

Detailed Advertisement for NABARD's website

**NOTICE INVITING LETTERS FOR EXPRESSION OF INTEREST (EOI)
for conducting "NABARD All India Rural Financial Inclusion Survey"**

EOI Ref: NABARD Financial Inclusion Survey- 2015-16, Aug 2015

National Bank for Agriculture and Rural Development (NABARD) invites letters for Expression of Interest (EOI) from eligible agencies to submit their interest for conducting "NABARD All India Rural Financial Inclusion Survey".

"Conducting survey for Rural financial inclusion"

This invitation for Expression of Interest (EOI) is being invited for short listing eligible agencies to issue Request for Proposal (RfP) for carrying out the above mentioned survey for NABARD. The agency should possess the required infrastructure, methodology & technology, personnel with relevant qualifications and experience to provide the logistic support and services for execution of the above mentioned Project for NABARD.

Contract would be awarded through Two Part Bidding Process from among the agencies shortlisted on the basis of the EOI Parameters and the Request for Proposal.

The response to this EOI is to be submitted in **Original + one copy**.

Eoi must be delivered duly completed, in a written form, at the address mentioned in EOI, in sealed covers and superscripted with "Expression of Interest to conduct NABARD All India Rural Financial Inclusion Survey" latest by **1700 hours on 24 September 2015**. Soft copy may also be sent to nafis@nabard.org and nabnafis@gmail.com latest by **24 September 2015**.

Only the shortlisted agencies based on the criteria listed in this Eoi shall be informed by NABARD for purchase of Request for Proposal (RfP) and submission of detailed Proposal for such Survey.

Interested agencies are requested to submit their EOI in the prescribed format along with all supporting documents/ credentials.

The EOI containing survey requirement, selection criteria, application forms, etc. are given in Annexure I.

Last date of submission of EOI: up to 1700 hours on 24 September 2015 at the address given below:

The Chief General Manager,
Department of Economic Analysis and Research (DEAR),
4-C, NABARD, Bandra Kurla Complex, Bandra (East)
Mumbai – 400 051.

E-mail : nafis@nabard.org (Primary)
nabnafis@gmail.com (Secondary)

Expression of Interest

Shortlisting of Agencies

for conducting

“Rural Financial Inclusion Survey”



**NATIONAL BANK FOR AGRICULTURE
AND RURAL DEVELOPMENT**

The Chief General Manager, Department of Economic Analysis and Research
(DEAR), 4-C, NABARD, Bandra Kurla Complex, Bandra (East) Mumbai – 400 051.

nafis@nabard.org

nabnafis@gmail.com

1. Introduction

1.1 National Bank for Agriculture and Rural Development (NABARD) was established on 12 July 1982 by an Act of the Parliament to promote sustainable and equitable agriculture and rural prosperity through effective credit support, related services, institutional development and other innovative initiatives. NABARD, as a part of its mandate, is taking various initiatives for financial inclusion.

1.2 NABARD proposes to conduct Rural Financial Inclusion Survey covering all States of the country to capture the financial inclusion related aspects at the grassroots levels. Eligible agencies may send their Expression of Interest (EOI) to undertake the survey. The shortlisted agencies would be called for a pre-bid meeting to appraise the proposed survey details, key questions, term of reference (ToR), and list of indicators.

1.3 Thereafter the Request for Proposal would be issued for short - listed agencies based on which the final selection would be done.

1.4 The final selection of the agency will be in two stages. In first stage, NABARD will scrutiny the technical bids. In the second stage, the financial bids of those agencies which qualify in the first stage will be evaluated.

2. Purpose

2.1 The purpose of this Expression of Interest is to shortlist reputed agencies for conducting "Rural Financial Inclusion Survey" on a TURNKEY BASIS. The objective of this document is to provide indicative information about the scope and objective of this activity. The detailed terms and conditions and parameters for selection of the bidding organization will be provided in the Request for Proposal (RfP), which will be provided to only agency(ies) shortlisted as per the selection parameters provided in this EOI document.

2.2 The selected agency will be entering MoU with NABARD and will be responsible for the successful completion of the survey and its quality.

3. The Proposal :

The survey is comprising the following points :

3.1 **Coverage:** Financial Inclusion related aspects. Approximately the survey will be covering around 40,000 rural households from 29 states of the country.

