Call for Fellowships
Civil Society and Institutional Capacity Program: Project Management for Results (PM4R)

PROJECT MANAGEMENT FOR RESULTS (PM4R) COURSE
Call for Fellowships Rules

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1. BACKGROUND

In 2011, the Inter-American Development Bank (IDB) through INDES[1] launched the PM4R Program (Project Management for Results) in an effort to enhance the project management capacity of Bank clients, thus helping them to achieve the results expected within the time and budget frameworks set. The "Civil Society-Institutional Capacity" program was launched in 2015 with the purpose of adding human capital to the region's development by increasing the technical capacity Civil Society Organizations (CSOs). The program is the result of the work and leadership in Civil Society issues of the Vice Presidency for Countries, a unit of the IDB Group. The PM4R program has been made possible thanks to the partnership between the Knowledge and Learning Sector (KNL) and the Institute for Economic and Social Development (INDES).

2. OBJECTIVES OF THE CIVIL SOCIETY INSTITUTIONAL CAPACITY PROGRAM (PM4R/CIVIL SOCIETY)

- To increase human capital.

- To contribute to the Region's development by training CSOs from Latin America and the Caribbean in Project Management for Results.

3. CALLS FOR FELLOWSHIPS

The program regularly organizes contests in Spanish, English and French to award training fellowships to the project teams of qualifying CSOs during the 2017 cycle (the call schedule will be periodically updated at www.iadb.org/civilsociety; www.iadb.org/sociedadcivil).

4. TARGET AUDIENCE

Civil Society Organizations from IDB borrowing member countries who are working on one or more sectors/pillars of each the IDB country strategy (whether belonging to Civil Society Consulting Groups ConSoC or not).

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[1] INDES has nearly a decade's worth of experience conducting training activities, thus contributing to the promotion and dissemination of knowledge in support of the region's development. As a Registered Education Provider (REP) of the Project Management Institute (PMI), INDES has developed a 7-step methodology for the use of development project management tools, which are presented in a knowledge guide consisting of 4 modules. The methodology draws on the best international practices, tools and standards for project management, particularly the PMBOK Guide prepared by the Project Management Institute. The methodology is delivered by the Project Management Associate (PMA) and offers project teams the following learning objectives:
Strengthen development team members' knowledge and capacity to improve the Project Plan (PEP/AOP) in accordance with the 7-step methodology of the PM4R program.
Familiarize participants with concepts, good practices and technical terminology so they can communicate using a common language.
Accordingly, between 2011 and June 2014, more than 250 projects have participated from 23 Latin American and Caribbean countries, equivalent to 1,703 participants certified as PMAs.

5. **CLASSES/TRAINING**

1- *Maximum number of CSOs per call for proposal/class*: Each class will enroll a maximum of **seven (7) organizations representing seven (7) different countries from Latin America and the Caribbean**. There is no limit to the number of CSOs wishing to apply. Qualifying CSOs may be considered for future calls.

2- *Minimum and maximum number of participants per organization*: Each organization will present a **minimum of 3 and a maximum of 5 members** directly involved in the management of the selected project (see selection criteria below).

3- Maximum number of participants per class: Each class will enroll a maximum of thirty-five (35) participants.

4- *Maximum number of projects submitted per organization*: Each organization may submit up to **2 projects per contest (one application per project).** Incomplete applications will be dismissed.

6. **CHARACTERISTICS OF THE COURSE**

1- *Delivery method*: e-learning.

2- *Facilitator*: The facilitator is a project-management-certified professional (PMP from PMI / PMDPro from APMG) whose duties include delivering the course and providing ongoing personalized follow-up to participants.

3- *Methodology*: The learning methodology is designed to promote teamwork, interaction, dialogue, analysis, critical thinking, the exchange of experiences and the transfer of knowledge to the specific project reality of each participating team.

4- *Working Teams*: Those organizations that receive a fellowship will be divided into project teams. Each class will enroll between three (3) seven (7) teams that will start and finish their training at the same time.

5- *Monitoring*: The course will be permanently monitored by the PM4R Committee in coordination with the facilitator.

