

# Webinar: "Unusual suspects – How to successfully apply to USAID and DFID"



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- Please make sure you can hear and see the webinar presentation: you might have to adjust your audio settings or your Flash Player settings!
- Please keep questions until the end. We will have a chat box opening after the presentation where you can post your questions or comments.
- The presentation will be available for download in the TripleFunds membership area in the menu bar "Resources" and "Webinars". We will also send you a copy via e-mail and provide you with the audio recording.
- You are most welcome to also post questions after the webinar to silvia.weninger@triple-minds.com
- The duration of the presentation is 60-70 minutes. Then we have 20-30 minutes for our Q&A session.



# Today's agenda

1. Whom are we dealing with?

Overview and comparison of USAID and DFID

2. How does the application process work?

Application procedures, guidelines and templates

3. Tips & tricks for accessing their funds

Our lessons learned from successful applications



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### Who



- United States Agency for International Development (USAID)
- Independent federal agency
- Annual budget of appr. \$36 billion
- Set up in 1961
- Employs around 10000 staff

- Department for International Development (DFID)
- Ministerial department
- Annual budget of appr. GBP12 billion
- Set up in 1997
- Employs around 2700 staff

## **Mission**

"We partner to end extreme poverty and promote resilient, democratic societies while advancing our security and prosperity." "We are tackling the global challenges of our time including poverty and disease, mass migration, insecurity and conflict. Our work is building a safer, healthier, more prosperous world for people in developing countries and in the UK too."





### **Priorities**



- Agriculture and food security
- Democracy, human rights and governance
- Economic growth and trade
- Ending extreme poverty
- Environment and global climate change
- Gender equality and women's empowerment
- Global health
- Water and sanitation
- Working in crisis and conflict

- Strengthening global peace, security and governance
- Strengthening resilience and response to crisis
- Promoting global prosperity
- Tackling extreme poverty and helping the world's most vulnerable

Country Development Cooperation Strategy (CDCS) for 5 years:

https://www.usaid.gov/results-and-data/planning/country-strategies-cdcs

**DFID Profiles for focus countries:** 

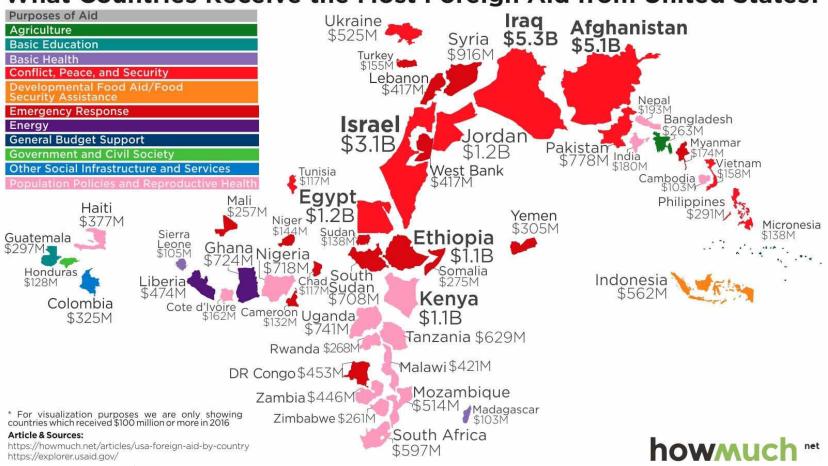
https://www.gov.uk/government/collections/dfid-profiles-july-2017





## **Countries - USAID**

## What Countries Receive the Most Foreign Aid from United States?









## **Countries - DFID**





# 28 DFID priority countries







### **Countries - DFID**

#### **KEY DFID INDICATORS**

#### Top 10 places we work Top 10 things we do Top 5 things we achieve Children immunised against preventable Pakistan Disaster relief disease through support to Gavi, the Ethiopia Health Vaccine Alliance 67.1 million Government and Civil Society Nigeria People reached with one or more water, Somalia Education sanitation or hygiene promotion intervention Banking and Financial Services Yemen 64.5 million Bangladesh Agricultural Children under 5, pregnant and breastfeeding women reached through Congo (Democratic Republic) Multisector DFID's nutrition programmes 30 million Syria Industry Children supported in primary and lower Tanzania **Environment** secondary education South Sudan Other Social Infrastructure and Services 11.3 million Women using modern methods of family planning Project budgets for each country [FY17/18] Project budgets for each sector [FY17/18] 9.9 million Results achieved (up to 2015/16 inclusive) from DFID Annual Report 2015-16







