

CORPORATE SOLUTIONS SPAIN- TENSTEP SPAIN



Collaborating institution of the
Project Management Institute, Central Spain Chapter & International Development SIG

PRACTICAL SEMINAR

“How to Identify, Tender and Manage Projects for European and International Development Institutions”

Three days (24 HOURS)

Two to three hours will be devoted to Case studies, where groups of two or three participants work on real proposals and reports, acting as proposal or project management teams. **Back-up documentation in CD-ROM, with over 200 real examples of pre-qualifications, proposals, reports, administrative and project management documents will be provided in a CD-ROM, plus back-up material on the procurement procedures on all the key institutions.** Reading and Case materials will be mostly in English, with some examples in French or Spanish for the relevant institutions.

PROGRAMME

Day 1: Introduction to the Funding Institutions and Identification of Project Opportunities

Overview of Key Institutions and Programmes

- General overview of European and International Institutions financing development projects
- Project cycle management of TA and development projects
- Creation and management of a pipeline of EOIs and proposals
- Consultant Databases (World Bank DACON, EC Registers, ADB, EBRD and IDB registers, other institutions- UN agencies, sub-regional development banks, etc.)
- **Case Study:** Search procurement notices at EC, WB, ADB, IADB, EBRD, etc., websites, and review of consulting firm, individual consultant and vendor databases.

Preparation of Pre-qualifications and Expressions of Interests (EOIs)

- Consortia: consortium leader, members and subcontractors
- Mix of skills and nationalities
- The EOI and lobbying to get into short-list: tasks managers, local delegations, politicians, Spanish authorities and local consultants/subcontractors influence
- Do and don'ts during short-listing and tendering process
- Shortlist: joining competitors when allowed versus subcontracting /alliances outside original consortium
- Invitations to present Proposals: documents and timings
- **Case Study:** Drafting several real EOIs for tenders funded by the EC, WB, EBRD and other institutions.

Day 2: Preparation of Winning Proposals

Proposal Preparation and team organization

- Writing winning proposals: structure and organisation
 - The Logical Framework Matrix
 - Roles of consortium members and experts: pre-bid agreements
 - Content and length of each section, methodological guidelines
 - Team organisation and CVs
 - Appendices and support charts (schedule, etc.
 - Financial proposal: forms, what is allowed and pricing strategies
- **Case study:** Examples of proposals for projects funded by WB, IADB, EBRD, ADB and other institutions.

Presentation of proposals and contract negotiation

- Interviews and presentations with evaluation teams and committees
 - Importance of presenters' roles and dry runs of presentations
 - Contract negotiation: what is allowed and what is not
 - Communication of award and contract
- **Case study:** Presentation of a proposal sketch to an evaluation committee and negotiation of a sample contract of an EC, IDB and WB project.

Day 3: Project Management and Reporting

Project Management Concepts applied to Development Projects

- Basic concepts of Project Management: Definitions, PMBOK® of the Project Management Institute (PMI), Processes and Knowledge Areas of Projects
 - Usual methodologies, techniques and PM software used in development projects
 - Team leader: roles, problems, communications, back-up support
 - Local consultants: roles, problems, logistics, support of a project or local office
 - Interim reports and presentations: formats, documents, styles and success factors
 - Back office: roles, problems with research, time sheets, expenses, transfers, invoicing, etc
 - Project management, monitoring, financial control and reporting computer and internet tools
 - External and internal evaluation, project review and negotiation of extensions
- **Case study:** Sample inception, progress or interim, final and other reports, and practice of presentation of reports to steering committees

Presentation and Writing Skills for International Projects

- Logic in writing: inductive and deductive logic, Pyramid principle of report preparation
 - Diction and style in English (UK and American) for different institutions
 - Presentation skills: poise, style, charts and timing.
- **Case study:** Drafting sections of scheduling, conclusions and lessons learnt of a real report; making presentations in groups to a simulated steering committee.

***** Please request information at madrid@corpsolutions.net *****