

Annex II Technical Proposal

Company name: _____

SECTION 1: SPECIFIC EXPERIENCE FOR THE ASSIGNMENT.

1.1 Please illustrate your organization and the one of the relevant partners for similar projects on measuring financial health/wellbeing or other latent multi-dimensional concepts such as financial behavior, poverty, happiness. Max 5 projects in past 5 years. (Each credential to not be more than half a page).

Use the below template until section 1.5.

Name of the project			
Grant/contract value (USD)		Website if applicable	
Target Country(ies)		Project Period	
Name of the Client/funder			
References contact details	Name	Position	Phone number email
Description of the approach/methodology			
Key outputs/deliverables produced			
Names of the staff that participated in the assignment			
Knowledge product production and dissemination strategy of the assignment			

(copy/paste table above if you wish to add other relevant projects)

<p>1.2 Please illustrate your organization and the one of the relevant partners for similar projects on measuring financial health/wellbeing or other latent multi-dimensional concepts such as financial behaviour, poverty, happiness.</p>
<p>1.3 Please illustrate your organization and the one of the relevant partners for similar projects on measuring financial health/wellbeing or other latent multi-dimensional concepts such as financial behavior, poverty, happiness.</p>
<p>1.4 Please illustrate your organization and the one of the relevant partners for similar projects on measuring financial health/wellbeing or other latent multi-dimensional concepts such as financial behavior, poverty, happiness.</p>
<p>1.5 Please illustrate your organization and the one of the relevant partners for similar projects on measuring financial health/wellbeing or other latent multi-dimensional concepts such as financial behavior, poverty, happiness.</p>
<p>SECTION 2: APPROACH AND METHODOLOGY (Max 12 pages)</p>
<p>2.1. Please provide a detailed approach and methodology for RFA. Please provide an overall project plan as well as a detailed activity wise plan for measuring financial health in Malaysia.</p>
<p>2.2 Technical Quality Assurance Review Mechanisms: The methodology shall also include details of the applicant's internal technical and quality assurance review mechanisms (Max 1 page)</p>
<p>Specify challenges and dependencies you foresee. What can be done to mitigate these? (Max 1 page)</p>
<p>Section 3: Project Management</p>
<p>2.3 Project Timelines: Submit a Gantt Chart or Project Schedule indicating the detailed sequence of activities that will be undertaken and their corresponding timing, specifying timelines, person responsible, and time devoted to each activity.</p>
<p>2.4. Sub-Grantees: Explain if any work would be delegated, to whom, how much percentage of the work, the rationale for such, and the roles of the proposed sub-grantees. Especially in the case of consortiums, give special attention should be given to providing a clear picture of the role of each entity and how everyone will function as a team. (max 1 page)</p>
<p>2.5. Reporting and Monitoring: Please provide a brief description of the mechanisms proposed for this project for reporting to (and ongoing communication with) UNCDF and partners, including a reporting schedule (also reflected in Gantt chart) and indicators list. (max 1 page)</p>
<p>2.6 Other: Any other comments or information regarding the project (max 1 page)</p>

SECTION 3: Team

3.1 Management Structure: Describe the overall management approach toward planning and executing this engagement. Include an organization chart for the management of the project describing the relationship of key positions and designations along with information on the roles and structure of any sub-grantees, contractors, or other critical relationships.