## **Our experience**



- Strong (local) involvement in implementation process
- Well-staffed offices with high-profile sector experts
- Capacity building arrangements (i.e. trainings, regular program exchanges with other lps)
- Certain flexibility in contracting arrangements
- Tend to work with US partners quite often
- Not only non-profit organisations are leads but very often profits
- Standardised M&E arrangements (i.e. standard indicators)
- Co-funding often not a pre-requisite
- USAID is ready to make advance payments

- Whole programs often outsourced to Fund Managers (i.e. UK Aid Direct)
- Less involved in implementation on the ground
- Capacity building possibilities (i.e. experts for LogFrame upgrade)
- Strong focus on Value for Money
- Very concerned with transparency (i.e. IATI)
- Due diligence checks during contracting stage
- Non-profit organisations and profits are eligible
- Co-funding often a pre-requisite (already during application process)
- Financial year runds from 1 April to 31 March
- DFID is ready to make advance payments



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# USAID: 5 step workplan to find funding opportunities

1. Mission websites and Country Strategies

2. Business Forecast Reports

3. Annual Program Statements (APS)

4. Grants.gov

5. Unsolicited response





# 1. Mission websites and Country Strategies

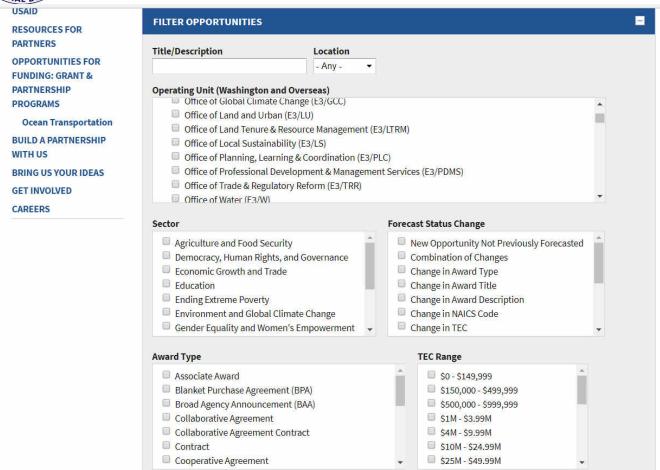
#### **Table of Contents**

Executive Summary	
Acronyms and Abbreviations	
Development Opportunities and Challenges	
Country Overview	
Opportunities and Obstacles	1
Government and Donor Alignment	1
Analyses Undertaken	1
Results Framework	1
Overall Goal: Ethiopia's Transformation to a Prosperous and Resilient Country Accelerated	1
Relationship of DOs to overall goal	1
Policy Priorities and 'Soft' Power	1
DO 1: Increased Economic Growth with Resiliency in Rural Ethiopia	2
DO 2: Increased utilization of quality health services	
DO 3: Improved Learning Outcomes	4
Support Objective - Improved Governance Environment for Sustainable Development Improved	5
Procurement Reform	6
Monitoring and Evaluation	6
Resources and Priorities	7
USAID/Ethiopia CDCS Budget	7
USAID/Ethiopia FY2012 Initiative Breakout	7
Non-USG Resources	7





## 2. Quarterly Business Forecasts









## 2. Business Forecast Sample

#### Return to search results

Operating Unit: Vietnam

"Sustainable Model for Improving the Inclusion of Persons

with Disabilities" Program

Award/Action Type: Grant

Sector: Democracy, Human Rights, and Governance

Solicitation Number: 72044018RFA00001

A&A Specialist / POC: Hoang Thi Nhu Hoa

Anticipated Solicitation Release Date:

Small Business Set-Aside: N/A Award Length: N/A

Forecast Status Change: N/A

Anticipated Award Date:

Total Estimated Cost/Amount Range:

1/08/2018

7/02/2018

\$10M - \$24,99M

NAICS Code: N/A

Fiscal Year of Action: 2018

Last updated: 1/08/2018

"Sustainable Model for Improving the Inclusion of Persons with Disabilities" Program

Alternatively, you can download the information in Excel version (roughly 200 forecasts), listen to Conference recordings, sign up for the e-mail alert service





## 3. Annual Program Statements (APS)

- Global Development Alliance (GDA) <a href="https://www.usaid.gov/gda/">https://www.usaid.gov/gda/</a>
  - USAID's premier model for publicprivate partnerships, helping to improve the social and economic conditions

