



Unlocking Public and Private
Finance for the Poor

ANNEX 1: SUBMISSION FORMAT

[insert: Location]

[insert: Date]

To: Ruth Goodwin-Groen, Managing Director, Better Than Cash Alliance

Dear Madam,

We, the undersigned, hereby apply for **Mexico Action Research on Private Sector Scaling Digitization Initiative**, in accordance with your Request for Application dated [insert: Date] and our Application. We are hereby submitting our Application, which includes the Technical Proposal including proposed budget allocation. We hereby declare that:

- a) All the information and statements made in this Application are true, and we accept that any misrepresentation contained in it may lead to our disqualification; and
- b) We have no outstanding bankruptcy or pending litigation or any legal action that could impair our operation as a going concern.

We confirm that we have read, understood, and hereby accept the duties and responsibilities required of us in this RFA, and the standard language of UNCDF's Performance-Based Agreements, including the requirements regarding the public good nature of the outputs to be produced (see Annex 2 for a sample of our legal language in this regard). Therefore, if our application is accepted, we will be ready to sign and accept the legal language, without modification, of the UNCDF grant agreement (performance-based) by **Oct, 2021**.

We fully understand and recognize that UNCDF is not bound to accept this application, that we shall bear all costs associated with its preparation and submission, and that UNCDF will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the evaluation.

We remain,

Yours sincerely,

Authorized Signature [In full and initials]:

Name and Title of Signatory:

Name of Firm:

Contact Details:

[Please mark this letter with your corporate seal, if available]

30 pages maximum of Application



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COMPANY NAME:

SPECIFIC EXPERIENCE FOR THE ASSIGNMENT

1. Please describe your organization's experience in producing similar projects/studies, especially for private sector companies (business analysis, cost benefit, etc.). For each one, make sure you describe the following (maximum half a page per project):
 - Name of the project:
 - Client/Funder and contact details (if applicable):
 - Grant/Contract value:
 - Description of the **approach/methodology**:
 - Types of **outputs/deliverables** produced/activities undertaken:
 - Tools you used to conduct the project (e.g., stakeholder analysis, cost-benefit analysis, roadmap to implement proposed recommendations, metrics/indicators, etc.):
 - Time it took you to complete the assignment
 - Number of people and names of the staff who participated in the assignment:
 - Knowledge product production and dissemination strategy of the assignment:
2. Please describe your organization's experience in analyzing the unbanked population's financial services needs and digital financial services product design to identify suitable solutions and develop practical recommendations to be implemented for the adoption of digital financial services (maximum 1 page). Please include examples from the agriculture sector where appropriate.
3. Please describe your organization's experience in designing, managing, and delivering multi-stakeholder programs, including business analysis for private sector companies and/or recommendations for public and private partnerships (maximum 1 page).



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Finance for the Poor

4. Please describe your organization's experience in access to financial services in Rwanda, including previous projects and contacts on digital financial solutions, and your strategy to ensure the presence of one team member in Rwanda throughout the project (maximum 1 page).

5. Please describe your organization's experience of knowledge product production, packaging, and dissemination (maximum 1 page).

SPECIFIC EXPERIENCE FOR THE ASSIGNMENT

6. Please describe your organization's experience in producing similar projects/studies, especially for private sector companies (business analysis, cost benefit, etc.). For each one, make sure you describe the following (maximum half a page per project):

- Name of the project:
- Client/Funder and contact details (if applicable):
- Grant/Contract value:
- Description of the approach/methodology:
- Types of outputs/deliverables produced/activities undertaken:
- Tools you used to conduct the project (e.g., stakeholder analysis, cost-benefit analysis, roadmap to implement proposed recommendations, metrics/indicators, etc.):
- Time it took you to complete the assignment:
- Number of people and names of the staff who participated in the assignment:
- Knowledge product production and dissemination strategy of the assignment:

7. Please describe your organization's experience in analyzing digital payment ecosystems' pain points, dos, and don'ts, as well as digital financial services product demand and design to identify suitable solutions and develop practical recommendations to be implemented for the adoption of digital financial services platform (maximum 2 pages).

8. Please describe your organization's experience in designing, managing, and delivering multichannel or omnichannel digital payment platforms, including scalability challenges in adoption and usage by fast moving consumer good companies and small merchants (maximum 2 pages).



Unlocking Public and Private
Finance for the Poor

9. Please describe your organization’s experience in working on digital payments in Mexico or other countries, including previous projects and contacts on digital financial solutions, and your strategy to ensure proposals comply with a country’s regulation, behavioral characteristics of its population, and maturity of its digital payment ecosystem (maximum 1 page).
10. Please describe your organization’s knowledge (front and back-office) on fast moving consumer good companies’ needs and challenges regarding payment collection during product distribution (maximum 1 page).
11. Please describe your organization experience in implementing gender sensitive analysis, collecting sex-disaggregated data or designing digital financial products or services with a focus on women.

APPROACH AND IMPLEMENTATION PLAN (10 pages maximum)

12. Approach to the Results Required

Please provide a **detailed** description of the **approach/methodology including sample size** for how the organization/firm **will achieve project outputs and deliverables**, keeping in mind the appropriateness to local conditions and project environment. Please include any proposed changes to the RFA.

13. Technical Quality Assurance Review Mechanisms

The methodology shall also include details of the applicant’s internal technical and quality assurance review mechanisms.

14. Implementation Timelines

The Applicant shall submit a Gantt Chart or Project Schedule indicating the detailed sequence of activities that will be undertaken and their corresponding timing, specifying timelines and time devoted to each result.



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Finance for the Poor

15. Sub-grantees

Explain whether any work would be delegated, to whom, what percentage of the work, the rationale for such, and the roles of the proposed sub-grantees. Special attention should be given to providing a clear picture of the role of each entity and how everyone will function as a team.

16. Risks/Mitigation Measures

Please describe the potential risks for the implementation of this project that may impact the achievement, timely completion, or quality of expected results. Describe measures that will be put in place to mitigate these risks.

17. Reporting and Monitoring

Please provide a brief description of the reporting mechanisms proposed for this project to UNCDF and its partners, including a reporting schedule (also reflected in Gantt chart).

18. Other

Any other comments or information regarding the project approach and methodology that will be adopted.

SECTION 4: PERSONNEL

19. Management Structure

Describe the overall management approach towards planning and implementing this result. Include an organization chart for the management of the project, describing the relationship of key positions and designations.



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20. Staff Time Allocation

Provide a spreadsheet to show the activities of each staff member and the time allocated for their involvement. (Note: *This spreadsheet is crucial, and no substitution of personnel will be tolerated once the grant has been awarded except in extreme circumstances and with the written approval of UNCDF. If substitution is unavoidable, it will be with a person who, in the opinion of the UNCDF's Digital Finance Specialist, is at least as experienced as the person being replaced, and subject to the approval of UNCDF. No increase in the grant will be considered as a result of any substitution.*)