Webinar 2. Information sources and databases.

Equalising opportunities for the less developed regions of Armenia due to implementation of development projects, Webinar 2, 22.04.2022
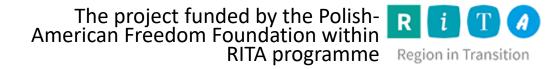
Content

- Types of funding opportunities

- Sources of information and databases with calls.

- Documentation analysis

Types of funding opportunities

Grant Financing

- A grant is a financial donation awarded by the contracting authority to a grant beneficiary. Donors use grants, to support specific projects or operations that are in line with their objectives.

- Donors such as the European Commission advertise grant opportunities through Calls for Proposals (CFP).

- A grant is often awarded based on a proposal made by an applicant to the contracting authority.

Tenders

- Tenders are formal; procurement processes carried out to identify the most suitable suppliers of services, works and or supplies/equipment.

- The tendering process is a structured process, to be fair and transparent, including a stringent selection process, expressions of interest from bidders, through to the request for tender and the evaluation process.

- An invitation to tender is a written request sent out to potential tenderers.

Information Sources and Databases

- Finding relevant funding opportunities is crucial for success.

- You should have a list of target organizations that you monitor regularly to find possible opportunities.

- There are also several sources that can be used for finding current and future funding opportunities.

- Registering with information service providing websites can be another way monitor available opportunities.
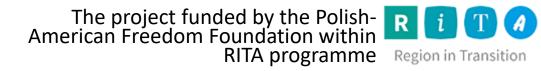
Information Sources and Databases

Databases with Calls	Main donors of Community development programmes
EU Funding and Tenders Portal	
EPICOS, www.epicos.com	EU
TED e-Tendering, www.etendering.ted.europa.eu	World Bank
Eastern Europe Energy Efficiency and Environment Partnership, www.e5p.eu	USAID
SIGMA, www.sigmaweb.org	UNDP
Black Sea CBC, www.blacksea-cbc.net	ADB
Covenant of Mayors East, www.com-east.eu	GIZ
ARMACAD, www.armacad.info	
ARMEPS, www.armeps.am	

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Information Sources and Databases

- **TED eTendering -** is an EU institutions' eProcurement platform based on EU Directives on public procurement. Allowing free electronic access to call for tenders' documents such as contractual documentation, technical specifications, annexes, questions and answers etc.

- **Eastern Europe Energy Efficiency and Environment Partnership -** E5P is a multi-donor fund to encourage municipal investments in energy efficiency and environmental projects in the Eastern Partnership region.

- **SIGMA** (Support for Improvement in Governance and Management) is a joint initiative of the OECD and the European Union. Its key objective is to strengthen the foundations for improved public governance, and hence support socio-economic development.

Information Sources and Databases

- **Black Sea CBC** (Cross Border Cooperation) is a Programme funded by the European Union in the framework of European Neighbourhood Instrument (ENI). The regions or countries form the eligible area of the Black Sea Programme: **Bulgaria**, **Greece, Romania, Turkey, Ukraine, Armenia, Georgia, Moldova.**

- **Covenant of Mayors East - CoM East** is the EU-funded project aimed at introducing the EU climate and energy initiative to the Eastern Partnership countries. CoM East supports local authorities in implementing sustainable energy policies, improving the security of energy supply, and facilities their contribution to climate change mitigation and adaptation.

- **ARMACAD** is a platform for academic centers to present scholarships, conferences, grants and study opportunities to international audience.

- **ARMEPS** (E-public procurement system) is a platform to access government tenders, where you can subscribe and receive regular updates.

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Documentation analysis – RFPs and Invitations to Tenders

The Request for Proposal (RFP) or call for proposal includes all the information needed to submit a proposal and therefore it should be read with extreme care.

The needs of the tenderee (the authority issuing the Tender) are reflected in the tender documents, also referred to as invitations to tender, Requests for Tender (RFT). An Invitation to tender can consist of the following parts:

- Tender Conditions (including evaluation criteria);

- Tender Particulars (closing time and date, description of information only documents, the name and contract details of the tender administrator, briefing times etc);

- Tender Form to be submitted by the tenderer with its tender which requires the tenderer to acknowledge and agree that, for example, the tender will remain valid for a set period and that if the Tender is accepted, the tenderer will immediately commence the work as well as other warranties and acknowledgments.

- Tender Schedules (including schedules in which tenderers are required to provide details of their workload and resources, project and safety plans, work history, program, insurance details, contract price, any required amendments to the proposed Contract etc.);

- Contract (proposed form of final Contract).

Documentation analysis - Terms of Reference

- The Terms of Reference (TOR) are usually a critical part of tender documents and or CFPs.

- The ToR defines the tasks and duties required of a project contractor/applicant, and highlights project background and objectives at high level. It also states the planned activities, expected inputs and outputs, project budget, working schedules, and job descriptions.