- Development Innovation Venture (DIV) <u>https://www.usaid.gov/div</u>
  - = USAID's open competition supporting breakthrough solutions to the world's most intractable development challenges

- APS is in general not supported by specific funds but often followed by an Addendum which does provide specific funds
- Open for app. 12 months, then renewed
- Describes the program (objectives, results, activities) as well as application procedures, eligibility and evaluation methods



## 4. Grants.gov



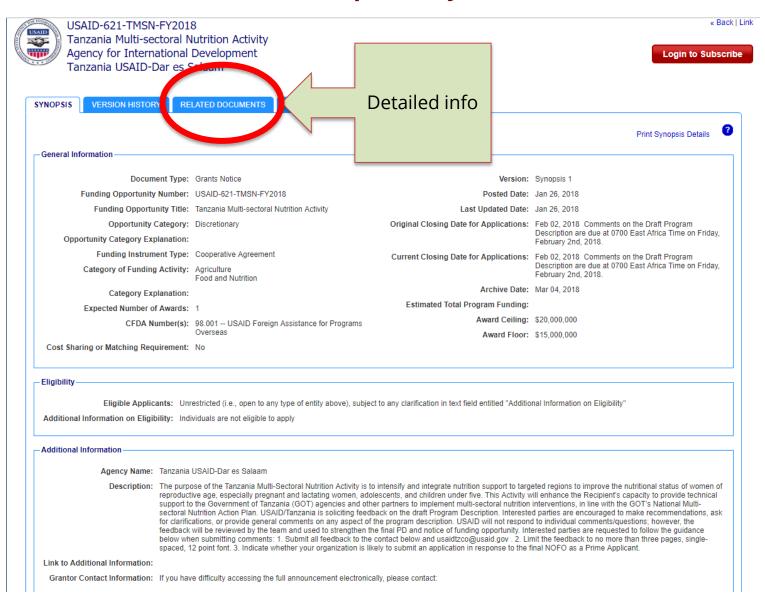
THE AID1 (74)

https://www.grants.gov/web/grants/search-grants.html

#### Search criteria Opportunity list BASIC SEARCH CRITERIA: Search Tips | Export Detailed Data Keyword(s): SORT BY: Posted Date (Descending) Update Sort DATE RANGE: All Available Update Date Range Opportunity Number: CFDA: 1 - 25 OF 2144 MATCHING RESULTS: « Previous 1 2 3 4 5 6 ... 86 Next » **SEARCH** Opportunity Posted Date | Opportunity Number Opportunity Title Agency Close Date Status **OPPORTUNITY STATUS:** EAPBJ-18-GR-001-EAP012618 Programming in the People's Republic of China DOS-CHN 01/29/2018 03/11/2018 Forecasted (195) Posted Posted (1,949) CDC-RFA-TP17-17010201SUPP18 Hospital Preparedness Program - Public Health Emergency HHS-Forecasted 01/28/2018 Preparedness Cooperative Agreement Department of Health CDC-Closed (2,579) and Human Services **OPHPR** Archived (42,432) Marriage Strengthening Research & Dissemination Center HHS-2018-ACF-OPRE-PR-1372 HHS-Forecasted 01/26/2018 ACF-**OPRE ▼ FUNDING INSTRUMENT TYPE:** BOG-PAS-FY18-1 U.S. Embassy Bogota Small Grants Program DOS-COL Posted 01/26/2018 05/31/2018 All Funding Instruments PAR-18-588 Assistive Technology for Persons with Alzheimer's Disease HHS-Posted 01/26/2018 01/08/2020 Cooperative Agreement (528) and Related Dementias and Their Caregivers (R43/R44 -NIH11 Grant (1.677) Clinical Trial Optional) Other (59) DE-FOA-0001749 Notice of Intent to Issue Funding Opportunity Announcement DOE-Posted 01/26/2018 entitled Flexible Combined Heat and Power Systems for Grid NETL Procurement Contract (44) USDA-USDA-NIFA-WAMS-006470 Women and Minorities in STEM Fields Posted 01/26/2018 03/28/2018 **▼ ELIGIBILITY**: NIFA All Eligibilities USAID-621-TMSN-FY2018 Tanzania Multi-sectoral Nutrition Activity USAID-Posted 01/26/2018 02/02/2018 City or township governments (1,113) TAN County governments (1,118) PA-18-589 Successor-in-Interest (Type 6 Parent Clinical Trial Optional) HHS-Posted 01/26/2018 01/25/2021 NIH11 For profit organizations other than small NPSNOIBAND1800167 DOI-NPS businesses (1.068) Bus Shuttle Service 01/26/2018 02/05/2018 Posted PAR-18-594 NIAMS Clinical Trial Implementation Cooperative Agreement HHS-Posted 01/26/2018 11/03/2020 (U01 Clinical Trial Required) NIH11 **▼ CATEGORY:** HHS-PAR-18-595 Exploratory Clinical Trial Grants in Arthritis and 01/26/2018 11/03/2020 Posted All Categories Musculoskeletal and Skin Diseases (R21 Clinical Trial NIH11 Affordable Care Act (1) Required) Agriculture (31) HRSA-18-108 Service Area Competition-Additional Areas (SAC-AA) -HHS-Posted 01/26/2018 03/27/2018 Newark N.J. HRSA Arts (see 'Cultural Affairs' in CFDA) (16) DRLA-DRLAQM-18-004 FY18 DRL Internet Freedom APS DOS-DRL Posted 01/26/2018 02/12/2018 Business and Commerce (12) RFA-RM-18-001 The Human BioMolecular Atlas Program (HuBMAP) HHS-Posted 01/25/2018 04/16/2018 Integration, Visualization and Engagement (HIVE) Initiative NIH11 **▼** AGENCY: (OT2 Clinical Trials Not Allowed) All Agencies RFA-AG-19-001 Alzheimer's Disease Research Centers (P30 - Clinical Trials HHS-Posted 01/25/2018 06/04/2018 All Agency for International Development Not Allowed) NIH11

