



## **Request for Proposal (RFP)**

### **Hiring of an agency for managing a (Sports) Scholarship Program**

**Prepared by:**

**SBI Foundation**

**35, Arcade, World Trade Centre, Cuffe Parade, Mumbai – 400005**

[www.sbfoundation.in](http://www.sbfoundation.in)

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## Introduction

### SBI Foundation

SBI Foundation (SBIF) was incorporated to bring all the CSR activities of State Bank Group under one umbrella and contribute to the efforts made by the State Bank Group to support and uplift the underprivileged sections of society. The focus areas of SBIF are Livelihoods & Entrepreneurship, Education, Environment, Sports, Rural Development, Healthcare, Disability & Inclusion and Women Empowerment.

So far, SBIF has impacted the lives of more than 20 million beneficiaries through its various CSR initiatives and aims to continue improving the socio-economic well-being of society, particularly of the less fortunate and under-privileged members and enable them to live up to the potential that they all possess.

**SBIF ACE** is SBI Foundation's flagship program in the domain of sports. It comprises key interventions in building state-of-the-art sports infrastructure, creating and nurturing strategic partnerships for sports.

As a strategic initiative to support para-athletes, SBI Foundation has launched the **SBIF ACE - Para Athlete Sports Scholarship (PASS)** with the aim of empowering talented para-athletes across India. The SBIF ACE - PASS seeks to provide financial assistance to para-athletes, enabling them to focus on their training, competition, and overall athletic development. Through this program, 100 para-athletes will be identified and supported with the necessary resources to excel in their sporting careers.

### **About the Request for Proposal (RFP)**

SBIF intends to engage organisations registered in India with experience in managing scholarship projects. The purpose of this Request for Proposal (RFP) is to invite potential grantees with a proven track record to implement and manage large-scale scholarship programmes, as per the details outlined in the Scope of Work, during the current financial year, FY 2025-26. This document provides information to enable the agencies to understand the requirements of SBIF for submitting their "Proposals".

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## Invitation for Proposals

SBI Foundation hereby invites proposals for the Hiring of an agency to manage the SBIF ACE - PASS. The budget for a proposal should not be more than Rs. 15.00 Lakhs for a support period ranging 1 year. Multiple submissions will be disqualified.

The RFP document, proposal forms, document checklist, grant utilisation format, and quarterly reporting format are available on SBI Foundation's website: <https://www.sbifoundation.in/Request%20for%20Proposals>.

Agencies are requested to study this RFP document carefully and check their eligibility with the 'Document Checklist' and other criteria mentioned in the RFP before submitting their proposals in response to the call for RFPs. 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. Prospective agencies are requested to check the prequalification criteria before submission of the proposal (both Technical and Financial).

## Key Events and Dates

Sr. No.	Process step	Timeline/Details
1	Publication date of the RFP	29 <sup>th</sup> April 2025
2	Last Date for requesting clarifications through email	15 <sup>th</sup> May 2025
3	Last Date and Time for submission of proposals	22 <sup>nd</sup> May 2025
4	Communication to the shortlisted participants to make presentations	26 <sup>th</sup> May 2025
5	Tentative date for Presentations to be made by shortlisted candidates	27 <sup>th</sup> - 30 <sup>th</sup> May 2025
6	Final communication of selection	4 <sup>th</sup> June 2025
7	Place of Submission of Proposals (Online Submission only)	<p><a href="mailto:sbifacerfp@sbifoundation.co.in">sbifacerfp@sbifoundation.co.in</a></p> <p><b>Soft copies to be sent by 22<sup>nd</sup> May 2025 with the subject line “SBIF ACE - PASS RFP (ORGANISATION NAME)”</b></p> <p>Only Shortlisted organisations will be contacted, and they shall be required to submit hard copies at a later date.</p> <p><b>Address:</b> SBI Foundation, Shop no. 35, The Arcade, World Trade Centre, Cuffe Parade, Mumbai 400005.</p>

## Instructions to the Agencies

### 1. Submission of Proposal

- a. The agency can only submit one proposal at a time.
- b. The agency should submit the proposal only if it meets all the criteria mentioned in this RFP. No deviations are allowed. No reference is entertained; it might also lead to disqualification.