3.2 **Frequency:** The survey is likely to be repeated periodically. The current proposal is for first survey in 2015-16.

3.4 Timeframe: The survey will have to be completed within 6 months of signing the MoU.

3.5 Broad aspects to be covered

- Asset base and other farm HH characteristics
- HH expenditure on Production and consumption, etc
- Financial inclusion covering credit, savings, insurance, remittances, payments and pensions
- Availability of credit – incidence of indebtedness, loan amount – flow and stock, agencies, terms of credit, cost of credit, etc.
- Use of credit – production and capital formation in agriculture and allied sectors
- Microfinance related information

Detailed list of indicators is given in Annexure I. The list is tentative

4. Critical Information

4.1 Applicants are advised to study this EOI document carefully before submitting their proposals in response to the EOI Notice. Submission of a proposal in response to this notice shall be deemed to have been done after careful study and examination of this document with full understanding of its terms, conditions and implications.

4.2 Applicants are requested to attend a pre-proposal briefing meeting if any, as per details provided below:

| Sr.No. | Information | Details |
|--------|---|--|
| 1 | EOI No. and Date | EOI Ref: NABARD / Financial Inclusion Survey - 2015-16, August 2015. |
| 2 | Last date for submission of written queries for clarifications | 28th August 2015 till 17.00 pm The Chief General Manager, Department of Economic Analysis and Research (DEAR), 4-C, NABARD, Bandra Kurla Complex, Bandra (East) Mumbai – 400 051. e-Mail ID: nafis@nabard.com and nabnafis@gmail.com . |
| 3 | Date of pre-proposal briefing | 7 th September 2015 at 02.00 pm |
| 4 | Release of response to clarifications on www.nabard.org | 11 th September 2015 |
| 5 | Last date (deadline) for submission of EOI Proposal | 24 th September 2015 till 03.00 pm |
| 6 | Addressee and Address at which proposal in response to EOI notice is to be submitted | The Chief General Manager, Department of Economic Analysis and Research (DEAR), 4-C, NABARD, Bandra Kurla Complex, Bandra (East) Mumbai – 400 051. Primary : nafis@nabard.org |

| | | |
|---|----------------------------|---|
| | | Secondary : nabnafis@gmail.com |
| 7 | Opening of Received /EOI | 28 th September 2015 at 10.30 AM in the Office of CGM, DEAR, NABARD, Mumbai. |
| 8 | Shortlisting of Applicants | Will be intimated later |
| 9 | Floating of RFP | Will be intimated later |

5. Scope of Work

5.1 The sample size and indicators listed are tentative and will be fine-tuned before launching the survey. The agency will be responsible for preparing the set of questionnaires and other survey instruments, preparation of dummy tables and reports and recruiting and training field staff.

5.2 The deliverables will be the data set in user-friendly format, key results and reports on various aspects.

5.3 Detailed Indicators to be covered :

A. Livelihood related

- Socio economic profile
 - Social status
 - Demographic profile including literacy
 - Occupation status
- Activity profile
 - Enterprise mix
 - Resource use – from own sources or from borrowing?
 - Returns – marketing arrangements, price realization, etc
- Access to amenities
 - Distance to Nearest outlet
 - Access to Post office, bank, revenue office, connectivity, market, etc

B. Financial inclusion related

Savings

- Awareness about importance of Saving
- Savings per household in various time zone
- Use of Banking system for saving.
- Savings through informal groups.
- Number of Bank accounts in each households.
- Bank accounts across gender and age groups.
- Frequency of transaction through bank accounts
- Use of ATMs for banking transaction

Credit

- % marginal and small farmers availing institutional credit
- per ha Agri credit availed and o/s

- Level of indebtedness – amount of debt per HH
- KCCs per 1000 farm HH
- Availability of formal credit – source-wise – formal and informal - including MFIs, SHGs, JLGs, etc.
- Quantum of credit availed by the household –source-wise and activity
- Deployment – utilization of credit availed
- Source of credit – formal / informal/Banks/MFIs
- Terms of credit – interest and non-interest
- Nature of credit availed
- Reasons for not availing credit facilities
- HH's perception about banking services

