PARTNERS IN PROSPERITY
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PS: *This document replaces all previous versions, if any.

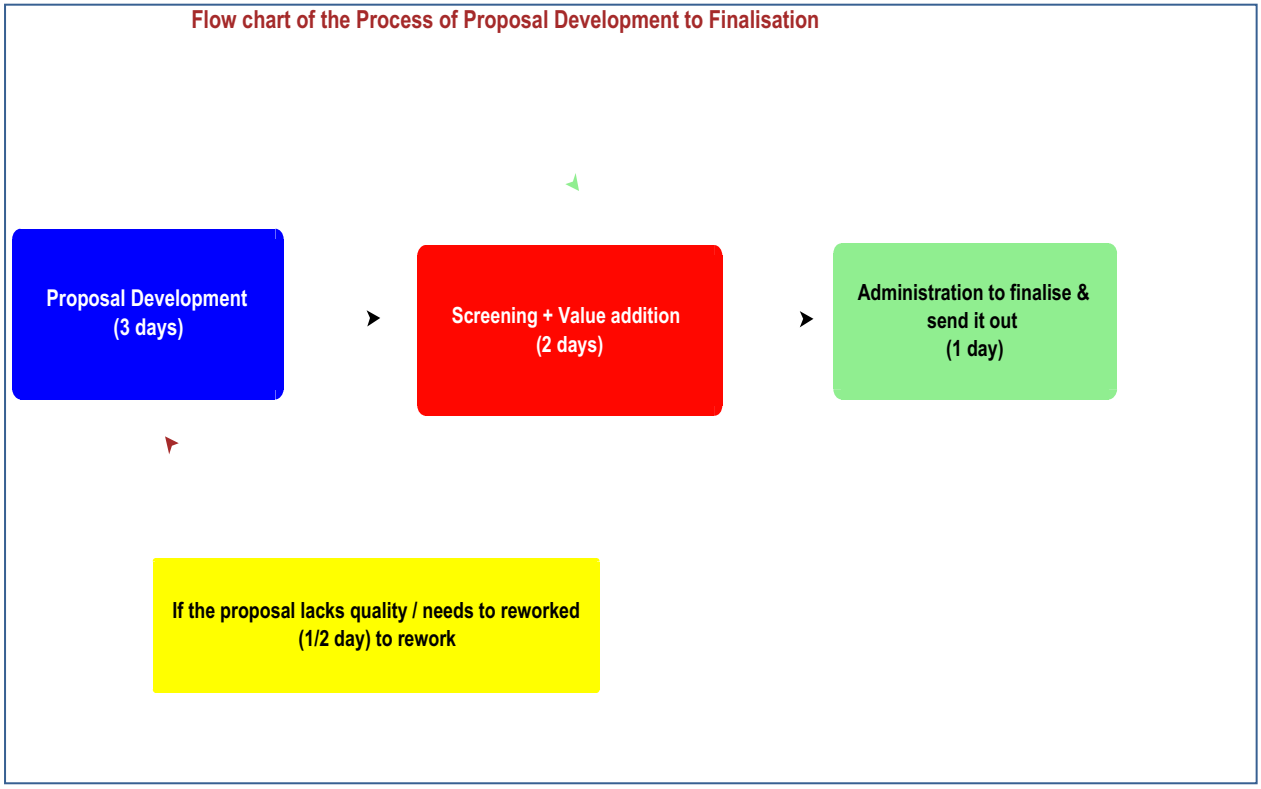
I. Steps involved in identification of a proposal / concept note /opportunities

a. Identifying, tracking and appraising opportunities: This process involves several aspects:
   - Systematically check online sources of bid information for procurement notices (i.e., General and Specific Procurement Notices)
   - **Donors' project cycle and early intelligence**: Fundamental to the process of pursuing contract opportunities understands the formal Project Cycle of donors which defines how projects are themselves programmed, identified, prepared and approved. It is important to gain information in an early stage, about projects in pipeline and upcoming funding opportunities.
   - **Procurement guidelines and policies along the project cycle:** It is also important to have a full understanding of the Procurement Guidelines/Policies of the targeted funding agencies which essentially constitute the 'rules of the game' for bidding, along the project cycle.
   - **Key sources of information and methods to track pipeline information**: There are numerous key sources of information on projects in the MDB's and other agency's "pipelines" and an increasing number of methods to track and develop additional information on target projects.
   - **Key sources to identify specific contract opportunities / tenders:** The ongoing process of researching, identifying, qualifying and tracking international development market contract opportunities is greatly facilitated by a variety of on-line sources of Project and Tender information.
   - **Informal information and intelligence gathering:** Try to determine the following (through interviews with key actors, and through document research)
   - Analyse tender, tender guidelines, project documents, background material, expert TOR etc in detail
   - Finalize bid strategy; attend any pre-bidding conferences; respond to EOI requests
   - Collaborate closely with partner in EOI and bid preparation
   - Carry out expert review of bid documents for compliance
   - Attend public bid opening