- The ToR is also a governance document that establishes and determines the relationships between all project stakeholders.

- A generic content format of Project Terms of Reference can be as follows:
  - Project Background
  - Project Objectives
  - Issues to be explored and analysed against certain criteria
  - Implementation Methodology to be applied
  - Expertise required
  - Reporting requirements
  - Work plan, including activity schedules
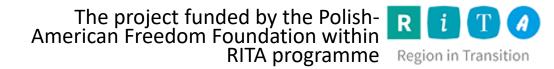
Documentation analysis - Terms of Reference

1. Project Background - The background of a project provides an overview of the history behind the project. It should clearly state why perform the project and refer to a programming context.

2. Project Objectives - Thproject objectives are those desired accomplishments that can be reasonably delivered upon project completion. They should clearly identify and define what is expected from the project and who the target audience is.

3. Issues - Any project involves a number of issues and problematic areas that must be addressed in order for the project to be implemented smoothly. The issues cover any concern, query, request for change, or anything else that requires a resolution during the project.

Documentation analysis - Terms of Reference

4. Methodology - The implementation methodology of a project provides a set of broad principles and rules and describes the main methods of project implementation.
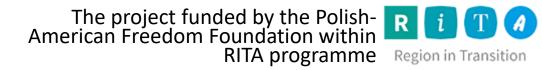
5. Expertise - The expertise needed defines a set of professional requirements for the individuals and teams involved in project implementation.

6. Reporting - Reports provide information about project performance over a certain period. Reporting is a process that starts once a project is launched and continues until the project is completed. Reporting requirements define how to write and submit project reports and what information to include

7. Work Plan - A work plan is a kind of strategy that aims to help solve problems throughout a project and boost employee drive and focus. It determines what actions need to be taken to start, implement, and complete the project within a specified time period.

Documentation analysis - Contract template

A contract is a legally binding agreement between two or more parties who agree to buy or sell goods and services from one another. There are many different types of contracts. The three most common contract types include:

- Fixed-price contracts

- Cost-plus contracts

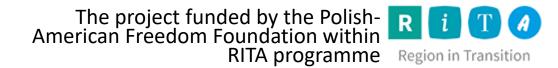- Time and materials contracts

Documentation analysis - Contract template

- **Fixed-price contracts**, also known as firm-price or lump-sum contracts, are agreements in which the two parties state the goods or services one party will provide and establish the price the other party will pay for them.

- **Cost-plus contracts**, sometimes referred to as cost reimbursement contracts. Under a cost-plus contract, the buyer reimburses the seller for the actual costs incurred, plus an additional amount for managing the project and profit — that's the "plus" in "cost-plus."

- **A time and materials contract** is great for buyers who don't necessarily know what they want when they begin their project. For example, a time and materials contract works well for software developers hired to create an app for a company that is unsure about what the app needs to do.
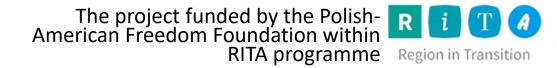
Documentation analysis – Other Tamplates

- **Declarations on honor -** A Declaration on honour informs on the legal status and operational and financial capacity of your organisation. It is to be completed and signed by the legally authorised individual on behalf of the applicant organisation.

- **Financial statements -** Are written records that convey your financial activities and performance. Examples of such statements are:

- The balance sheet provides an overview of assets, liabilities, and stockholders' equity as a snapshot in time.

- The income statement primarily focuses on a organisations revenues and expenses during a particular period. Once expenses are subtracted from revenues, the statement produces a company's profit figure called net income.

- The cash flow statement (CFS) measures how well a company generates cash to pay its debt obligations, fund its operating expenses, and fund investments.

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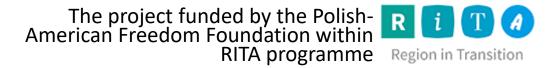Region in Transition

Evaluation Process

- Once you have submitted your application, the contracting authority will review your proposal, financial and quality elements against the selection criteria, alongside the submissions of your competitors to short list.

- Each tender and or CFP initially will be assessed to determine if it complies with all requirements of the tender document. If the applicant tender does not meet this initial check, it will be excluded from further consideration.

Technical evaluation criteria	Max. Points
Quality of the proposal	**30**
Previous relevant experience	**15**
Capacity to deliver the requested service	**20**
Total technical score	**65**

Only proposals which receive a minimum of 45 points will be considered further.

Preparation of your application

- Applications come in many shapes and sizes depending on what you are applying for.

- Some of the opportunities have two stages where initially you need to apply with a small concept note and if successful you are invited to submit a full proposal which often is much more extensive.

- Moreover, in case of some of the donors such as the EU it is necessary to register your organisation in an online database prior to application. In this regard, in order to apply for EU grant opportunities it is often necessary to before register in the Potential Applicant Data On-Line Registration (PADOR) platform and later submit your application online through in PROSPECT.