Microfinance progress

- SHG/JLG penetration per lakh (relevant) population/area,
- SHG saving or loan linked,
- loan/SHG,
- savings/SHG

Multiple membership and loans from SHG/JLGs

Payments & Remittance

- Awareness about payments and remittance through different channels – banking and non-banking – incl post-offices and also informal channels
- Usage of cheque for payment
- Usage of electronic payments
- Usage of mobile for payments
- Frequency of use of such payment & remittance services

Insurance and Pension

- Awareness about insurance
- Coverage of insurance
- Nature of insurance
- Insurance premium- self contribution/subsidized
- Coverage under pension schemes- those under social security and voluntary
- Reasons for not availing insurance

Financial Literacy

- The level of financial literacy of the target group.
- Level of penetration of financial literacy efforts of various stakeholders viz. FLCs, CBs, Coops. RRBs etc.
- Use of mobile banking and internet banking

Ease of getting banking services

- Whether banking services are available in a non-intimidating manner.
- Geographical proximity with banking point, BC/BF or brick & mortar.
- Is distance not a discouraging factor?
- Average time spent on availing one banking service i.e. opening of a/c, availing loan etc.

6. Eligibility Criteria

The agencies to be short listed for issue of RfP has to fulfil following conditions:

6.1 Only registered Agency / Academic Institution/ Policy Research Institute/ Registered Society engaged in Research are eligible to apply.

6.2 The institution/organization should have been in existence for a period of at least 5 years on the date of the application.

6.3 The Agencies / institutions / organisations should have prior experience in handling large scale surveys of the magnitude similar to the proposed nation-wide Financial Inclusion Survey and should submit the details.

6.4 Since the survey is **likely to be** repeated every three years the agency should be a long term player in the market and should have proven capability and necessary infrastructure.

6.5 Agency should be able to provide a performance guarantee to the extent of 5% of the bid amount valid till the satisfactory completion of the assignment.

6.6 The agency should preferably have permanent qualified core staff on their rolls.

7. Timeline

7.1 The Rural Financial Inclusion Survey should be completed in all respects within 6 months from the date of signing of MoU.

8. Geographical Coverage of the Survey

8.1 All India Tier 3 to Tier 6 centres i.e. with population < 50000 as per RBI classification across 29 States.

9. Approach Paper for Expression of Interest

The agency is required to submit an Approach paper of a Maximum of five A4 pages keeping the valuation criteria in mind, as per details given below:

9.1 **Approach and Methodology**: In this section the agency shall explain their understanding of the objectives of the survey, approach and methodology for carrying out the survey activities (survey schedules, activity and manpower plan as also the time line) and obtaining the expected output. Expertise and organizational experience in the area of survey is required to be mentioned as well as organizational experience in dealing with survey work for Government/ Public Sector, if any.

9.2 **Human Resources**: The agency shall provide details of the dedicated project team – their individual roles and responsibilities in the project, their relevant

experience. At a minimum, the team must be composed of a dedicated Project Manager, Statisticians, Field Survey Managers and Data Analyst and Report writing expert. The agency may also give detailed plan of engaging field force.

10. Payment terms and Conditions

10.1 It is proposed to enter into a deliverables based payment with the Agency/ies selected after the completion of RFP process. The details regarding the same will be provided in the RFP.

11. Supporting Proofs and Documents

11.1 Details/copy of the registration.

11.2 Latest balance sheet.

11.3 Evidences of previous experiences with large mode Survey and other related project/work.

11.4 value of a project(s) handled in similar field in last three years, if any.

11.5 Proposed Team for the study and plan for field force.

11.6 Curriculum vitae (CV) of key professionals on roll of the agency proposed to be included in the study/survey

11.7 Signed consent of the key professionals mentioned as mentioned above.

11.8 Details of infrastructure and facilities to be used for the assignment.

12. Completeness of Response

12.1 The Agency is advised to study all instructions, forms, requirements and other information in the EOI documents carefully. Submission of the EOI shall be deemed to have been done after careful study and examination of the EOI document with full understanding of its implications.

12.2 The response to this EOI should be full and complete in all respects. Failure to furnish all information required by the EOI documents or submission of a proposal not substantially responsive to this document will be at the Applicant's risk and may result in rejection of its Proposal.