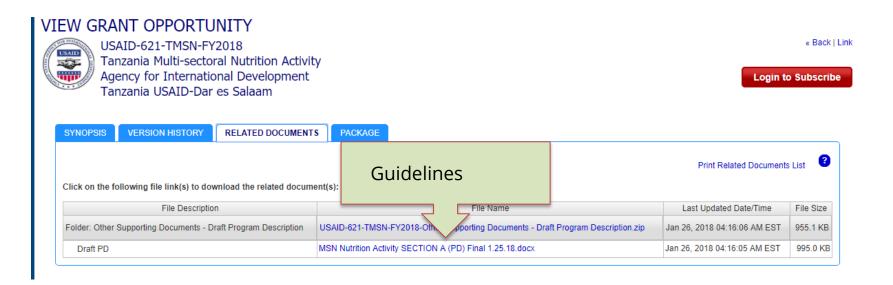


## Sample entry





## Sample entry and guidelines



- Section A Funding Opportunity Description
  - Introduction and Background, Strategic Context
  - Program Description: Objectives and Results, ToC, Geographical Focus, Cross Cutting Issues, Standard Indicators
- Section B Federal Award Information
  - Funding volume, start date and performance period
- Section C Eligibility Information
  - Eligibility, cost share
- Section D Application and Submission Information
  - Contact persons, content and procedures
- Section E Application Review Information



## Sample application document

## Part A – Technical Application

- Cover page or Cover letter (1 page)
- Acronyms and Table of Content (2 pages)
- Executive summary (2 pages)
- Technical approach (25 pages)
- Management structure and staffing plan (4 pages)
- Institutional experience (2 pages)

### Part B – Cost Application

- Forms SF-424, SF-424A and SF424B
- Breakdowns by year and donor (cost-share)
- Narrative budget explanations
- Certifications and assurances

## **IMPORTANT STEPS:**

- 1. Get DUNS number (Data Universal Numbering System): <a href="http://fedgov.dnb.com/webform"><u>ttp://fedgov.dnb.com/webform</u></a>
- 2. Get CAGE/NCAGE Code
- 3. Register in SAM (System for Award Management): <a href="https://www.sam.gov/portal/SAM/##11">https://www.sam.gov/portal/SAM/##11</a>
- 4. Register with Grants.gov: https://www.grants.gov/

# Sample SF-424

View Burden Statement	×	OMB Number: Expiration Date:	
Application for Federal Assistan	ce SF-424 ×		
* 1. Type of Submission: ×  Preapplication	*2. Type of Application:	* If Revision, select appropriate letter(s):	
Application	Continuation	* Other (Specify):	
Changed/Corrected Application	Revision		
	4. Applicant Identifier:		
	00100 <b>6</b> 000 0000 000000 00000		
5a. Federal Entity Identifier:		5b. Federal Award Identifier:	
State Use Only:		3	
6. Date Received by State:	7. State Applicati	tion Identifier:	
8. APPLICANT INFORMATION:			
* a. Legal Name:			
* b. Employer/Taxpayer Identification Numb	per (EIN/TIN);	* c. Organizational DUNS:	
d. Address:			
* Street1:			
Street2:			
* City:			
County/Parish:			
* State:			XX.
Province:			
* Country:		7	×2
* Zip / Postal Code:			
e. Organizational Unit:			
Department Name:		Division Name:	





