**Annex II Technical Proposal**

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| **SECTION 1: GENERAL APPLICANT’S INFORMATION** | | | |
| 1. Applicant’s Legal Name (In case of consortium, Lead Applicant): | | | |
| 2. Type of Organization (e.g. commercial for-profit firm, educational, non-profit etc): | | | |
| 3. In case of Joint Venture (JV), legal name of each party: | | | |
| 4. Actual or intended Country/ies of Registration/Operation: | | | |
| 5. Year of Registration: | | | |
| 6. Countries of Operation | 7. No. of staff in each Country | | 8.Years of Operation in each Country |
| 9. Legal Address/es in Country/ies of Registration/Operation: | | | |
| Website URL | |  | |
| Social Media URL (Facebook) | |  | |
| LinkedIn | |  | |
| YouTube | |  | |
| Instagram | |  | |
| Other | |  | |
| 13. Applicant’s Authorized Representative Information  Name:  Address:  Telephone/Fax numbers:  Email Address: | | | |
| 15. Attached are copies of original documents of:  ☐ Audited financial statement for the past year duly certified by a public accountant  ☐Letter from the applicant organization’s executive director, CEO, or board, expressing its commitment to the execution and participation in this process.  ☐Complete CVs of all the team members involved in the assignment  ☐ Staff time allocation spreadsheet per activity | | | |
| **SECTION 2: SPECIFIC EXPERIENCE FOR THE ASSIGNMENT. In the case of consortia, please refer to the relevant partner’s experience for similar projects. You can include up to 5 most relevant projects in the past 3 years, (max. 1 page per project).**   |  |  |  |  | | --- | --- | --- | --- | | Name of the project |  | | | | Grant/contract value (USD) |  | Website if applicable | | | Target Country(ies) |  | Implementation Period |  | |  | | | | | Name of the Client/funder |  | | | | References contact details | name, | position | phone number email | |  |  |  | |  | | | | | Description of the approach/methodology |  | | | | Key outputs/deliverables produced |  | | | | Key Performance Indicators/ Targets |  | | | |  | | | | | Names of the staff that participated in the assignment |  |  |  | | Knowledge product production and dissemination strategy of the assignment |  | | | | | | |
| 2.2. Describe your experience in delivering key impact evaluations and related assessments on (digital) payments, remittances and financial services, financial inclusion, gender, migration, behavioural finance/science. Outline your experience in conducting research related to remittances, and financial sector with remittance services.  Demonstrated experience in using client impact evaluation for product and policy change and improvements. examples of how impact and research conducted has informed or shaped policy and product innovation.  Please provide a list of key relevant publications.  (max 5 pages) | | | |
| 2.3. Demonstrated capacity in conducting innovative and private sector-sensitive impact evaluation and assessments in developing countries and economies including, for example, big data and transaction-related impact evaluations, difference-in-difference, test and learn design, and rapid RCTs and quasi-experimental methods that are appropriate and suitable for measuring impacts of digital finance and remittance innovations. (max 3 pages) | | | |
| 2.4. Experience in Mix Method studies including mix of quantitative and qualitative components, data collection, innovative techniques proposed for impact evaluation proposed (e.g. test and learn, matching sampling, cohort analysis etc.), ability to measure various treatments, interest in combining measurement approaches to measure business case and social impact case for innovative financial and related services.  (max 3 pages) | | | |
| **SECTION 3: APPROACH AND IMPLEMENTATION PLAN (maximum 10 pages)** | | | |
| 3.1. Approach to the Results Required: Please provide a detailed description of the methodology for how the organisation(s)/firm(s) will achieve project outputs proposed in section 2.2 (see below) keeping in mind the appropriateness to local conditions and project environment.    3.2. Approach to Partnership with UNCDF and field-based Partners:The applicant must provide a detailed description of how to plan, implement and deliver the overall project in partnership with UNCDF and field-based partners. The applicant should describe how they will take the lead role in ensuring that there is sufficient and ongoing communication, both virtually and in person. This section should highlight the support necessary from UNCDF and local partners.  3.3. Technical Quality Assurance Review Mechanisms: The methodology shall also include details of the applicant’s internal technical and quality assurance review mechanisms.  3.4 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, person responsible, and time devoted to each activity.  3.5. Sub-Grantees: Explain whether 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, special attention should be given to providing a clear picture of the role of each entity and how everyone will function as a team.  3.6. 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 Grant chart) and indicators list in line with section 2.4 of the RFA.  3.7 Other: Any other comments or information regarding the project approach and methodology that will be adopted. | | | |
| **SECTION 4: PERSONNEL** | | | |
| 4.1 Management Structure: Describe the overall management approach toward planning and implementing this activity. 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.  4.2 Qualifications of Key Personnel.  Provide an overview of the qualifications and experience of the proposed team/faculty that will remain committed to delivering on this impact evaluation and that incorporates a good mix of profile from different backgrounds: remittance and migration; development economics; behavioural sciences; international finance. Ensuring sufficient staffing and human resources budgeted in the workplan. Provide the CVs for key personnel that will be provided to support the implementation of this project. CVs should demonstrate qualifications in areas relevant to the results to be produced. In **addition to the CVs**, please submit a summary for each person in the following format.   |  |  |  |  | | --- | --- | --- | --- | | **Name:** | |  | | | **Position for this Grant:** | |  | | | **Nationality:** | |  | | | **Contact information:** | |  | | | **Countries of Work Experience:** | |  | | | **Language Skills:** | |  | | | **Educational and other Qualifications:** | |  | | | **Summary of Experience:** *Highlight experience in the region and on similar projects.* | | | | | **Relevant Experience (From most recent):** | | | | | **Period: From – To** | **Name of activity/ Project/ funding organisation, if applicable:** | | **Job Title and Activities undertaken/Description of actual role performed:** | | *e.g. June 2004-January 2005* |  | |  | | *Etc.* |  | |  | | *Etc.* |  | |  | | **Reference no.1 (minimum of 3):** | *Name*  *Designation*  *Organization*  *Contact Information – Address; Phone; Email; etc.* | | | | **Reference no.2** | *Name*  *Designation*  *Organization*  *Contact Information – Address; Phone; Email; etc.* | | | | **Reference no.3** | *Name*  *Designation*  *Organization*  *Contact Information – Address; Phone; Email; etc.* | | | | **Declaration:**  I confirm my intention to serve in the stated position and present availability to serve for the term of the proposed grant agreement. I also understand that any wilful misstatement described above may lead to my disqualification, before or during my engagement.  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature of the Nominated Team Leader/Member Date Signed | | | | |  | | | | | | | |
| **SECTION 5: BUDGET PROPOSAL**  **Budget proposals should not exceed US$ 300,000 that UNCDF has available to fund the achievement of these results.**  **In the case of proposals by a consortium, please clearly indicate amounts for each partner. Applicants can use as a format the template provided in Annex 3 enclosed to this RFA.** | | | |
| Please provide budget allocation as outlined in Annex 3.  **Please provide budget allocation per result/milestone to be achieved in the following format (please refer to sections 2.1 and 2.3 of the RFA):**   1. Milestones  |  |  |  | | --- | --- | --- | | Indicative Payment date | Amount to be paid | Results/Milestone to be achieved as disbursement condition | |  |  |  | |  |  |  | | Total | USD… |  | | | | |