

- b) In exceptional circumstances, at its discretion, PFRDA may solicit the applicant's consent for an extension of the validity period. The request and responses shall be made in writing.

#### 4.11 Proposal Opening

- a) Total transparency will be observed while opening of proposals. Sealed envelopes of the proposals will be opened at the date and time as prescribed in **clause 4.15** of this RFE in the presence of authorized representatives of the applicants' who wish to attend the event physically or online. The maximum number of authorized representatives for each applicant will not be more than two. The applicant's representative(s) shall sign a register evidencing their attendance. PFRDA reserves the right at all times to postpone or cancel a scheduled RFE opening. The venue for opening of proposals is as mentioned under **clause 4.3** of the RFE.

#### 4.12 Evaluation of Proposal

- a) Proposals will be examined by an Evaluation cum Selection Committee constituted by PFRDA or its designated representative(s). PFRDA, or such other authority designated by PFRDA, as the case may be, is also referred to herein as the 'Committee'. The evaluation of proposals will be undertaken in two stages.
- b) The first stage of evaluation would involve examination of the proposal of each applicant by the evaluation cum selection committee against the eligibility criteria set out under **clause 2** of this RFE.
- c) Applicants who fulfill the eligibility criteria and have submitted all the required documents may be invited to make presentations to the Committee on their proposal at a date/time to be specified and conveyed by PFRDA and scores will be assigned by the Committee for their proposal.
- d) In the process of examination, evaluation and comparison of proposal, PFRDA may, at its discretion, request applicant(s) for clarification on its proposal which the applicant will be obliged to furnish in writing failing which its proposal is not liable to be evaluated further. The applicant(s) are expected to respond/provide the information/clarifications within the stipulated time. Failure to provide the information may lead to disqualification of the applicant.
- e) The Proposal, which includes presentation, will be evaluated by the Committee on the basis of the following criteria.

SL	Criteria	Maximum Marks	Scoring Parameters	Score
1	Average Annual Turnover of the applicant from training activities in the last three financial	10	1 Cr to 3Cr - 5marks 3 Cr to 7 Cr – 7 marks	

SL	Criteria	Maximum Marks	Scoring Parameters	Score
	years.		Above 7 Cr – 10 marks	
2	Number of years of experience from the date of assignments from clients as Training Institutes/ Organization as on last date of submission of RFE.	10	5 to 7 years - 5 marks 7 to 9 years – 7 marks More than 9 years – 10 marks	
3	No. of training projects conducted during the last 5 years as on 31 <sup>st</sup> March 2020, (during 2015-16 to 2019-20) in the Government/PSU/Pvt sector in BFSI on financial products	15	3 to 5 projects: 5marks 6 to 10 projects: 10 marks More than 10 projects: 15 marks	
4	No of training sessions conducted in the Government/PSU/Pvt sector in BFSI on financial products in the last 3 years as on 31 <sup>st</sup> March2020 (FY 2017-18, 2018-19 & 2019-20	15	1000-2500 sessions: 5 marks 2501-5000 sessions: 10 marks More than 5000 sessions:15 marks	
5	No. of participants trained in the last 3 years as on 31 <sup>st</sup> March2020 (FY 2017-18, 2018-19 & 2019-20	15	50000 to 60000 : 5 marks 60001 to 80000 : 10 marks 80001 and above : 15 marks	
6	Number of Trainers with desired qualification and experience Minimum number required is 30. Desired Qualification: Graduate/post graduate Minimum Experience of 2 years of providing training on financial products	10	30 to 40 : 5 marks 40 to 50 : 7 marks 51 and more : 10 marks	
7	Number of own training centres in the zone	5	10 to 15 centres : 1 marks 16 to 20 centres : 3 marks 21 or more centres : 5 marks	
8	Number of training projects conducted with the minimum 25 participants in each session during the last 5 years (FY: 2015-16 to 2019-20)	10	3 to 4 projects : 5 marks 5 to 6 projects : 7 marks 7 and above : 10 marks	
9	Presentation of a roadmap on managing the training activities of PFRDA	10	Based on Presentation	
<b>TOTAL</b>		<b>100</b>		

- f) The Applicant(s) scoring 70 marks or more in the Proposal Evaluation (i.e. 70 out of 100), will only be ranked for final empanelment.

#### 4.13 Evaluation Criteria and Ranking of proposals for empanelment

The proposal of only those applicants who have scored a minimum of 70 marks on the Proposal would be ranked in descending order of the marks obtained by each applicant i.e. Proposal securing highest marks will be ranked 1<sup>st</sup> and proposal with the lowest mark (above 70) will be ranked last.