## 5. Unsolicited response (max. 5 pages)

#### Basic information

- Name and address
- Contact person
- Names of other donors where proposal was sent
- Date of submission
- Signature of authorized person

#### Technical information

- Concise title and abstract
- Objectives
- Methods of approach
- Results
- Names of key personnel
- Type of support needed

## Supporting information

- Total cost
- Time period
- Description of organisation
- Other statements (i.e. environment, security clearances)



https://www.usaid.gov/work-usaid/get-grant-or-contract/unsolicited-proposals





# DFID: 4 step workplan to identify funding opportunities

1. Country Profiles and in-country funding

2. Supplier engagement events

3. DFID funding finder

4. Supplier portal





## 1. DFID Country Profile Sample

Department for International Development

#### **DFID AFGHANISTAN**

The Department for International Development (DFID) leads the UK's global efforts to end extreme poverty, deliver the Global Goals for Sustainable Development (SDGs) and tackle a wide range of global development challenges. The UK's focus and international leadership on economic development is a vital part of Global Britain - harnessing the potential of new trade relationships, creating jobs and channelling investment to the world's poorest countries. Throughout history, sustained, job-creating growth has played the greatest role in lifting huge numbers of people out of grinding poverty. This is what developing countries want and is what the international system needs to help deliver. Whilst there is an urgent need for traditional aid in many parts of the world, ultimately economic development is how we will achieve the Global Goals and help countries move beyond the need for aid.

Planned Budget for 2017/18	£155m £155m  Top 3 planned spending programmes in 2017/18 (as at June 2017)			
Planned Budget for 2018/19				
Sector breakdown of 2017/18 bilateral plans				
	Afghanistan Reconstruction Trust Fund, 2014 -2018	£86.2m		
Human Development Development	Multi-Year Humanitarian Support to Afghanistan	£27.8m		
Governance and Security 28%	Comprehensive Agriculture and Rural Development Facility	£8.6m		
Global Partnerships 1%				

#### Contribution to the Global Goals and other government commitments (achieved as at March 2017)\*

UK support is helping to build a more stable Afghanistan that is less dependent on external support over the long term. The UK is supporting the Afghan people by helping to provide them with greater access to healthcare, education, and safe drinking water, as well as helping create jobs, boosting economic development, and tackling corruption. To this end, the UK has pledged to spend up to £750 million in aid to Afghanistan between 2016 and 2020 depending on security conditions and Afghan government performance.

#### Headline deliverables

- Economic development: We will create more than 35,000 jobs by 2023 and generate \$600m of new
  private sector investment. We will improve land productivity and create jobs by clearing over 87 km² of
  land, made unusable by mines and explosives (equivalent to over 12,000 football pitches).
- Basic services and humanitarian: We will help poor people, including girls and women, access









## **DFID's Supplier Engagement Events 2018**



The Supplier Engagement Calendar includes Early Market Engagements and other events that DFID are hosting.

This list is updated regularly reaching our wide supply base.

Once registered on DFID's Supplier Portal, you can register your attendance for events by following the links provided. If you turn up to the event without registering via the link, you will not be allowed entry.

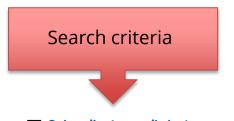
If you have any further questions or queries please email supplierengagement@DFID.gov.uk



Please follow @DFIDProcurement on Twitter!

Date of Event	Event Type	Title of Event	Location	How to register your attendance?
22 February 2018	Supplier Event	DFID Uganda Partners Day	DFID Uganda	Invite Only
2 February 2018	Local Supplier Event	Local Supplier Event	DFID Uganda	Invite Only
2 February 2018	Early Market Engagement	Forest Governance, Markets and climate Change (FGMC) Programme (PO 8180)	DFID Whitehall	http://bit.ly/2DDQhfm
2 February 2018	Early Market Engagement	ICAI Phase 3 EME (PO 8185)	DFID Whitehall	http://bit.ly/2CUSu1C
30 January 2018	Early Market Engagement	GGF Managed Fund Phase 2	Foreign & Commonwealth Office, London	Invite Only
26 January	Early Market	Scaling Up Family Planning in Tanzania	DFID East Kilbride	http://bit.ly/2DNYpa4





## 3. Funding finder





■ Subscribe to email alerts

Search

Funds ^
Open
Closed

Countries V

Sector Y

Eligible organisations V

Value of funding Y

Get updates to this list afeed

#### Forest Governance, Markets and Climate Programme

FGMC will provide a new round of grants for projects that support governance and market reforms that reduce the illegal use of forest resources and benefit poor people.