13. EOI Proposal Preparation Costs & Related Issues

13.1 The agency is responsible for all costs incurred in connection with participation in this process, including, but not limited to, costs incurred in conduct of informative and other diligence activities, participation in meetings / discussions /presentations, preparation of proposal, in providing any additional information required by NABARD to facilitate the evaluation process. NABARD will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the EOI process.

13.2 This EOI does not commit NABARD to issue RfP or award a contract or to engage in negotiations. Further, no reimbursable cost may be incurred in anticipation of award or for preparing this EOI.

13.3 All materials submitted by the agencies will become the property of NABARD and may be returned completely at its sole discretion.

13.4 The assessment studies, collected data in both raw as well as processed format, data analysis, reports, case studies and any other intellectual property/deliverable prepared and submitted by the agency in relation to the Project shall be and remain the property of NABARD, and NABARD shall be the sole owner of all intellectual property rights in such deliverables. The information as mentioned above shall not be disclosed by the agency to others except with prior written permission of NABARD. The agency should indemnify NABARD for any loss, costs, expenses incurred or suffered by NABARD due to disclosure of such information without the consent or permission of NABARD.

13.5 The Agencies shall deliver all the documents/deliverables both in hand and soft forms to NABARD, together with a detailed inventory thereof, prior to termination or expiration of the project/Survey. The Agency shall not use these documents for any purpose other than related to the project without the prior written approval from NABARD.

14. Queries

14.1 All queries may be sent to the Nodal Officer of NABARD specified before only by email on or before 28th of August 2015 till 17.00 A.M.

14.2 NABARD hold a pre-bid briefing meeting with the Agency to clarify the queries required in respect of the EOI. The Agency will have to send their queries for Pre-Bid meeting by only email containing subject line : **NAFIS: Pre-bid queries.**

14.3 All queries to be raised at the EOI stage will relate to the EOI alone and no queries related to detailed analysis of Scope of work, payment terms and mode of selection will be entertained. These issues would be clarified at the RFP stage.

14.4 All enquiries / clarifications from the Agency, related to this EOI, must be directed exclusively to the contact person notified in this EOI document.

14.5 The preferred mode of delivering written questions to the aforementioned contact person would be through e-mail. Telephone calls will not be accepted. In no event will NABARD be responsible for ensuring that Applicants' inquiries have been

received by NABARD. The queries by the applicants will be provided in the following format.

| Sr No. | Page | Section | Sub Section | Details | Clause of the EOI on which Clarification required | Clarification Required |
|--------|------|---------|-------------|---------|---|------------------------|
| | | | | | | |
| | | | | | | |

14.6 At any time prior to the last date for receipt of EOI, NABARD may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective applicant, modify the EOI Document by a corrigendum.

14.7 The Corrigendum (if any) & clarifications to the queries from all applicants will be posted online at the www.nabard.org

14.8 Any such corrigendum shall be deemed to be incorporated into this EOI.

14.9 In order to provide prospective applicants reasonable time for taking the corrigendum into account, NABARD may, at its discretion, extend the last date for the receipt of EOI Proposals.

15. NABARD's Right to Terminate the Process

15.1 NABARD may terminate the EOI process at any time and without assigning any reason. NABARD makes no commitments, express or implied, that this process will result in a business transaction with anyone.

15.2 This EOI does not constitute an offer by NABARD. The applicant's participation in this process may result subject to satisfying other criteria in short listing the institutions / organisations.

15.3 Any lobbying and approaching NABARD officers and the consultants/experts employed by NABARD will disqualify the agency in question.

15.4 The entire or part of the survey works should not be subcontracted to other agencies after signing the MoU with NABARD except engaging staff on contract basis who can work under the guidance of core staff of the agency. The staff on contract basis shall, in no circumstances, be deemed to be the employees of NABARD. The agency shall comply with all laws and permissions, issued by various authorities for carrying out such work and keep NABARD indemnify against any loss, costs or expenses incurred by it for no-compliance by the selected agency.

15.5 The agency will be responsible for developing the survey instruments and dummy tables report formats in consultation with NABARD.