### 2. Completeness of Response:

- a. The agencies are requested to study all instructions, forms, terms, requirements and other information in the RFP document carefully (including proposal format, document checklist, reporting formats, etc.). Submission of the proposal shall be deemed to have been done after careful study and examination of the RFP document with a full understanding of its implications.
- b. The response to this RFP should be complete in all respects. Failure to furnish all information required by the RFP documents or submission of a proposal not substantially responsive to the RFP documents in every respect will be at the agency's risk and may result in the rejection of its proposal.
- c. The RFP and all the annexures should be **downloaded and filled** from the link furnished - <https://www.sbifoundation.in/Request%20for%20Proposals>. All completed formats should be sent to the email address [sbifacerfp@sbifoundation.co.in](mailto:sbifacerfp@sbifoundation.co.in) by 22<sup>nd</sup> May 2025. The shortlisted agency will be requested to submit hard copies at a later date.

### 3. Agency Inquiries/Clarifications:

- a. The agency shall send their queries to [sbifacerfp@sbifoundation.co.in](mailto:sbifacerfp@sbifoundation.co.in) with the subject line '**SBIF ACE - PASS RFP Queries**' before 15<sup>th</sup> May 2025 (Due date for submission of queries/clarifications as mentioned in the Key Events and Dates). Queries received after the aforesaid due date will not be responded to/acted upon.
- b. Queries on the telephone, social media or any other medium will **NOT** be entertained.

### 4. SBIF's right to terminate the process:

- a. SBIF may terminate the RFP process at any time without assigning any reason thereof.
- b. SBIF reserves the right to amend/edit/add/delete any clause. However, this will be informed to all and will become part of the RFP.

- c. During the RFP process, if any information is found false/ fraudulent/ mala fide, then SBIF shall reject the proposal and, if necessary, initiate appropriate action.

**5. Language of Proposal:**

- a. Proposals should be submitted in English language only.

**6. Documents (Scan) to be submitted and Pre-qualification criteria:**

- a. The Agency should be a non-profit organisation/trust/society registered in India.

Documents to be submitted: Certificate of Incorporation/ Registration, tax-exempt status under 12 AA, Section 80(G) and/or 35 A (C) and/or FCRA of the Indian Income Tax Act, 1965. Approval for registration of entities for undertaking CSR activities (CSR-I) from the Registrar of Companies, Ministry of Corporate Affairs, Government of India.

- b. **Performance Track Record:** The Agency will be expected to have its own scholarship management application/dashboard with expertise in end-to-end operation and management of scholarships.

The agency will be expected to have a **minimum experience of 3 years in executing scholarship management projects** with the following broad scope:

- Design a customised platform to manage the scholarship program.
  - Conduct outreach and mobilisation efforts to raise awareness about the scholarship.
  - Manage the entire application process, including designing online forms.
  - Provide applicant support through a helpline number and support email.
  - Handle athlete selection, shortlisting, and document verification.
  - Manage telephonic interactions through a dedicated system, with recordings accessible to SBI Foundation.
  - Onboard scholars and manage their information in the Scholar Tracking System (STS)
  - Submit project reports along with key statistics for the scholars.
- c. Any subletting, sub-contracting and/or outsourcing of the activities shall not be allowed.

Documents to be submitted: Copies of previous project completion and work experience details.

- d. A self-declaration (on the letterhead) that the Grantee does not discriminate based on race, colour, religion, sex, national origin, age, sexual orientation,

gender identity, disability, genetic information, citizenship, veteran or marital status, or any other basis prohibited by law.

- e. The Agency should not have been blacklisted by any Government Agency/PSU/Central/State agency or under a declaration of ineligibility for fraudulent or corrupt practices. Documents to be submitted: Declaration from the current authorised signatory of the company.