b. Specific Components, subcomponents, and the type of solutions that will be required on the project:
   - The key issue is whether ICSD services will be required for the contracts in the project
   - The overall budget estimate for the contract(s) is of interest to ICSD
   - The estimated value of the contracts
   - How the contract(s) will be tendered: What procurement or consultant selection method (i.e., quality-cost-based-selection etc.) will be used
   - When the tender(s) will be held or the RFP(s) issued
   - Ascertain mandatory requirements regarding eligibility (i.e., nationality, financial capacity)
   - Appraise and prioritize the projects and opportunities in regard to ICSD's mission, institutional strategy, country strategy and acquisition policy
   - Engage with and develop relationships with key decision makers in the project, implementing agencies and with appropriate funding agency staff/officers, as well as with local partners and other project participants

c. Goals: Get short-listed; Submit fully compliant, high-quality, cost-competitive bid on-time

Guidelines to follow on the time lines and Quality Check for Proposal Development



II. Key considerations regarding bidding participation and guidelines for writing proposal

a. Don't loose time, check for notices regularly. Notices are published daily. As EOIs or other submissions are often due less than 30 days from the on-line publication date, failure to check regularly can result in losing time to submit.
b. Learn what procurement method will be used, ideally in advance of formal tender (this will be specified in the RFP and usually in prequalification notices, but can usually be determined during earlier engagement activities);
c. Learn what criteria will be used to evaluate bid and assess proposal preparation implications of each criteria;
d. Always attend any bidding conferences, information meetings and the formal bid openings;
e. Assess competition (i.e., their experience, their cost structure);
f. Be technically compliant to specifications/TOR. Be precise and be quantitative where possible.
g. Ensure yourself that you comply with all the requirements listed in the tender guidelines. If the specifications, guidelines, TOR are ambiguous, seek clarification;
h. Seek budget: research project appraisal documents and other sources for budget and cost information;
i. Partnership: Locate local partners or form consortia. This ideally should be done at prequalification stage or earlier. Increasingly, points are awarded in the formal evaluation for local content, including in the form of qualified local partners/consultants and other inputs. Even where it is not explicit, local content is likely to make a bid more favorable. Seek out strategic partnerships with local partners, including with those who have bidding experience.

j. Prepare well-written, professionally-packaged proposal that is *submitted on time*. RFPs often only allow 30 days to prepare and submit technical and financial proposals. Accordingly, firms should be armed with as much knowledge as possible in advance, and proposal management must be efficiently organized to ensure a high-quality submission is produced in short period of time.
k. Calculate time to carry out a quality review of bid documents before submission.
l. Ask for debriefing after the evaluation of the proposal.

III. Guidelines for preparing a Project Proposal or Report

All the staff should follow the guidelines as laid in the style sheet. Please refer SoP 7 for style sheet. This will help reduce processing times of reports, proposals etc. The following are some of the guidelines been prepared with a view to standardising the formats of reports.

PART OF A REPORT: The recognised parts of a report include:

- Title page
- Executive Summary
- List of contents
- Introduction
- Main Body
- Conclusions / Recommendations

I. TITLE PAGE - The title page should have

- Tile of the report
- Prepared by
- Prepared for
- Date

II. EXECUTIVE SUMMARY
The Executive Summary is a concise gist of the report which summarises the contents.

III. LIST OF CONTENTS
This list should come soon after the Executive Summary. It should list the main (sub) sections in the report & Annexures, if any, in the order they appear along with the corresponding page number.

IV. INTRODUCTION
It may include the scope of the report, limitations faced, short history of the subject, special considerations that apply to the topic etc.

V. MAIN BODY
The body of the report gives the facts, findings, inferences etc. There may be many sections and sub-sections with appropriate headings and subheadings.

VI. CONCLUSIONS AND RECOMMENDATIONS

VII. ANNEXURES
At the end of the report there may be one or many annexures depending upon requirements.

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Process for drafting and finalisation of the Project Report/Document

Things to remember:

1. For easy accessibility and drafting the proposals the project profiles, CVs to be made available in server. Common depository of the CV and organisation profile, template of proposals to be put up in server. Regular update of organization profile and individual CVs must be ensured.
2. All the reports to go from info/CEO's name.