

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

**PROJECT MANAGEMENT ASSOCIATE (PMA) COURSE**  
**Call for Fellowships Rules**

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## 1. BACKGROUND

In 2011, the Inter-American Development Bank (IDB) through INDES<sup>1</sup> 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 fruition 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. OBJECTIVE OF THE CIVIL SOCIETY INSTITUTIONAL CAPACITY PROGRAM (PM4R/CIVIL SOCIETY)

To increase human capital in order 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 annual cycle (the call schedule will be periodically updated at <https://wiconnect3.iadb.org/en/>; [www.iadb.org/civilsociety](http://www.iadb.org/civilsociety); and [www.iadb.org/sociedadcivil](http://www.iadb.org/sociedadcivil)).

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<sup>1</sup> 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.

**4. TARGET AUDIENCE**

Civil Society Organizations from IDB borrowing member countries (whether belonging to Civil Society Consulting Groups ConSoC or not).

**5. CLASSES/TRAINING**

- 1- *Maximum number of CSOs per class:* Each class will enroll a maximum of seven (7) organizations representing up to 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- *Maximum number of participants per class:* Each class will enroll a maximum of thirty-five (35) participants.
- 3- *Minimum and maximum number of participants per organization:* Each organization will present a minimum of 4 and a maximum of 6 members directly involved in the management of the selected project (see selection criteria below).
- 4- *Maximum number of projects submitted per organization:* Each organization may submit one project per contest that all participants of the organization will use as a case study. It is not mandatory that the project be financed and/or co-executed by the IDB. There is no limit to the number of CSOs from the same country that wish to apply. Incomplete applications will be dismissed.

**6. CHARACTERISTICS OF THE COURSE**

- 1- *Delivery method:* The PMA course will be delivered as 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) 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 minimum of four (4) and maximum of six (6) participants: Each organization may enroll between 4 and 6 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<sup>2</sup> 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<sup>3</sup> 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. 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 up to 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.

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<sup>2</sup> 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.

<sup>3</sup> If the project selected is financed by the Bank, the relevant Bank department or division will be duly notified.

- 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.
- 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. *Submittal of applications.* Candidates must deliver or submit their duly completed applications (following the specific forms provided) by the time frames established.

At the behest of each Country Office, videoconferences may be organized in order to clarify doubts and answer questions up to one week before the closure of applications.

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”).

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.

**Wiconnect3.** All participants may enhance the visibility of their organizations and publicize the results obtained both inside and outside the training in the new platform Wiconnect3 (<https://wiconnect3.iadb.org/>).

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>.