***The agency must also submit the following documents (Scan) with the proposal:***

- Copy of the RFP shall be submitted with an authorised signature and official seal on each and every page of the RFP by the agency.
- Audited Annual financials should be submitted as per the proposal format
- Self-attested copy of Registration Certificate, tax-exempt status under 12 A, Section 80(G), PAN Card, IT Returns for last 3 consecutive financial years, Audited Financial Statements for last 3 consecutive financial years, Annual reports of activities for last 3 consecutive financial years and Memorandum of Association/ Trust Deed/ Rules and Regulations/Bye-Laws.

***The agency must also submit the remaining documents and policies (Scan) as mentioned in the document checklist (Annexure II).***

## **7. Evaluation Process:**

- a. SBI Foundation will shortlist the proposals based on the shortlisting criteria as mentioned on Page No. 14 of the RFP titled 'Selection Criteria for RFP'.
- b. The Internal Committee of SBI Foundation shall evaluate the shortlisted proposals based on the parameters defined on Page No. 14 titled 'Selection Criteria for RFP' of the RFP and submit its recommendation to the competent authority, whose decision shall be final in all aspects.

## **8. Penalty**

SBIF shall be at liberty to impose penalties, including cancellation of the awarded grant, if the agency indulges in fraudulent activities, malpractices and mala-fides. In case of the said situation, SBIF shall blacklist the implementing agency in its books and shall share the information with the Ministry of Corporate Affairs for further course of action.

## **9. Non-Disclosure Agreement (NDA)**

Selected agencies will have to sign the Non-Disclosure Agreement (Annexure - I) with SBIF.

**10. Transfer of RFP**

The RFP document is not transferable.

**11. Proposal Preparation Costs**

The agency shall submit the proposal at its own cost, and SBIF shall not be held responsible for any costs incurred by the agency. Submission of a proposal does not entitle the agency to claim any cost and rights over SBIF, and SBIF shall be at liberty to cancel any or all proposals without giving any notice. All materials submitted by the agencies shall be the absolute property of SBIF, and no copyright/patent, etc. shall be entertained by SBIF.

**12. SBIF's right to terminate the process**

SBIF may terminate the RFP process at any time and without assigning any reason thereof. SBIF reserves the right to amend/edit/add/delete any clause of this Proposal Document. However, this will be informed to all and will become part of the RFP.

**13. Submission of Proposals**

The proposal submission shall comprise the duly filled-in proposal format uploaded on the website, along with all the annexures as mentioned in the document checklist uploaded on the website.

**14. Late Proposals**

Any proposals received by SBIF after the deadline for submission of the proposal shall be declared late and will be rejected and returned unopened to the agency at the discretion of SBIF.

**15. Disclaimer:**

- i. The information contained in this RFP document or information provided subsequently to implementing agencies, whether verbally or in documentary form/email by or on behalf of SBI Foundation, is subject to the terms and conditions set out in this RFP document.
- ii. This RFP is not an offer by SBI Foundation, but an invitation to receive responses from the eligible implementing agencies.
- iii. The purpose of this RFP is to provide the implementing agencies with information to assist preparation of their proposals. This RFP does not claim to contain all the information each implementing agency may require. Each implementing agency should conduct its investigations and analysis and should check the accuracy, reliability and completeness of the information contained in this RFP and, where necessary, obtain independent advice/clarifications. SBI Foundation may, in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this RFP.

- iv. The SBI Foundation, its employees and its advisors make no representation or warranty and shall have no liability to any person, including any applicant under any law, statute, rules, regulations or tort, principles of restitution or unjust enrichment or otherwise for any loss, damages, cost or expense which may arise from or be incurred or suffered on account of anything contained in this RFP or otherwise, including the accuracy, adequacy, correctness, completeness or reliability of the RFP and any assessment, assumption, statement or information contained therein or deemed to form or arising in any way for participation in this process.
- v. The SBI Foundation also accepts no liability of any nature, whether resulting from negligence or otherwise, howsoever caused, arising from reliance of any implementing agency upon the statements contained in this RFP.
- vi. The issue of this RFP does not imply that SBI Foundation is bound to select an implementing agency or engage an agency, and SBI Foundation reserves the right to reject all or any of the implementing agencies or proposals without assigning any reason whatsoever.
- vii. The implementing agency is expected to examine all instructions, forms, terms and specifications in the RFP Document. Failure to furnish all information required by the RFP or to submit a proposal not substantially responsive to the RFP in all respects will be at the implementing agency's risk and may result in the rejection of the proposal.

