



GLOBAL
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Connecting the World through Learning

The Project Intake Conversation

Getting to the Client Perspective

Why do clients come to an intake?





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Selling “GDLN” is a great idea.





But intake conversations are not about selling.





Intake conversations are about understanding.

for who?

what for?

what?

by who?

in what context?

when?

how?

where?

for how long?

who does what?

measured how?

for how much?



1

Context

Background information critical to understand the context in which the proposed deliverable/activity is to take place.

- What are the broader country/sector priorities?
- What are the key development issues to be addressed?
- How has demand been articulated?
- Were there past involvements of key stakeholders and if so, how did these involvements yield results?



2

Program objectives

- What does the deliverable/activity aim to achieve?
- Describe what would be different as a result of the activity Consider capacity factors such as
 1. Strength of stakeholder ownership,
 2. Efficiency of policy instruments, and
 3. Effectiveness of organizational arrangements. If institutional capacity is to be improved, describe envisioned institutional change process.



Audience and knowledge gaps

3

- Who will benefit from the activity?
- Will the participants be final beneficiaries or change agents of a process?
- What are the main knowledge gaps that need to be addressed?
- In what way will new knowledge contribute to their roles (e.g. altered processes & relationships, or new products & services).
- Which countries to be targeted on the supply and demand side or have interest in reciprocal learning.



4

Tangible outcomes and success indicators

Describe tangible outcomes of the activities/
deliverables and how you intend to measure them.

- What are indicators of success?
- What was the situation in the development environment of interest before the capacity development intervention?
- What was the situation after the intervention?
- What connections can be documented between the intervention and the change observed?



5

Knowledge source(s)

- Which knowledge sources the activity/deliverable can we draw on and which ones need to be identified?

6

Documentation of learning and outcomes

- Is there need to document learning and how the learning and concrete outcomes were achieved?



7

Time frame

By when do you need to have to achieve the objectives?

8

Budget

Indicate what budget is available/required to implement the deliverables/activities.

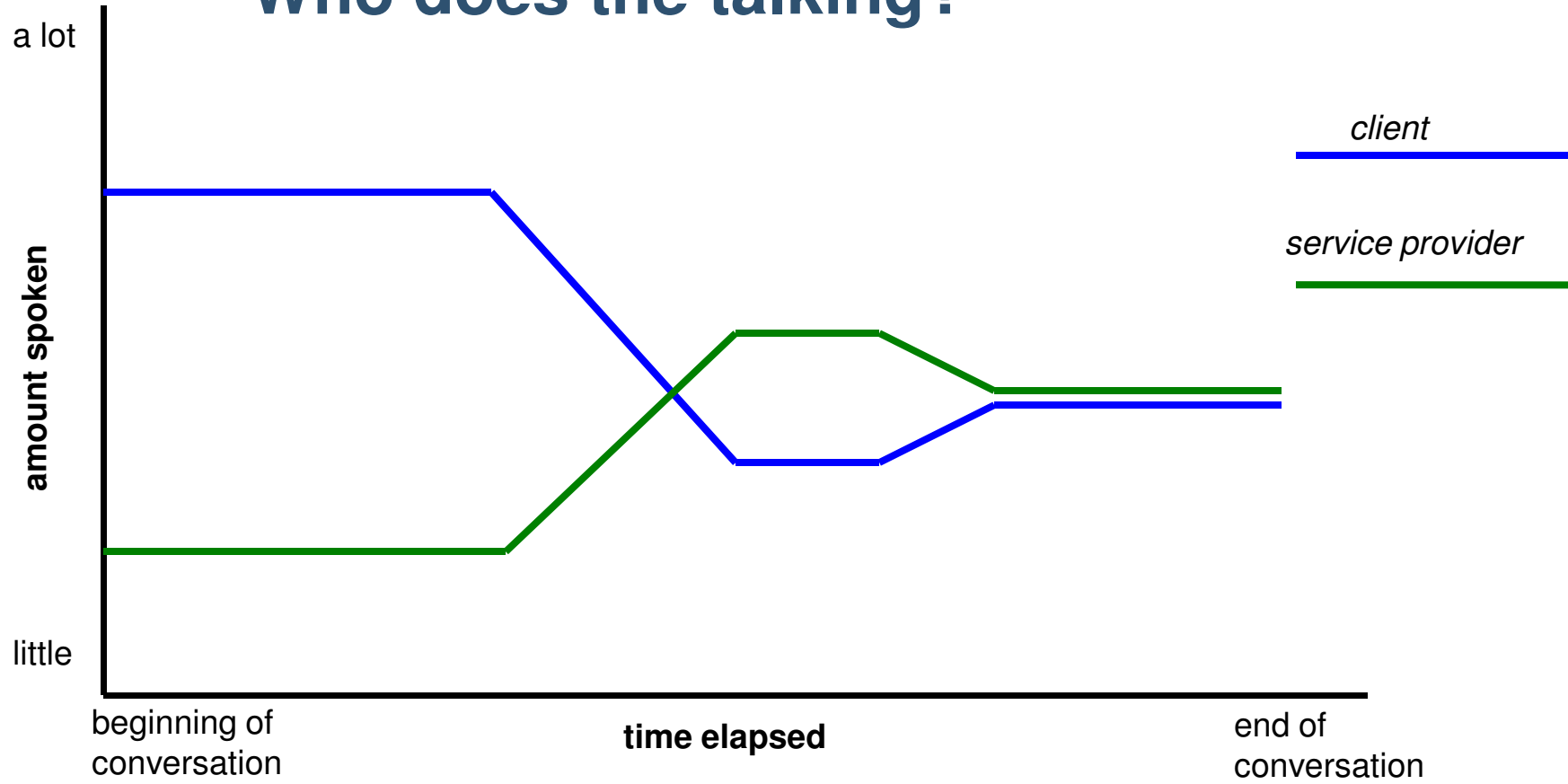
9

Next steps

List immediate next steps for follow up, who will be in charge and by when they need to be completed.



Who does the talking?



beginning
“listen” – listen to the problem and ask questions

middle
“suggest” – identify opportunities and formulate solutions

end
“converge” – wrap up and plan next steps

Brainstorm together.





One more thing: Which tools come to mind?





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Which tools come to mind?



A One-stop-shop for capacity development

Tailor made services
along the entire
spectrum of the
capacity development
cycle





The proposal

*After the intake
you should have enough
information to write a proposal.*





The Proposal

Why

Is the proposed set of activities relevant?

- Give quick description of the background to this activity (usually provided in the ToR)

What

Is expected to be achieved?

- Outline the main goals to be achieved and objectives of activities.
- Give an indication of what success would look like and how this could be measured.



The Proposal

What

Proposed set of activities/deliverables (scope)

- List all proposed related activities under the initiative/program and how they address the identified knowledge gaps.
- Highlight and explain linkages between the respective activities.
- Explain how the activities/deliverables contribute towards sustainable results
- Consider integrating deliverables/activities that facilitate concrete follow up and/or medium- to long-term engagement by participants.



The Proposal

Who

will be targeted and what will be achieved?

- List type of participants/institutions/ countries to be targeted and how they will benefit from the proposed activities.

When

will we deliver the activities/products?

- Outline a timeline with milestones and deliverables



The Proposal

Who

will do what?

- Give an overview of roles and responsibilities to clarify who will contribute to ensure timely delivery of products and services. Possibly outline next/immediate steps.

How much

will this cost?

- Provide costing information for each deliverable.