseas)
- Farm Management / Practical
- Workshops and Training Seminars
- Agriculture / Rural Credit
- Marketing
- Program / Fund Management
- Food Systems
- Equipment Procurement

<table>
<thead>
<tr>
<th>Canadian Project Director</th>
<th>Contract Management</th>
<th>Team Leader / Extension Prog</th>
<th>Appraisal / Survey</th>
<th>Marketing/Processing</th>
<th>Policy/Advisory/Post-Harvest</th>
<th>Farm Management</th>
<th>Food Systems</th>
<th>Agri-Economists/Export Expans.</th>
<th>Agri-Technology Transfer/Agri-Res.</th>
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</thead>
<tbody>
<tr>
<td>IN-CANADA PROJECT MGMT.</td>
<td>LONG TERM STAFF</td>
<td>SHORT TERM CONSULTANTS</td>
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- For each area, a checkmark indicates the level of experience and degree obtained.
Composition of Team

- Lists team members, their titles, and responsibilities in a table

- Include a team/project Organization Chart (usually not requested, but its effective)
Tram Leader

Assistant Project Director

Office

Curriculum and Learning Resources

ICT in Education

Policy & Planning

District and School Impr.

Governance, Management & Accountability

Senior Advisor Training, Qualifications

National Professional Personnel

Administration

Manager

Accountant

ICT

Driver

Assistant

Short Term Consultants

Textbook Consultant

Economy Skills Consultant

Textbook Consultant

Teacher Guide Consultant

Geography/Earth Sciences

Chief Technology Advisor

ICT Teacher Training Consultant

ICT & Teacher Guide Development

Learning Resource & Teacher Guide Development & Training in ICT Development

Project / Strategic Management

Training Planning and Management

Budgeting and Public Finance

Governance and Management Specialist

RBM Specialist

Gender & Social Equality Specialist

District Modelling Program Consultants

Various Short Term Consultants

Other Short Term Canadian Consultants
CVs of Team Members

* Use Standardized Forms provided by the Banks (see Resource Package)
* It is important to submit a competent team of experts as well as relevant, well-prepared CVs.
* Since CVs are the main vehicle for presenting the proposed personnel, they must showcase expertise of the proposed individuals.
* It is important to emphasize the complementary skills of the personnel, as this demonstrates that the Consultant considered the interdependence of the tasks to be carried out by the various experts.
Personnel and Curriculum Vitae

- Only identify personnel requested
- Identification of key personnel can be the key to a winning proposal (*up to 50% of the points!*)
- Balance between local and international consultants
- Key personnel have good mix of domestic and international experience
- In many cases, key personnel should have a strong academic background (*i.e.*, Masters degree)
CV Format

- Review the standard format and sample in the workbook (p75-82)
Assessing Proposed Personnel

- general qualifications - education and training, length of experience, type of position held, time with the firm, etc.
- adequacy of the project - suitability
- language and experience in the region - background in developing countries similar to the country in which the assignment is to be conducted and linguistic ability
Preparing the Financial Proposal
Financial Proposal

$ Separate Envelope.. Will be opened in public and only after Technical Proposals are evaluated

$ Costing proposal can be tricky. Often you have an idea of the budget or, at least, expected total person months.
Financial Proposal

$LUMP \text{ SUM CONTRACTS (QCBS)}$

$Pricing \text{ will depend much on analysis of the competition & knowledge of their rate standards}$

$Be \text{ sure to research applicable taxes. Sometimes RFP provides this info; sometimes not.}$
Financial Proposal

- Respects all funding IFI financial regulations and standard rates
- Uses unit costs based on current prices in Cdn$, US$, and local currency
- Activities scheduling well planned considering cash flow constraints
Financial Proposal

- Distinguishes project activity costs from management costs
- Reflects a proportionate balance between program and management costs
  - technical assistance, capital costs
  - training, fellowships
  - management
Financial Proposal

• Provides sufficient financial resources to manage the project activities effectively (realistic)

• Provides a financial management strategy not just a budget
Fees

- A firm may place whatever rate they choose for competition. A consultant organization should be able to prove that he/she is worth such rate. With ADB, they need proof, such as salary slip or previous contract copy for attachment.
- Failing to provide evidence can easily knock you out of competition for non compliance.
Outside Consultants

- For outside consultants (meaning not employee of the firm), the firm cannot bill social charges only overhead and fees
- The maximum multiplier is 1.5 with the ADB
Reimbursable Expenses

- Reimbursable expenses are items such as travel, per diem and other items not related to fees.
- In preparing reimbursable expenses, such as airfares, put low cost as this is reimbursable expense and therefore are not limited. Some IFI’s work on bid price reimbursables.
Per Diems

For per diems, there are 2 ways of budgeting

- You can get the prescribed per diem rate per country based on ADB regulations and submit actual receipts of your hotel bills.

- There is also a NEGOTIATED FLAT RATE PERDIEM wherein it is much lower rate but the firm will not be required to submit receipts.
For per diems, there are 2 ways of budgeting:

- There is also a NEGOTIATED FLAT RATE PERDIEM and the firm is not required to submit receipts.
Other IFI Per Diems

For ADB per diems, there are 2 ways of budgeting:

- You can get the prescribed per diem rate per country based on ADB regulations and submit actual receipts of your hotel bills.

- There is also a NEGOTIATED FLAT RATE PERDIEM wherein it is much lower rate but the firm will not be required to submit receipts.
Procurement

- Identify how your proposal meets specifications
- Identify country of origin
- Ensure source is part of member country
- Critical to build in role for local inputs
Producing and Submitting the Proposal

- Print, Sign, Signature
- Copy, mark original and copies
- Packaging
- Delivery
  - Fedex?
  - Fly someone over?
  - If its late, its doomed!
  - Get a receipt.
Tips
Writing Tips

- Present thoughts coherently and logically
- Use transitional words and phrases
- Use development terminology, avoid jargon
- Write simply, avoid long sentences
- Maintain your theme(s) throughout
- Support statements with facts
Writing Tips

- Avoid gratuitous statements (“We understand, We recognize, etc.”)
- Demonstrate your commitment, capability, in what you write
- Make your responsiveness to the RFP apparent in your ideas and language (Compliance is critical)
How to Win?

- Strategize
- Know your funder
- Practice, Practice, Practice
  - Don’t expect to win the 1st time.
  - The ratio of success is usually 1 in 5
Use Canadian Government Support Abroad

Abroad

- Offices of Liaison with International Financial Institutions (OLIFI) www.canadianembassy.org/olifi
- Canadian Executive Directors Offices within the Multilateral Development Banks (MDB)
- Canadian Trade Offices Abroad
- Canadian Trade Offices Abroad (UN Markets)
Use Canadian Government Programs at home

Project and Trade Finance
- Export Development Canada
- Canadian Commercial Corporation
- Business Development Bank of Canada

Export Strategy and Support
- PSLOs
- Trade Commissioner Service
- Virtual Trade Commissioner
- Trade Team Canada Sectors
- Canada Business Service Centres
- Team Canada Inc.