#### **16. Modification and Withdrawal of Proposals:**

- i. The implementing agency may modify or withdraw its proposal after the proposal submission, provided that written notice of the modification, including substitution or withdrawal of the proposal, is received by SBI Foundation before the deadline prescribed for submission of proposals.
- ii. No modification in the proposal shall be allowed after the deadline for submission of the proposal.

**SBIF shall award the contract to the selected/identified agency at the Quality & Cost Based Selection (QCBS) method. Allocation of marks will be done by assigning weightage to the Technical Proposal (80%) and Financial Proposal (20%).**

## Scope of Work

The proposed projects under **SBIF ACE - PASS** must broadly follow the framework as mentioned below:

**Thematic area:** Sports

**Preferred project locations:** PAN India

### FRAMEWORK FOR SBIF ACE - PASS

The Agency must include the provision of the following services for the implementation of the **SBIF ACE - PASS**:

- Existing and operational in-house, end-to-end Scholarship Management System.
- Outreach and mobilisation to spread awareness about the Scholarship.
- Promotion of the SBIF ACE - PASS through print and digital media, including social media, print advertisements, emails, newsletters, articles, etc.
- Development of online application form and customisation of application management dashboard (live in real-time, with admin access to SBI Foundation).
- Application support and redressal of queries by applicants to facilitate application submission.
- Scrutiny of applications received, facilitating document submission and document verification.
- Conduction of recorded calls, shortlisting and selection as per the SBIF ACE - PASS model.
- Scholar onboarding, document and bank account verification.

The Agency must follow the below-mentioned criteria for scholar shortlisting.

### **Eligibility Criteria for the SBIF ACE - PASS:**

- The applicant must be an Indian citizen and have represented their state and/or India in national or international competitions.
- The applicant must be ranked within the top 20 in international rankings or within the top 10 in national rankings published by their respective National Sports Federations (NSFs). Top-ranked among the applicants will receive preference. A declaration with the relevant supporting documents for the same would be signed by the athlete.
- Only rankings in the senior category will be considered.
- 12 sports will be selected from among the events competed at the Paralympic Games.

- For doubles or team events, the athlete must be an active team member. Joint ranking/ Team ranking will be considered.
- The upper age limit at the time of application is 35 years.
- The applicant should not be employed or receiving a scholarship from any other organisation or institution as of the date of selection for the scholarship and will not avail of another scholarship during the duration of the scholarship. An undertaking to opt out of their current scholarship program, if selected, must be submitted.
- The scholarship shall be discontinued for any athlete who gets employment or a scholarship from any other organisation or institution during the tenure of this scheme.

#### Benefits for Selected Scholars:

- Each selected athlete will receive a stipend of ₹ 40,000 per month for a one-year duration.
- The performance of the athletes will be evaluated each year, and based on the current and revised criteria (from time to time), the selection of the athletes will be renewed or weeded out.
- The stipend amount will be inclusive of all the benefits such as training, equipment, mentorship or any other financial or non-financial support required for an athlete.

#### Number of beneficiaries

- 100 para-athletes across 12 sports disciplines as below:

Sr. No.	Para Sports	Number of Athletes to be Supported	
		Male	Female
1.	Archery	6	6
2.	Athletics	12	12
3.	Badminton	7	7
4.	Cycling	2	2
5.	Canoeing	2	2
6.	Judo	2	2
7.	Powerlifting	2	2
8.	Rowing	2	2
9.	Shooting	8	8
10.	Swimming	2	2
11.	Table Tennis	3	3
12.	Taekwondo	2	2
<b>Total athletes supported</b>		<b>50</b>	<b>50</b>

Agencies applying for a project must follow the broad framework for the SBIF ACE - PASS as outlined above.