7. **DURATION**

The total duration of the course is eight (8) weeks, at an estimated rate of 8 to 10 hours per week, for a total of 40 hours of training distributed as follows:

- **Module I:** The training course starts on Tuesday with an Opening Webinar. Participants will then have access to the contents of the class in order to familiarize themselves with them. They will also be required to complete a previous knowledge test (Pre-Test).

- **Module II:** Development Project Management Tools (start-up and planning): *Project Charter and Project Breakdown Structure.*

- **Module III:** Development project management tools: *Project Timeline*.

- **Module IV:** Development project management tools (planning): *S-Curve and Procurement Matrix.*

- **Module V:** Development project management tools (planning): *Risk Matrix and Communication Matrix.*

- **Module VI:** Development Project Management Tools (planning and oversight): *Responsibility Matrix and Added Value Management.*

- **Module VII:** During this week, participants will dedicate their efforts to preparing the presentation of their project and to completing both the course satisfaction survey and the post-training knowledge questionnaire (Post-Test).

- **Module VIII:** The course ends on Tuesday with a Closing Webinar where participants will vote the videos of the projects presented by the different teams.

8. **SELECTION CRITERIA**

1- *Selection of organizations*
- CSOs from Latin America and the Caribbean: All Civil Society Organizations (members of Civil Society Consulting Groups – ConSoC and other CSOs) are welcomed to participate. Currently engaged in development projects in any of the Region's 20 Spanish speaking countries, 5 English speaking Caribbean countries and 1 French speaking country (Haiti).
- A maximum of five (5) participants: Each organization may enroll a maximum of 5 participants who are directly involved in the project that will receive the lessons learned during the course (see "Selection of participants" below).

2- *Selection of projects*

- Projects in the early stages of execution: The *projects selected* for consideration of the Selection Committee must be in the *initial stage of execution*[2] as a way to ensure the project team will have sufficient time to apply the lessons learned during the course to the project.
- Project financing: Selected projects may be financed by the Bank[3] or other donors.
- Project team: All selected projects must involve the participation of staff who are indispensable for the execution of the project (see "Selection of participants/project teams" below).

3- *Selection of participants/project teams*

- Fellowship winners: Pre-selected and selected participants must be directly involved with the contents and execution of the project. Furthermore, their absence will compromise the transfer of knowledge to the project.
    1. Project and organization management: Organization director/manager who must be directly involved in project execution.
    2. Technical: Project Team Head/Manager, Head of Planning and specialists responsible for the different components of the project.
    3. Administrative: Financial, procurement, accounting team, etc.

9. **IDB in country Selection Authority:**

   Step 1: The Civil Society Liaison of the IDB Country Office will select, at its own discretion, the organization(s) based on their projects and will escalate the case(s) for a second evaluation by the PM4R Selection Committee.

   Step 2: The Committee will select a maximum of 7 organizations from 7 different countries of the region per class. The maximum enrollment per class will be 35 participants. At the end of Pilot Phase 1, we expect to have trained 280 participants from 26 counties and 56 organizations.

10. **RESPONSIBILITIES OF FELLOWSHIP RECIPIENTS**

- The IDB allows the fellowship funds to the selected organizations and participants. Recipients must therefore understand that any drop outs will deprive other applicants from the region of the chance to take full advantage of those funds.
- Participation in the opening and closing workshops is mandatory, just like all other course-related activities described in the Participant's Guide. We recommend going through the Guide in detail prior to starting the course in order to be fully acquainted with the course requirements and procedures.
- All participants are required to complete the assignments for each module during the corresponding week. Once the module closes on Monday, participants will no longer have access to the activities.

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[2] In case the project has exceeded the first year of execution, the application must be justified. Still, the project must be in its execution phase.

[3] If the project selected is financed by the Bank, the relevant Bank department or division will be duly notified.

- Most of the e-learning work will be carried out in an asynchronous manner. Nevertheless, a number of Webinar sessions will be organized for the facilitator and the participant to interact synchronously.
- Course participants are responsible for their own learning process and must commit to the following:

  ✓ Enter the virtual classroom at least once daily to stay informed of the activities proposed, the suggested readings and class assignments, as well as any communications from the facilitator or the course coordinators.
  ✓ Review the course materials to complete the tasks contained in the academic agenda successfully.
  ✓ Complete the proposed assignments within the time frames established. Submittal deadlines are firm and exceptions will not be accepted, unless special justification is sent to the facilitator explaining the reasons for the non-compliance.
  ✓ Participants must inform the facilitator of all the exceptionalities that may prevent them from following the course as scheduled and commit themselves to completing any pending tasks as directed by the facilitator.
  ✓ Complete all mandatory course assignments.
  ✓ Meet all the requirements needed for the successful completion of the course.

