



Request for Proposal (RFP)

SBI Gram Seva
(Integrated Village Development Program)

Prepared by:

SBI Foundation

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www.sbifoundation.in

Index

i.	Introduction	3
ii.	Key Events and Dates.....	4
iii.	Instructions to the Agencies	5
iv.	Scope of Work.....	10
v.	Selection Criteria for Agencies	10
vi.	Guidelines for Proposal.....	11
vii.	Annexure I (Non-Disclosure Agreement).....	12
viii.	Annexure II (Due Diligence Document Checklist)	16
ix.	Annexure III (Evaluation Form)	17
x.	Annexure IV (Financial Format)	18
xi.	Annexure V (Format of Agreement/MoU).....	19
xii.	Annexure VI (Key Information Sheet).....	20
xiii.	Annexure VII (Guidelines on Program Activities)	21

Introduction

SBI Foundation

SBI Foundation (SBIF) was incorporated to bring all the CSR activities of State Bank Group under one umbrella and contribute to the efforts made by the State Bank Group to support and uplift the underprivileged sections of society. The focus areas of SBIF are Rural Development, Healthcare, Disability & Inclusion, Education, Livelihoods/Entrepreneurship and Environment.

So far, SBIF has impacted the lives of more than a million beneficiaries through all its programmes/initiatives and aims to continue improving the socio-economic well-being of the society, particularly of the less fortunate and under-privileged members and enable them to live up to the potential that they all possess.

State Bank of India has always strived to contribute towards building a strong and developed rural India. '**SBI Gram Seva**' is a flagship program of SBI Foundation for **integrated development of the villages** through strategic interventions in multiple thematic areas viz., Digitalisation, Education, Health, WaSH (Water, Sanitation & Hygiene), Livelihoods, Women Empowerment, Infrastructure, and Environment etc.

In a nutshell, through 'Gram Seva', SBI Foundation is working towards realizing Gandhi Ji's dream of 'Gram Swaraj' by partnering with grassroots organisations and bringing community participation into the fore.

About the Request for Proposal (RFP)

SBI Foundation intends to engage non-profit organisations registered in India for implementing 'Gram Seva' program during FY 2024-25. The purpose of this Request for Proposal (RFP) is to invite potential grantees with a proven track record to implement program in integrated rural development theme. This document provides information to enable the agencies to understand the requirements of SBI Foundation for submitting their "Proposals".

Invitation for Proposals

SBI Foundation hereby invites proposals from NGOs/NPOs for implementing 'Gram Seva' integrated rural development program in the village clusters from the Districts as listed in this RFP. The proposed budget for the proposal should be in the range of Rs. 3.00 Crore to Rs. 4.00 Crore for a period of 2 Years. Agencies to apply for only one District from the provided list. Multiple submissions will be disqualified.

The RFP document, proposal forms, document checklist, grant utilisation format, quarterly reporting formats, guidelines on program activities are available on SBI Foundation's website: <https://www.sbifoundation.in/request-for-proposal>.

Agencies are requested to study this RFP document carefully before submitting their proposals in response to the call for RFPs. Submission of a proposal in response to this notice shall be deemed to have been done after careful study and examination of this document with full understanding of its terms, conditions and implications. Prospective agencies are requested to check the prequalification criteria before submission of proposal (both Technical and Financial).

Key Events and Dates

Sl.	Process step	Timeline*/Details
1	Publication date of the RFP	21 st Nov' 2024
2	Last Date for requesting clarifications through email	28 th Nov' 2024
3	Last Date and Time for submission of proposals via email to gramsevarfp@sbifoundation.co.in	12 th Dec' 2024 (6:30PM)
4	Communication to shortlisted NGOs to make presentations	21 st Dec' 2024
5	Tentative date for Presentations to be made by shortlisted NGOs	26 th Dec 2024 – 31 st Dec' 2025
6	Final communication of selection	After 6 th Jan' 2025
7	Place of Submission of Proposals (Physical copies only for Shortlisted NGOs)	<p>gramsevarfp@sbifoundation.co.in</p> <p>Soft copies to be sent by 12th Dec' 2024 with the subject line "SBI GRAM SEVA RFP-NGO NAME"</p> <p>Only Shortlisted NGOs will be contacted and they shall be required to submit Hard copies at a later date.</p> <p>Address: SBI Foundation, Shop no. 35, The Arcade, World Trade Centre, Cuffe Parade, Mumbai 400005</p>