## Selection Criteria for Agencies

The evaluation of the agencies shall be done by the competent authority on the following parameters:

### A. Project Proposal

1. Alignment with the 'SBIF ACE - PASS' framework.
2. Clear and concise detailing of the proposed solution, implementation plan and outcomes.
3. Innovation in the project.
4. Risk-mitigation measures.
5. Comprehensiveness of the Log frame & Project timelines.
6. Project Monitoring & Evaluation Process.

### B. Experience

1. The agency should have a minimum of 3 years of existence on the date of publication of this RFP.
2. The agency should have a minimum of 3 years of overall work experience in managing large-scale scholarships.
3. The agency that has demonstrated the capability to improve measurable outcomes to ensure the effectiveness and efficiency of the intervention will be preferred.
4. The agency must have an understanding and knowledge of the Indian sporting landscape and a general understanding of the various event categories and rankings of athletes across national sports federations in India.
5. The agency must have managed a scholarship corpus of at least INR 5.00 crores so far.
6. The agency must have an in-house team for project implementation, with more than 5 permanent employees.
7. The agency must have an existing dashboard/scholarship management portal.
8. The agency must have existing and comprehensive SOPs in place for scholarship application management.
9. The NGO must have completed at least 3 assignments/projects of a similar nature funded by the public sector/ Government Organisations/Central/State government authority/ Foundations.

### C. The Agency shall be rejected if:

1. The cumulative annual revenue of the organisation for the last 3 financial years is less than Rs. 2.00 Crores.
2. It has political or religious associations.
3. It fails to furnish the due diligence documents mentioned in Annexure II.
4. The number of board members is less than 3.
5. The number of permanent employees is less than 5.
6. The individual donors are among the top 3 donors.

## Guidelines for Proposal

### The Proposal should comprise the following:

1. The proposals must be direct, concise, and complete. All information not directly relevant to this RFP should be omitted. The implementation plan should be mentioned in a step-by-step approach, Log frame with means of verification and Work plan with clear timelines should be part of the proposal. SBIF will evaluate the agency's proposal based upon its clarity and the directness of its response to the requirements of the project as outlined in this RFP.
2. Prices shall be quoted entirely in Indian Rupees. The price quoted would be inclusive of all taxes, duties, charges, and levies as applicable. The detailed financials have to be submitted, including cost breakups.
3. The proposed interventions should be sustainable and scalable and can be replicated across geographies and demographics.
4. The NGOs having demonstrated the capability to improve measurable outcomes to ensure the effectiveness and efficiency of the intervention will be preferred.
5. Projects should be inclusive in nature, targeting beneficiaries from all strata and groups of society.

# Annexure I

## Non-Disclosure Agreement

This Non-Disclosure Agreement ("Non-Disc") is made and entered into ..... day of ..... month ..... year (effective date) by and between SBI Foundation (SBIF) and ..... (Organisation's name) and whereas, SBIF and ..... (Hereinafter referred to as the service provider) have entered into a Non-Disclosure Agreement effective from DD/MM/YYYY.

And,

Whereas, each party desires to disclose to the other party certain information in oral or written form, which is proprietary and confidential to the disclosing party ("CONFIDENTIAL INFORMATION").

NOW, THEREFORE, in consideration of the foregoing and the covenants and agreements contained herein, the parties agree as follows:

### 1. Definitions (As used herein):

(a) The term "Confidential Information" shall include, without limitation, all information and materials, furnished by either Party to the other in connection with - citizen/users/persons/customers data, products and/or services, including information transmitted in writing, orally, visually, (e.g. video terminal display etc.) or on magnetic or optical media, and including all proprietary information, customer & prospect lists, trade secrets, trade names or proposed trade names, methods and procedures of operation, commercial or marketing plans, licensed document know-how, ideas, concepts, designs, drawings, flow charts, diagrams, quality manuals, checklists, guidelines, processes, formulae, source code materials, specifications, programs, software packages, codes and other intellectual property relating to the disclosing party's data, computer database, products and/or services. Results of any tests, sample surveys, analytics, data mining exercises or usages etc. carried out by the receiving party in connection with the SBIF's Information including citizen/users/persons/customers' personal or sensitive personal information as defined under any law for the time being in force shall also be considered Confidential Information.