16. Submission of Responses

16.1 The application shall be submitted in a single sealed envelope and superscribed “Expression of Interest to conduct NABARD All India Rural Financial Inclusion Survey” by 24th September 2015. This envelope should contain one hard copy of EOI proposal. Envelope should indicate clearly the name, address, telephone number, e-Mail ID and fax number and website URL of the agency.

16.2 Application shall consist of supporting proofs and documents as defined in the Pre-qualification section.

16.3 Agency shall submit all the required documents as mentioned in the EOI including various templates (*Form 1 to Form 3*). It should be ensured that various formats mentioned in this EOI should be adhered to and no changes in the format should be done.

16.4 The document should be page numbered, must contain the list of contents with page numbers and shall be initialed by the Authorized Representative of the agency on each page.

16.5 EOI document submitted by the agency should be concise and contain only relevant information as required.

17. EOI Submission Format

17.1 The entire proposal shall be strictly as per the format specified in this Invitation for Expression of Interest and any deviation may result in the rejection of the EOI proposal.

18. Venue and Deadline for Submission

18.1 Proposals must be received at the address specified before the scheduled time 24th September 2015 till 05.00 pm.

18.2 Any proposal received by NABARD after 05.00 pm on 24th September 2015 shall be liable to be rejected.

18.3 The EOI submitted by telegram/fax/e-mail only etc. shall not be considered. No correspondence will be entertained on this matter.

18.4 NABARD shall not be responsible for any postal delay or non-receipt/ non-delivery of the documents. No further correspondence on the subject will be entertained.

18.5 NABARD reserves the right to modify and amend any of the above-stipulated condition/criterion depending upon project priorities vis-à-vis urgent commitments.

19. Short listing Criteria

19.1 NABARD will shortlist institutions / organisations based on the EOI through an Evaluation Committee.

19.2 Any attempt by applicant to influence the EOI process may result in the rejection of its EOI Proposal.

20. Evaluation Process

20.1 NABARD will constitute an Evaluation Committee to evaluate the responses of the Applicants.

20.2 The Evaluation Committee constituted by NABARD shall evaluate the responses to the EOI and all supporting documents & documentary evidence. Inability to submit requisite supporting documents or documentary evidence, may lead to rejection of the EOI Proposal. The Committee may seek additional documents as it deems necessary.

20.3 Each of the responses shall be evaluated to validate compliance of the applicant according to the Pre-Qualification criteria, Forms and the supporting documents specified in this document.

20.4 The decision of the Evaluation Committee in the evaluation of responses to the Expression of Interest shall be final. No correspondence will be entertained on the evaluation process of the Committee.

20.5 The Evaluation Committee may ask for presentation / meetings with the applicants to evaluate its suitability for the assignment.

20.6 The Evaluation Committee reserves the right to reject any or all proposals without assigning any reason to the agencies.

20.7 The EOI Proposal will be evaluated based on the documentary evidences provided and, marks will be assigned to the proposal based on the following broad criterion:

| Sr. No. | Particulars | Marks for evaluation |
|---------|--|----------------------|
| i | Agency's Profile | 10% |
| ii | Projects/survey completed by the Applicant – Previous experience | 40% |
| iii | CVs of Professionals to be engaged in the assignment & manpower | 20% |

| | | |
|----|---|-----|
| iv | Methodology & approach of the proposal | 20% |
| V | Infrastructure/Technological competence | 10% |

21. Notification of Short listing

21.1 NABARD shall notify by email and by speed post all applicants that have been shortlisted.

21.2 Only Shortlisted applicants will be issued the Request for Proposal (RFP).

22. Dispute Resolution & Arbitration:

22.1 All disputes arising shall be subject to the jurisdiction of the appropriate court at only in Mumbai and will be governed by the laws of India.

23. EOI Submission forms

23.1 The applicants are expected to respond to the EOI using the forms given in this section and all documents supporting Pre-Qualification / EOI Criteria.