* Cut off time for online submission: 6:30 pm (18:30 hrs) of the respective date

Instructions to the Agencies

1. Submission of Proposal

- a. The agency can submit only 1 proposal during this RFP process. (Any 1 District from the List of Districts mentioned under 'Scope of Work')
- b. The agency should submit the proposal if it meets all the criteria mentioned in this RFP. No deviations are allowed. No reference is entertained, it might also lead to disqualification.

2. Completeness of Response:

- a. The agencies are requested to study all instructions, forms, terms, requirements and other information in the RFP document carefully (including proposal format, document checklist, reporting formats etc.). Submission of proposal shall be deemed to have been done after careful study and examination of the RFP document with full understanding of its implications.
- b. The RFP and all the annexures should be **downloaded and filled** from the link furnished- <https://www.sbifoundation.in/request-for-proposal>. All completed formats should be sent to the SBI Foundation office by the mode of email to gramsevarfp@sbifoundation.co.in by **12th Dec 2024**. The shortlisted NGOs will be requested to submit hard copies at a later date.
- c. The response to this RFP should be complete in all respect. Failure to furnish all information required by the RFP documents or submission of a proposal not substantially responsive to the RFP documents in every respect will be at the agency's risk and may result in rejection of its proposal.

3. Agency Inquiries/Clarifications:

- a. The agency shall send their queries at gramsevarfp@sbifoundation.co.in with a subject **SBI Gram Seva- RFP Queries**, before 28th Nov 2024. Queries received after the aforesaid due date will not be responded/acted upon
- b. Queries on telephone, social media or any other medium will **NOT** be entertained.

4. SBIF's right to terminate the process:

- a. SBIF may terminate the RFP process at any time and without assigning any reason thereof.
- b. SBIF reserves the right to amend/edit/add/delete any clause. However, this will be informed to all and will become part of the RFP.
- c. During the RFP process, if any information is found false/ fraudulent/ mala fide, then SBIF shall reject the proposal and if necessary, initiate appropriate action.

5. Language of Proposal:

- a. Proposals should be submitted in English language only.

6. Documents to be submitted and Pre-qualification criteria:

- a. The Agency should be a non-profit organization/trust/society registered in India.

Documents to be submitted: A checklist of the documents is attached as Annexure II.

b. Performance track-record:

The agencies applying in the RFP:

The agencies should have a minimum 10 years of existence on the date of publication of this RFP. Agencies with higher experience will be given preference.

Agencies must have worked on at least 5 of the following themes of rural development viz,

- Promotion of Quality Education
- Improving Primary Health Services
- Providing Safe Drinking Water & Sanitation
- Agriculture & Allied Activities
- Skill Development & other Rural Livelihoods
- Digitalisation of Villages
- Empowerment of Rural Women
- Youth Development
- Improvement of Rural Infrastructure
- Natural Resource Management

Agencies with exposure in multiple thematic areas will be given preference.

- c. Any Sub-letting, sub-contracting and/or outsourcing of the activities shall not be allowed. **Documents to be submitted:** Copies of previous project completion and work experience details.
- d. A self-declaration (on the letter head) that the agency does not discriminate based on race, color, religion, sex, national origin, age, sexual orientation, gender identity, disability, genetic information, citizenship, veteran or marital status, or any other basis prohibited by law.
- e. The Agency should not have been blacklisted by any Government Agency/PSU/Central/State agency or under a declaration of ineligibility for fraudulent or corrupt practices. **Documents to be submitted:** Declaration from the current authorized signatory of the company.