(b) The term "SBI Foundation (SBIF)" shall include the officers, employees, agents, consultants, contractors and representatives of SBIF.

(c) The term "Service Provider" shall include the directors, officers, employees, agents, consultants, contractors and representatives of \_\_\_\_\_ (Company Name), including its applicable affiliates and subsidiary companies.

### 2. Protection of Confidential Information:

With respect to any Confidential Information disclosed to it or to which it has access, the Service Provider affirms that it shall:

(a) Use the Confidential Information as necessary only in connection with the Project and in accordance with the terms and conditions contained herein;

(b) Maintain the Confidential Information in strict confidence and take all reasonable steps to enforce the confidentiality obligations imposed hereunder, but in no event take less care with the Confidential Information than the parties take to protect the confidentiality of their own proprietary and confidential information and that of their clients;

(c) Not to make or retain copies of any commercial or marketing plans, citizen/users/persons/customers database, proposals developed by or originating from SBIF or any of the stakeholders of SBIF except as necessary, under prior written intimation from SBIF, in connection with the project, and ensure that any such copy is immediately returned to SBIF even without express demand from SBIF to do so;

(d) Not disclose or in any way assist or permit the disclosure of any Confidential Information to any other person or entity without the express written consent of the other party; and

(e) Return to the other party, or destroy, at SBIF's discretion, any and all Confidential Information disclosed in a printed form or other permanent record, or in any other tangible form (including without limitation, all copies, notes, extracts, analyses, studies, summaries, records and reproductions thereof) immediately upon the earlier to occur of (i) expiration or termination of either party's engagement in the Project, or (ii) the request of the other party therefore.

(f) Not to discuss with any member of the public, media, press, or any other person about the nature of the arrangement entered into between SBIF and the Service Provider or the nature of services to be provided by the Service Provider to the SBIF.

3. Onus: The Service Provider shall have the onus of proving that any disclosure or use inconsistent with the terms and conditions hereof falls within any of the foregoing exceptions.

4. Exceptions: These restrictions, as enumerated in section 1 of this Agreement, shall not apply to any Confidential Information:

(a) Which is independently developed by the Service Provider or lawfully received from another source free of restriction and without breach of this Agreement; or

(b) After it has become generally available to the public without breach of this Agreement by the Service Provider; or

(c) Which at the time of disclosure to the Service Provider was known to such party to be free of restriction and evidenced by documentation in such party's possession; or

(d) Which SBIF agrees in writing is free of such restrictions.

(e) Which is received from a third party not subject to the obligation of confidentiality with respect to such Information;

5. Remedies: Service Provider acknowledges that:

- (a) any actual or threatened disclosure or use of the Confidential Information by the Service Provider would be a breach of this agreement and may cause immediate and irreparable harm to SBIF;
- (b) Service Provider affirms that damages from such disclosure or use by it may be impossible to measure accurately; and
- (c) injury sustained by SBIF may be impossible to calculate and remedy fully.

Therefore, the Service Provider acknowledges that in the event of such a breach, SBIF shall be entitled to specific performance of the Service Provider's obligations contained in this Agreement. In addition, the Service Provider shall indemnify SBIF of the actual and liquidated damages which may be demanded by SBIF. Moreover, SBIF shall be entitled to recover all costs (including reasonable attorneys' fees) that it or they may incur in connection with defending its interests and enforcement of legal rights arising due to a breach of this agreement by the Service Provider.

6. Need to Know: Service Provider shall restrict disclosure of such Confidential Information to its employees and/or consultants with a need to know (and advise such employees of the obligations assumed herein), shall use the Confidential Information only for the purposes set forth in the Agreement, and shall not disclose such Confidential Information to any affiliates, subsidiaries, associates and/or third party without prior written approval of the disclosing party.