FAILURE TO COMPLY

Those participants who fail to comply with these obligations will lose their right to attend classes. Similarly, any of the following behaviors will lead to an immediate suspension of such right:

- Failure to attend classes for a week.
- Failure to submit or properly complete more than two compulsory assignments.
- Displaying inappropriate behavior in the virtual classroom, even after being warned by the facilitator of the inappropriateness of such behavior.
- Failure to comply with INDES regulations regarding the use of the virtual classroom.
- Sharing the user name, password or the online course with somebody else, or transferring, renting, selling or using the online course either temporarily or permanently without the prior written consent from INDES.

11. CRITERIA FOR OBTAINING THE PMA CERTIFICATION

At the end of the course, those participants who have fulfilled the requirements listed below will obtain their certification as Project Management Associate (PMA):

- Participate in the webinars.
- Complete the Pre-Test, Post-Test and Satisfaction Survey.
- Obtain a passing grade of 65% or more.

12. APPLICATIONS

1. *Submission of applications*. Candidates must deliver or submit their duly completed applications (following the specific forms provided) to their respective Country Office within the time frames established.

Project management teams that wish to enroll in the PMA course must e-mail their application form to the **Civil Society Liaison of the respective IDB Country Office** (**http://www.iadb.org/en/civil-society under the section "Our Team")** – a list of liaisons is included in the Annex part of this document.

Please, include the name of the organization in the name of the document as shown in the following example: "NAME OF THE ORGANIZATION - List of Participants PM4R 2016.xls"

13. ADDITIONAL BENEFITS

PM4R CLOUD Those participants who have fulfilled the requirements for PMA certification listed in section 7 will have access to a virtual forum called PM4R Cloud, where they can exchange solutions and ideas as well as strengthen their capacities in development project management.

CONECT@R Civil Society. All participants may enhance the visibility of their organizations and publicize the results obtained both inside and outside the training in the new Conect@r Civil Society platform (for more information visit www.iadb.org/en/civil-society starting April 2016).

Exposure with Civil Society Participants in the Region. All participants will be able to share the experiences with their CSOs by recording a video of one minute at the end of the program. This video will be shared with Civil Society Sector in the LAC region.

Further details on the fellowship program are available from the IDB-Civil Society site under the "**Collaboration**" section. Here, interested CSOs may download the contest rules and current application forms: http://www.iadb.org/civilsociety. Direct link: http://www.iadb.org/en/civil-society-v3/civil-society-institutional-capacity,19344.html.

TERMS OF REFERENCE

Washington, DC

Vice Presidency for Countries (VPC/VPC)

ToR for Selection of OSC to record Civil Society video with success story about project implementation

I. Background

The Inter-American Development Bank (IDB) is the leading source of development financing for Latin America and the Caribbean, with a strong commitment to achieve measurable results, increased integrity, transparency and accountability. It supports efforts by Latin America and the Caribbean countries to reduce poverty and inequality and bring about development in a sustainable, environmentally-friendly way.

The Vice Presidency for Countries led the IDB Group Civil Society engagement and works to promote development by including civil society through five steps of engagement: information, dialogue, consultations, collaboration and partnerships. The Civil Society team works with project teams to execute the IDB commitment to move forward development by adding human capital to the development efforts by including solid and well technical prepared civil society organizations (CSOs).

A feature of the deep-seated changes that have swept Latin America and the Caribbean in the past decades – democratization, economic reforms, decentralization –and the impact of globalization and new information technologies is recognition of the growing importance of citizen participation in public policy development and implementation. However, in the past decades, owing to the prevailing political climate, there has been limited cooperation (and in some instances mistrust, misunderstanding and confrontational views) between civil society and the State.

Within this context, the Bank has played an important role in strengthening the civil society of the LAC region by increasingly incorporating civil society participation in its operations and processes whereby citizens can have the possibility to influence decisions related to its activities and objectives.