23.2 Proposal / Pre-Qualification application shall comprise of following forms:

Form 1: Covering Letter on Letterhead of the agency with details of the agency's Operations and Business

Form 2: Compliance Sheet for Pre-Qualification Criteria

Form 3: Format for CV of key Professionals to be deployed in the Project (*Separate form will be required for each professional*)

[Form 1: Covering Letter, to be print on the letterhead of the agency]

Details of the agency's Operations and Business

Dated:

To,

The Chief General Manager,
Department of Economic Analysis and Research (DEAR),
4-C, NABARD, Bandra Kurla Complex, Bandra (East)
Mumbai – 400 051

Sub: Expression of Interest for Engagement of an agency to conduct survey for Rural financial inclusion

Sir,

With reference to the Notice Inviting Expression of Interest by National Bank for Agriculture and Rural Development dated _____ for engagement of an agency to work as the National Level Agency for conducting a survey for Rural Financial Inclusion, we wish to express our interest to undertake the work. The details regarding our organization are furnished below, for consideration of NABARD:

| Sr No | Particulars of the agency / organisation / institution | |
|--------------|---|--|
| 1 | Name and full postal address of the Agency | Name: Address: |
| 2 | Contact detail of the head of the agency/institution/organisation | Name: Designation: Phone No: Fax No. E-mail address: |
| 3 | Contact detail of the nodal person for the purpose of this EoI. | Name: Designation: Phone No: Fax No. E-mail address: |
| 4 | Registration Number with Year | |

| 5 | Nature of the organisation e.g. whether registered under Section 25 of the Companies Act, 1956/an autonomous body of the Central /State Government / Academic or Research Institution etc. | | | | | | | | | | | | | | | | | | | | | | |
|--------------|--|---|----------|---------|---------|---|----------------------------|--|---|--------------------------|--|---|-----------------------|--|---|----------------------|--|---|---------------|--|--------------|--|--|
| 6 | Objectives of the organisation (as per statute/Articles of Association etc.) | | | | | | | | | | | | | | | | | | | | | | |
| 7 | Overview of the activities undertaken by the organisation. | | | | | | | | | | | | | | | | | | | | | | |
| 8 | Main fields of work | | | | | | | | | | | | | | | | | | | | | | |
| 9 | Details of Regional/State offices, if any. | | | | | | | | | | | | | | | | | | | | | | |
| 10 | Regular Staff strength of the organisation | <table border="1"> <thead> <tr> <th colspan="3">Category</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Directorial/Administrative</td> <td></td> </tr> <tr> <td>2</td> <td>Academic/Market research</td> <td></td> </tr> <tr> <td>3</td> <td>Key managers personal</td> <td></td> </tr> <tr> <td>4</td> <td>Accounts and Finance</td> <td></td> </tr> <tr> <td>5</td> <td>Support staff</td> <td></td> </tr> <tr> <td colspan="2" style="text-align: center;">Total</td> <td></td> </tr> </tbody> </table> | Category | | | 1 | Directorial/Administrative | | 2 | Academic/Market research | | 3 | Key managers personal | | 4 | Accounts and Finance | | 5 | Support staff | | Total | | |
| Category | | | | | | | | | | | | | | | | | | | | | | | |
| 1 | Directorial/Administrative | | | | | | | | | | | | | | | | | | | | | | |
| 2 | Academic/Market research | | | | | | | | | | | | | | | | | | | | | | |
| 3 | Key managers personal | | | | | | | | | | | | | | | | | | | | | | |
| 4 | Accounts and Finance | | | | | | | | | | | | | | | | | | | | | | |
| 5 | Support staff | | | | | | | | | | | | | | | | | | | | | | |
| Total | | | | | | | | | | | | | | | | | | | | | | | |
| 11 | Annual Budget/turnover of the organisation in last 3 years | <table border="1"> <thead> <tr> <th>2012-13</th> <th>2013-14</th> <th>2014-15</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> </tr> </tbody> </table> | 2012-13 | 2013-14 | 2014-15 | | | | | | | | | | | | | | | | | | |
| 2012-13 | 2013-14 | 2014-15 | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | |
| 12 | <p>Details of the projects undertaken in the past, broadly similar to the proposed Survey</p> <p>(i) Name & Nature of Project(s)</p> <p>(ii) Year of commencement</p> <p>(iii) Cost of project</p> <p>(iv) Fee earned by the organisation under the project</p> <p>(v) Nature of responsibility undertaken</p> <p>(vi) Organisation for which undertaken</p> <p>(vii) Year of completion.</p> <p>(viii) Performance highlights – accolades / outstanding achievements, if any.</p> | | | | | | | | | | | | | | | | | | | | | | |
| 13 | Whether the organisation has ever been in receipt of Grant-in-Aid from any Ministry/ Department of the Central/State Government ? If yes, details | | | | | | | | | | | | | | | | | | | | | | |