7. Intellectual Property Rights Protection: No license to a party, under any trademark, patent, copyright, design right, mask work protection right, or any other intellectual property right is either granted or implied by the conveying of Confidential Information to such party.

8. No Conflict: The parties represent and warrant that the performance of its obligations hereunder does not and shall not conflict with any other agreement or obligation of the respective parties to which they are a party or by which the respective parties are bound.

9. Authority: The parties represent and warrant that they have all necessary authority and power to enter into this Agreement and perform their obligations hereunder.

10. Dispute Resolution: If any difference or dispute arises between the SBIF and the Service Provider in connection with the validity, interpretation, implementation or alleged breach of any provision of this Agreement, any such dispute shall be referred to the Managing Director, SBIF.

11. Entire Agreement: This Agreement constitutes the entire understanding and agreement of the parties, and supersedes all previous or contemporaneous agreement or communications, both oral and written, representations and understandings among the parties with respect to the subject matter hereof.

12. Amendments: No amendment, modification and/or discharge of this Agreement shall be valid or binding on the parties unless made in writing and signed on behalf of each of the parties by their respective duly authorized officers or representatives.

13. Binding Agreement: This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and permitted assigns.

14. Severability: It is the intent of the parties that in case any one or more of the provisions contained in this Agreement shall be held to be invalid or unenforceable in any respect, such provision shall be modified to the extent necessary to render it, as modified, valid and enforceable under applicable laws, and such invalidity or unenforceability shall not affect the other provisions of this Agreement.

15. Survival: Both parties agree that all of their obligations undertaken herein with respect to Confidential Information received pursuant to this Agreement shall survive till perpetuity even after any expiration or termination of this Agreement.

16. Term: This Agreement shall remain valid up to 1 year from the "effective date".

IN WITNESS HEREOF, and intending to be legally bound, the parties have executed this

Agreement to make it effective from the date and year first written above.