Open

#### **UK Aid Match**

Provides grants to UK based CSOs for poverty reduction projects in developing countries.

Open Afghanistan and 25 others

#### **UK Aid Connect**

UK Aid Connect will support consortia to create innovative solutions to complex development challenges that deliver real change to poor people's lives.

Open Afghanistan and 24 others

#### Amplify: collaborative challenge fund

An open and agile challenge fund focusing on sourcing early stage ideas to tackle emerging development challenges.

Closed Afghanistan and 27 others

## Developing Effective Private Education in Nigeria Challenge Fund (DEEPEN)

 $\label{lower} \textbf{Allow service providers to support unconventional solutions to long standing problems in}$ 







## **DFID Main programs**

#### UK Aid Match

https://www.gov.uk/international-development-funding/uk-aid-match

= matching private donations to charity appeals from the aid budget

#### UK Aid Direct

https://www.ukaiddirect.org/

= small and medium sized CSOs are able to competitively bid into an expanded 'pot' of central funding, to help them deliver life changing outcomes for the world's poor

#### UK Aid Connect

https://www.gov.uk/internationaldevelopment-funding/uk-aid-connect

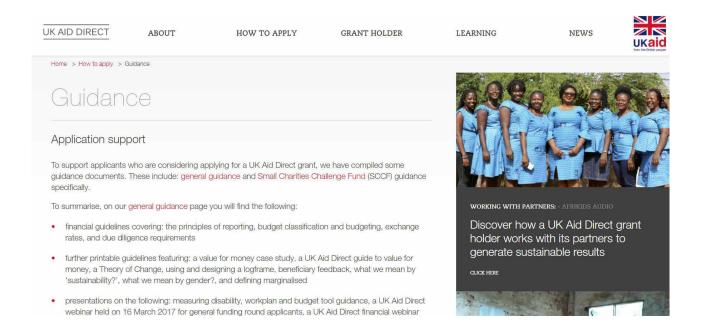
= create incentives for innovation and collaboration between CSOs, think tanks and the public and private sectors to solve key challenges in development

#### UK Aid Volunteers

= offer targeted support to effective global volunteering programmes



## Sample entry and guidelines



- No standardised guidelines but usually DFID calls cover:
  - Program description
  - Impact and outcome
  - Eligible country/-ies
  - Funding volumes and cost-share
  - Timeframe
  - Application process
  - Application templates
  - Theory of Change



## Sample application document

### 1. Narrative Proposal

- Section 1: Programme details (Maximum 15 A4 pages)
- Section 2: Theory of Change (Maximum 3 A4 pages)
- Section 3: Background and track record of consortium members
- Optional: organogram, gantt chart, organisational accounts

### 2. Programme Budget

- No standardized form, Excel versions with budget narrative
- ToC or LogFrame

1.1	PROGRAMME SUMMARY: Please provide a brief programme summary including the overall change(s) that the initiative is intending to achieve and who will benefit. Please be clear and concise and avoid the use of jargon
1.2	PROPOSED POVERTY REDUCTION IMPACT AND OUTCOME: Set out the expected Impact and Outcome in terms of poverty reduction, gender disaggregated impact and intended beneficiaries. The statement of impact should be clearly presented in the Theory of Change. Determine what needs to happen before the Impact can occur; explain why and how the Outcome can be expected to lead to the desired Impact and whether the Impact is likely to be sustained.
1.3	CONSORTIA APPROACH: clear ideas and approaches demonstrating why this specific consortium is the most effective way to address this/these specific development challenge/s to bring about lasting change in an innovative way.



## 4. DFID Supplier Portal



### https://supplierportal.dfid.gov.uk/selfservice/pages/public/publicBullet inSearch.cmd



DFID Portal Guidance and Instructions Procurement at DFID Website Terms and Conditions Service Contracts Standard T and C's

Please follow @DFIDProcurement on

#### **Existing Supplier/Fund Recipients**

Please enter your username and password then select the Login button below.

#### Username

#### Password



Forgotten login details?

#### **New Suppliers/Fund Recipients**

Please ensure you have read the guidance and instructions as well as the Terms and Conditions before proceeding.