The agency must also submit the following documents (soft copies) with the proposal:

- Copy of the RFP shall be submitted with authorized signature and official seal on each and every page of the RFP by the agency.
- Audited Annual financials should be submitted as per the proposal format
- Self-attested copy of Registration Certificate, tax-exempt status under 12 A, Section 80(G), PAN Card, IT Returns for last 3 consecutive financial years, Audited Financial Statements for last 3 consecutive financial years, Annual reports of activities for last 3 consecutive financial years and Memorandum of Association/ Trust Deed/ Rules & Regulations/Bye-Laws.

The agency must also submit the remaining documents and policies (soft copies) as mentioned in the document checklist

7. Evaluation Process:

- a. SBI Foundation will shortlist the proposals based on its internal Shortlisting criteria. SBI Foundation will shortlist the proposals based on the Shortlisting criteria as mentioned on Page No. 10 of the RFP titled 'Selection Criteria for RFP'.
- b. The Internal Committee of SBI Foundation shall evaluate the shortlisted proposals based on the parameters defined on Page No. 10 titled 'Selection Criteria for RFP' of the RFP and submit its recommendation to the Competent Authority whose decision shall be final in all aspects.

8. Grant Terms and Schedule:

- a. Grant will be released on a quarterly/half yearly basis on satisfactory performance by SBI Foundation and submission of quarterly reports (activity and financial utilisation) duly signed by the authorized signatory and duly certified by the auditors of the successful agency. Brief monthly update on activities conducted would also be required to be submitted.
- b. All terms regarding to the grant will be in accordance to the amendment to the Companies act 2013, with effect from 22nd January 2021 and any further enactments by the government shall be binding on all the stake holders.
- c. Any unutilised disbursement lying with the agency at the end of the Financial Year i.e. on 31st March of the preceding year shall be promptly intimated and refunded to SBI Foundation, not later than 30 days from the closure of the Financial Year i.e. on or before 10th April.
- d. A separate bank account (preferably a savings bank account) in State Bank of India for the purpose of this grant and proof of the same should be furnished to SBI Foundation. All receipts and payments related to the said project must be routed through this account.
- e. SBIF will release the grant, subject to verification of the reports submitted by the successful agency and subsequent approval by the Competent Authority, on submission of invoice and all other supporting documents being in order.
- f. A grant agreement/MoU will be executed between SBIF and grantee with details of additional terms and conditions. The Project will be executed as per the terms and conditions of the grant letter or MoU and shall be binding on the Agency.

9. Penalty

- a. SBIF shall be at liberty to impose penalties such as cancellation of awarded grant, if the agency indulges in fraudulent activities, malpractices and male fides. In case of the said situation, SBIF shall blacklist the implementing agency in its books and shall share the information with Ministry of Corporate Affairs for further course of action.

10. Non-Disclosure Agreement (NDA)

- a. Selected agencies will have to sign the Non-Disclosure Agreement (Annexure) with SBIF.

11. Transfer of RFP

- a. The RFP document is not transferable.

12. Proposal Preparation Costs

- a. The agency shall submit proposal at its own cost and SBIF shall not be held responsible for any cost incurred by the agency. Submission of proposal does not entitle the agency to claim any cost and rights over SBIF and SBIF shall be at liberty to cancel any or all proposals without giving any notice. All materials submitted by the agencies shall be the absolute property of SBIF and no copyright/patent, etc. shall be entertained by SBIF.

13. SBIF's right to terminate the process

- a. SBIF may terminate the RFP process at any time and without assigning any reason thereof. SBIF reserves the right to amend/edit/add/delete any clause of this Proposal Document. However, this will be informed to all and will become part of the RFP.

14. Submission of Proposals

The proposal submission shall comprise of the duly filled in proposal format uploaded on the website, along with all the annexures as mentioned in the document checklist uploaded on website.

15. Late Proposals

Any proposals received by SBIF after the deadline for submission of proposal shall be declared late and will be rejected and returned unopened to the agency at the discretion of SBIF.