| | | |
|----|--|--|
| | (i) Year in which received (ii) Scheme for which received (iii) Name of Ministry/Deptt/ Central Govt./State Govt. (iv) Purpose (v) Amount | |
| 14 | Whether the organisation has ever been blacklisted by Central Ministry/Deptt. or State Govt.? If yes, details. | |
| 15 | Details, which the organisation may wish to submit in support of its claim of being a reputed organistaion in its field | |
| 16 | Any other related relevant information which the organization wishes to furnish. | |

Enclosures:

- i. Copy of registration of the organization/institution, under relevant Act,.
 - ii. Copy of its Articles of Association/Bye-laws/regulations,as applicable,
 - iii. Last 3 years' Annual Report of the organization/institution,
 - iv. Last 3 years' Audited Annual Accounts of the organization/institution.
- The above particulars are true to the best of my information.

Yours sincerely,

Place:

Date:

(Signature of authorized signatory on behalf of the Organisation with seal),
Name :
Address:

Form 2: Compliance Sheet for Pre-Qualification Criteria

| Sr.No. | Basic Requirement | Documents Required | Provided | Reference & Page No. |
|--------|---|---|--------------------------|----------------------|
| 1 | Category of the Agency: Academic Institutions/ Policy Research Institute/ Not for Profit Organizations/ Registered Societies | 1. Latest annual report indicating the category of the agency 2. Agency's profile | Yes / No Yes / No | |
| 2 | The institutions/ organizations should have been in existence for a period of at least 5 years on the date of the application | Copy of registration indicating date of registration | Yes / No | |
| 3 | Completed at least two projects in the last two years related to the assignment. | Published material and a copy of Work Order | Yes / No | |
| 4 | In-house capacity to deploy the resources who will administer the project: | CVs of Professionals | Yes / No | |
| 5 | A Project Lead/Manager with 10+ years of total work experience with minimum 5 years in managing assessment projects | CV of Professionals | Yes / No | |
| 6 | Statistician with at least 5 year of experience in statistical analysis and designing sampling of similar type of survey/Projects | CV of Professionals | Yes / No | |
| 7 | Professionals with at least 5 year of experience in conducting large field surveys | CV of Professionals | Yes / No | |
| 8 | Professionals with at least 5 year of experience in analysis, report and case study writing | CV of Professionals | Yes / No | |
| 9 | Idea about note on scope and methodology | Note on methodology | Yes/No | |
| 10 | Infra and tech competence | Note | Yes / No | |

Form 3: Format for CV of Professionals to be deployed in the Project

| Sr. No. | Details | | | |
|---------|--|---------------------|--------|--------------------|
| 1 | Name of the Professional: | | | |
| 2 | Qualifications (Graduation & above only) | | | |
| 3 | Total years of work experience: | | | |
| 4 | Total years of relevant experience: | | | |
| 5 | Key Expertise (e.g. Project Management, Surveys, Statistical Analysis and Sampling, etc.) | | | |
| 6 | Languages Known: | | | |
| 7 | Publications | | | |
| 8 | Work history (current to past) | | | |
| 8a | <u>Current</u> | | | |
| | Designation: | | | |
| | Organization: | | | |
| | Duration: From: DD/MM/YYYY To: DD/MM/YYYY | | | |
| | Key Job responsibilities: <i>Only relevant experience to be listed</i> | | | |
| | Projects handled | Role in the project | Client | Team Size (if any) |
| | | | | |
| | | | | |
| 8b | <u>Previous</u> | | | |
| | Designation: | | | |
| | Organization: | | | |
| | Duration: From: DD/MM/YYYY To: DD/MM/YYYY | | | |
| | Key Job responsibilities: <i>Only relevant experience to be listed</i> | | | |
| | Projects handled | Role in the project | Client | Team Size (if any) |
| | | | | |
| | | | | |
| 9 | Any Other (Clerifications, trainings received etc) | | | |

End of EOI Document