To register your organisation and create an account, please select the Regis button below:



Welcome to the DFID Portal. This interactive Portal is provided for all DFID direct suppliers and fund recipients with the aim of improving business processes and reducing c

#### The Portal is:

- The central source of information for all DFID contract opportunities and contracts awarded available free of charge
- An on-line register for all suppliers and fund recipients doing business with DFID
- A platform for DFID to conduct e-tendering with suppliers

#### Announcement from Secretary of State:

The Secretary of State has written a letter to DFIDs suppliers reiterating the standards we expect of them and setting out new safeguards we have put in place



Letter to Suppliers

#### Existing Suppliers and Fund Recipients:

Please enter the DFID portal using your username & password or the instructions sent to you. You should familiarise yourself with the Terms and Conditions for use of the DFID Portal.

Guidance and Help is available on the DFID Portal Pages and on the DFID website.

#### Future business with DFID:

If you are a supplier or fund recipient and want to register for future contract opportunities or to simply provide us with your organisations (including payment) details please use the register

If you simply wish to view current contract opportunities and details of contracts awarded click on the Bulletin Board link below



**Bulletin Board** 

is to obtain value for money through robust procurement strategies and processes aligned with key DFID policies such as pro-poor growth and labour standards. D organisations and suppliers who embrace our values and demonstrate Corporate Social Responsibility (CSR) by taking account of economic, social and environmental factors. We encounted the social responsibility (CSR) by taking account of economic, social and environmental factors. the International Labour Organisation (ILO) standards.

## **Opportunities**





## 4. DFID Supplier Portal



#### 8194: The Kenya Jobs for Youth Programme

Return to Bulletin Board

If you wish to participate in this tender, please log onto the system to see if you are eligible.

#### **Tender Notice**

Contract Ref 8194

Title The Kenya Jobs for Youth Programme

Description

The UK will provide up to £5M over 3 years to support an innovative, market-led youth employment programme that seeks to improve economic opportunities for youth in Kenya. Through a flexible fund facility, the programme will test innovative projects that show potential for large-scale impact in creating new productive jobs for young men and women, with the ambition that proven concepts will be scaled-up either by DFID under a subsequent business case, or by other stakeholders. High-potential projects will be selected under three categories, and awarded an initial grant of up to £100,000 each over 9 – 12 months. Projects that show positive progress will be awarded a second round of grant to further demonstrate sustained potential. DFID Kenya will hire a fund manager to support implementation of the programme including pre-screening calls for proposals, as well as offering coordination and M&E support.

**Extension Terms** 

Response Required By Do 28 Februar 2019 at 12:00

Nature of Contract Contract

Contract Start Date Sa 01 September 2018

Contract End Date

Contract Duration 36

(months)

For further information please contact:

Contact Andrew West (Procurement )

Phone 843 3449

Email andrew-west@dfid.gsx.gov.uk

Address Abercrombie HouseEaglesham Road, , , , G75 8EA



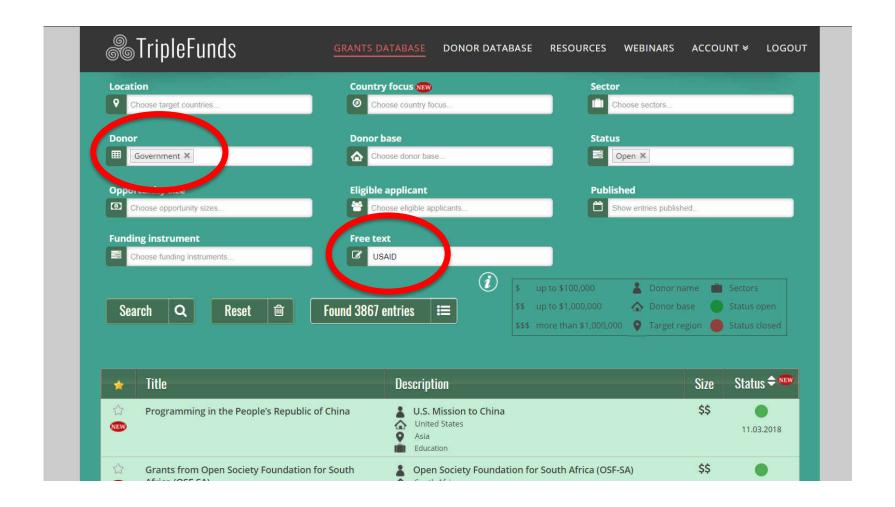
## **Registration in the DFID Supplier Portal**



