**Annex II Technical Proposal**

**Company name: \_\_\_\_\_\_\_**

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| **SECTION 1: SPECIFIC EXPERIENCE FOR THE ASSIGNMENT**   * 1. Illustrate your organization and the one of the relevant partners for similar projects on gender-centric consumer finance research. Max 5 projects in past 10 years[[1]](#footnote-1). (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)** |
| * 1. Illustrate your organization and the one of the relevant partners for similar projects on women-centric financial product and/or policy development research. Max 5 projects in past 10 years. Each credential to not be more than half a page. |
| * 1. Illustrate your organization and the one of the relevant partners for similar projects on financial literacy, capability, health (wellbeing) or related research. Max 5 projects in past 10 years. Each credential to not be more than half a page. |
| * 1. Illustrate your organization and the one of the relevant partners for similar projects on qualitative social research, particularly related to social norms mapping, and data analytics – both survey and transactional data. Max 5 projects in past 10 years. Each credential to not be more than half a page. |
| * 1. Illustrate your organization and the one of the relevant partners for similar projects on impact evaluation. Max 5 projects in past 10 years. Each credential to not be more than half a page. |
| **SECTION 2: APPROACH AND METHODOLOGY** |
| * 1. Provide a detailed approach and methodology for each activity of the RFA. Please provide an overall project approach and methodology as well as activity wise details. Please include any suggestive innovations in this section. (Max 12 pages) |
| * 1. Provide details of the technical quality assurance review mechanisms. The methodology shall also include details of the internal technical and quality assurance review mechanisms. (Max 1 page) |
| * 1. Provide details of the tools and frameworks that will be used for impact evaluation. (Max 1 page) |
| * 1. Specify challenges and dependencies that you foresee while conducting this engagement. What will you do to mitigate these? (Max 2 page) |
| * 1. Other: Any other comments or information regarding the project approach and methodology that will be adopted. (max 1 page) |
| **Section 3: PROJECT MANAGEMENT** |
| * 1. 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. (please use the Budget and Workplan template) |
| * 1. 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) |
| * 1. 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) |
| **SECTION 4: TEAM** |
| * 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. Specifically mention the field staff deployment in Odisha over the time period on the engagement. (max 5 pages) |

1. 10 years means the project start date should be on or after April 2011. [↑](#footnote-ref-1)