II. Objectives

The objective of is that each CSO records a video with a successful story about project implementation thanks to the Institutional Capacity Program. This video will be useful to strengthen the institutional capacity of CSOs by creating exposure to other civil society organizations. Another objective is the inclusion of more technical organizations to improve development in the LAC region.

III.   Activities

The main activity is to record a video that contains a success story in the CSO by the implementation knowledge received by the IDB fellowship and into the Civil Society Institutional Capacity Program. The best videos will be shown (further on) in IDB's Civil Society activities.

IV.   Deliverables

1. One video with duration of **minimum 60 seconds and maximum of 90 seconds** about success story within the CSO. The structure of the script to be included is provided as an Annex section.
2. The language of the video is in either English or Spanish. Portuguese and French participants can apply if they kindly record their videos with English subtitles to facilitate its dissemination.

All deliverables must be submitted no later than the advised timeline. Submit video to Carmen Taveras (carment@iadb.org). For further questions please call 202-623-1716.

V.   Qualifications

Eligible CSOs are considered as those who have received an IDB Fellowship (PMC, PM4R) corresponding to the IDB Group Civil Society Institutional Capacity Program.

VI.   Characteristics

Payment and Conditions: There will not be compensation. This activity will not have monetary reward however it will give the CSO exposure in the region with other organizations that participate in the IDB Capacity Building programs.

Consanguinity: Pursuant to applicable Bank policy, candidates with relatives (including the fourth degree of consanguinity and the second degree of affinity, including spouse) working for the Bank as staff members or Complementary Workforce contractual, will not be eligible to provide services for the Bank.

Diversity: The Bank is committed to diversity and inclusion and to providing equal opportunities to all candidates. We embrace diversity on the basis of gender, age, education, national origin, ethnic origin, race, disability, sexual orientation, religion, and HIV/AIDs status. We encourage women, Afro-descendants and persons of indigenous origins to apply.

Annex

I. Video Script- Main mandatory points to be included:

Video Name: Success story in CSO organization
The minimum duration of video is 60 seconds. The maximum duration of video is 90 seconds
Videos that have a shorter or larger duration will not be considered.

0 – 0.30 Second(s): Introduction of CSO
The video will show a member of the selected CSO preferably registering the images on the field of action of the CSO (no offices, no closed spaces but in front of the CSO regular activities) on 30 seconds presenting:

- **CSOs objective:** what it does and how it does it
- **CSOs sector:** what sector does it belong and why. Contextualize with situation of the sector overall[4]
- **CSOs Statistics:** number of employees and years of experience in the working sector.

0.30- 0.60[5] Second(s): Images will be showing beneficiaries on the project's location. Speaker will be explaining benefits of participating in IDB Group Capacity Building Program
The video will show the success story of the CSO participating in the program. It will highlight the following:

- Impact of program participation in the CSO's performance (ie, comparisons before and after training)
- New concepts and techniques learned by participating in the program.
- Word of advice and inspiration to other CSOs.

Ambiance:
The video will be recorded where the CSO is located. It will be on an environment noise free. However it will show the true nature of the CSO. Recording is not feasible in offices, closed spaces.

Format:
The video can be taped in either a smart phone (high quality) or with a professional camera. The choice is up to the CSO. The delivered final product has to be minimum 60 and maximum of 90 seconds

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[4] **Please mention one of the following sectors:** Agriculture and Rural Development; Water and Sanitation; Science and Technology; Commerce; Urban Development and Housing; Education; Private Enterprises and Development of Micro Enterprises; Energy; Industry; Regional Integration; Social Investment; Environment and Natural Resources; Financial Markets; Labor Markets; Health; Transportation; Sustainable Tourism.

[5] Note that the duration of this second part: Benefits of participating in IDB Group Capacity Building Program, the video can be extended to 0.30 to 0.60 seconds *maximum.*

(including images, talks, and editions – if needed). Please only send video in a format easy to discharge (Vimeo, Youtube, Wetransfer). This video will only be shared with the IDB's Civil Society Group, especially on promoting future Capacity Building Programs of the IDB Group – Civil Society Group.

II. IDB Group Civil Society Liaisons

Civil Society Liaisons | Updated to January 2017

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