Progress	Add Category				
Start General	Search for Categories	Search for Categories by entering a keyword and select Search. Put a tick against each Category you wish to add and select Save.			
Addresses		Add			
Countries				( <u>)</u>	
→ Categories			Keyword		
Questionnaires					
Other Docs				Search	
Financials				Search Results	
Finish					
	Code C	Title CATEGORIES			
Links	CONGOV	Consultancy Services (As define	ed by central gov)		
	CONS001	Strategy Consultancy			
Home	CONS002				
Help	CONS003 Organisational & Change Management Consultancy				
Logout	CONS004	IT/IS Consultancy			
1323 3 2000 1	CONS005	Property & Construction Consultancy			
	CONS006	Procurement Consultancy			
	CONS007	Legal Consultancy			
	CONS008	Marketing & Communications Consultancy			
	CONS009	Human Resource, Training & Education Consultancy			
	CONS010	Programme & Project Management Consultancy			
	CONS011	Technical Consultancy			
	CS	CORPORATE SERVICES			
	CS001	Strategic, Business and Organisation Consultancy Services			
	CS002	Programme and Project Management Consultancy Services			
	CS003	Human Resources Consultancy Services			
	CS004	Procurement Services/Procurement Consultancy Services			
	CS005	Environmental Consultancy Services			
	CS006	Information Services			
	CS007	Marketing and Market Research Services			
	CS007A	Quantitative Market Research			
	CS008	Conferences, Seminars and Meeting/Event Services			
	CS009	Accountancy and Financial Service	es		



## Where to find USAID and DFID calls in the TripleFunds database?





# Today's agenda

## 1. Whom are we dealing with?

Overview and comparison of USAID and DFID

# 2. How does the application process work?

Application procedures, guidelines and templates

# 3. Tips & tricks for accessing their funds

Our lessons learned from successful applications



## **Recommendations from our experience**

## A. Preparation phase

- Prepare well in advance
- Study guidelines well
- Make sure you are eligible
- Submit written questions within deadline
- Contact only those persons mentioned in the solicitation
- Project outline must fit the call 110%
- Dedicate balanced team to proposal preparation (i.e. program department, finance, PR)
- Develop roadmap with deadlines and deliverables
- Have a strong implementing team
- Consider having additional partners to cover expertise
- Make yourself familiar with submission mode (i.e. online portal)
- Even if not required: develop Logframe or Toc!
- Keep the design simple and not too complex
- How can you contribute to goals of donor ("case of support")
- Do not be overambitious



## **B. Proposal writing**

- Study the order of importance and point of scales or weight
- Follow the format requested
- Typos are a no-go, run spell check
- Use the same terminology as in the guidelines
- Do not leave the budget until the end
- Be sure your cost estimate is competitive
- Have someone responsible for editing your application
- Prepare supporting material in time (i.e. support letters from local authorities, audit reports, CVs, work plan, organogram)
- Adhere to page limits
- Include list of acronyms
- Include table of content





## **B. Proposal writing (ctd)**

- Write executive summary in the end
- Select suitable past performance samples (i.e. programmatic content, funding size)
- Define key achievements with measurable indicators
- Consider and explain linkages (i.e. local structures, SDGs, other donor funded activities in the country, within own organization) – avoid duplications!
- Come up with clear Value for Money examples (i.e. quantified costing samples, procurement rules)
- Ensure all elements are equal
- Show your evidence from previous projects

## C. Submission

- Create a checklist of key items, review it and then check them off
- Do not miss deadline
- Submit well in time
- Consider technical problems when uploading information to submission portals (i.e. Internet connectivity, high traffic)
- Follow exactly mode of submission: e-mail, online portal



### D. Post-Submission

- Study your evaluation criteria
- Use opportunity to ask for detailed feedback (i.e. UK Aid Direct)
- Learn from your mistakes
- Make a list of what needs to be improved
- Share and discuss within team
- Get external professional assistance
- Make use of training opportunities (i.e. online modules, in-house)
- Evaluate your submission figures and set targets
- Do not forget that acquisition needs ample time and resources
- And overall: never give up!



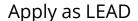


## Now you know more about:

- The sector priorities
- The country focus
- The organisational requirements
- The funding types and volumes
- Their application requirements
- The application procedures

## So you can make a sound decision:







Piggy back



Learn and apply later



DEAR KRISTA

YOU ARE MAGIC!

GOOD CK!

XOXO ALICE





## THANK YOU!

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