For SBIF India,

For the Service Provider

\_\_\_\_\_

\_\_\_\_\_

Name of the authorised signatory

Name of the authorised signatory

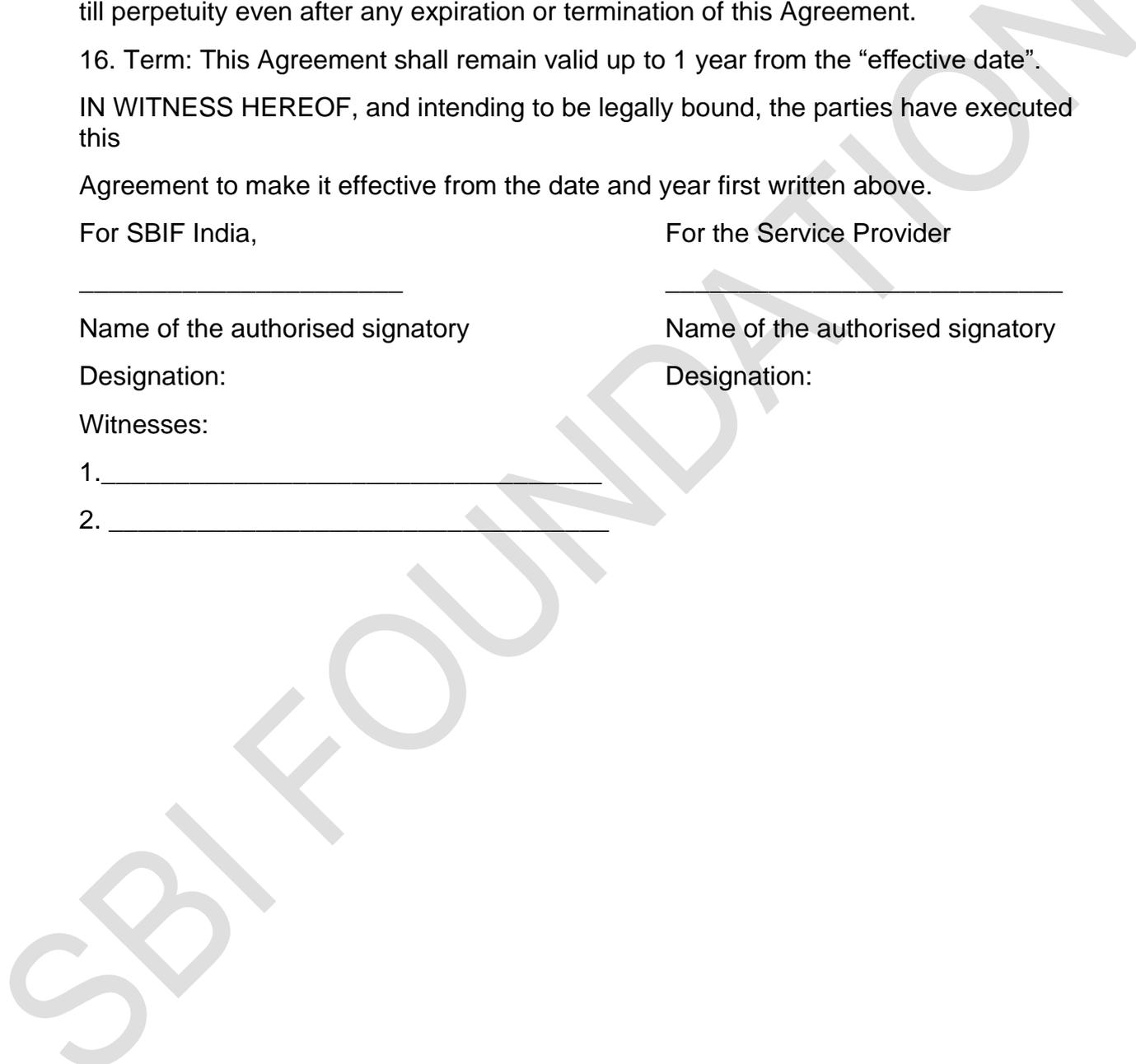
Designation:

Designation:

Witnesses:

1. \_\_\_\_\_

2. \_\_\_\_\_



## Annexure II

### Due Diligence Document Checklist

Sr. no	Documents
1	Proposal form
2	Two Donor Feedbacks
3	Trust Deed/ Rules and Regulations/ Memorandum of Association
4	Registration Certificate
5	12A Registration
6	80G Registration
7	FCRA Certificate
8	PAN
9	Address Proof
10	IT – Returns (Last 3 Financial Years)
11	Audited Reports (Last 3 Financial Years)
12	Self-Declaration
13	Annual Reports (Last 3 Financial Years)
14	Organisation Profile
15	Brief Bio Data (incl. Education and Work ex) of Board Members
16	Brief Bio Data (incl. Education and Work ex) of Top Management
17	Minutes of Board Meeting (last two)
18	<b>Personal/HR Policy:</b> Including Remuneration policy for Directors/Trustees; Remuneration policy for CEO, COO, Secretary, etc.; Promotion, Increment, Role assignment policy.
19	<b>Finance Policy:</b> Including procurement policy, Purchase/ Sale of Assets/ Investments.
20	Organogram of Organisation
21	Detailed Budget sheet in Excel
22	Third-party evaluation/Audit reports/Impact Assessment
23	MIS for planning, tracking & reviewing
24	Profile of Key Leaders and Founders
25	Press reports
26	Awards and Recognitions Pics/link
27	Feedback mechanism
28	Monitoring Mechanism/Software in place
29	GST certificate
30	Form CSR 1

## Annexure III

### Technical Proposal (Evaluation Form) –

Section 1: Organisation Details and Section 2: Project Proposal  
The proposal shall be evaluated out of 100.

Link: [Annexure III Technical Proposal \(Evaluation Form\).docx](#)

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## Annexure IV

### Financial Format

Link: [Annexure IV Financial Proposal.xlsx](#)

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## Annexure V

Format of Agreement/MoU

MoU & Grant Letter Format Link: [Annexure V Terms & Conditions.docx](#)

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