16. Disclaimer:

- i. The information contained in this RFP document or information provided subsequently to implementing agencies whether verbally or in documentary form/email by or on behalf of SBI Foundation is subject to the terms and conditions set out in this RFP document.
- ii. This RFP is not an offer by SBI Foundation, but an invitation to receive responses from the eligible implementing agencies.
- iii. The purpose of this RFP is to provide the implementing agencies with information to assist preparation of their proposals. This RFP does not claim to contain all the information each implementing agency may require. Each implementing agency should conduct its own investigations and analysis and should check the accuracy, reliability and completeness of the information

contained in this RFP and where necessary obtain independent advices/clarifications. SBI Foundation may in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this RFP.

- iv. The SBI Foundation, its employees and advisors make no representation or warranty and shall have no liability to any person, including any Applicant under any law, statute, rules or regulations or tort, principles of restitution or unjust enrichment or otherwise for any loss, damages, cost or expense which may arise from or be incurred or suffered on account of anything contained in this RFP or otherwise, including the accuracy, adequacy, correctness, completeness or reliability of the RFP and any assessment, assumption, statement or information contained therein or deemed to form or arising in any way for participation in this process.
- v. The SBI Foundation also accepts no liability of any nature whether resulting from negligence or otherwise, however caused arising from reliance of any implementing agency upon the statements contained in this RFP.
- vi. The issue of this RFP does not imply that SBI Foundation is bound to select an implementing agency or engage an agency and SBI Foundation reserves the right to reject all or any of the implementing agencies or proposal without assigning any reason whatsoever.
- vii. The implementing agency is expected to examine all instructions, forms, terms and specifications in the RFP Document. Failure to furnish all information required by the RFP or to submit a proposal not substantially responsive to RFP in all respects will be at the implementing agency's risk and may result in rejection of the proposal.

17. Modification and Withdrawal of Proposals:

- xiv. The implementing agency may modify or withdraw its proposal after the proposal submission, provided that written notice of the modification, including substitution or withdrawal of the proposal, is received by SBI Foundation, prior to the deadline prescribed for submission of proposals.
- xv. No modification in the proposal shall be allowed, after the deadline for submission of proposal.

SBIF shall award the contract to the selected/identified agency at the Quality & Cost Based Selection (QCBS) method. Allocation of marks will be done by assigning weightage to Technical Proposals (80%) and Financial Proposal (20%). The full marks will be 100.

Scope of Work

Project locations: List of Districts

Sl.	States	Districts
1	Bihar	Araria, Madhepura, Purnea, Supaul
2	Jharkhand	Garhwa, Jamtara, Latehar, Pakur, Palamau, Sahibganj
3	Uttar Pradesh	Basti, Maharajganj, Sant Kabir Nagar
4	Madhya Pradesh	Chhatarpur, Damoh, Katni, Panna, Tikamgarh, Umaria, Guna, Sheopur Kala, Shivpur
5	Odisha	Bargarh, Bolangir, Kandhamal, Koraput, Malkangiri, Naarangpur, Nuapada, Nayagarh, Rayagada, Sambalpur, Sundergarh
6	Assam	Karbi Anglong, North Cachar Hills, Udalguri, West Karbi Anglong
7	Chhattisgarh	Dantewada, Bastar (Jagdalpur), Korba, Bijapur, Narayanpur, Sukma, Kondagaon
	UTs	Districts
8	Ladakh	Kargil, Leh
9	Dadra & Nagar Haveli & Daman & Diu	Dadra and Nagar Haveli, Daman
10	Jammu and Kashmir	Kishtwar, Poonch, Rajouri, Ramban, Bandipora, Baramulla, Kulgam, Kupwara, Pulwama, Reasi
11	Andaman & Nicobar Islands	Nicobars, North And Middle Andaman, South Andamans
12	Puducherry	Puducherry, Karaikal

The agency can submit **only 1 proposal (Any 1 District from the above 'List of Districts' only)** during this RFP process. However, the agencies can give an alternate project District (Any 1 District from the above 'List of Districts' only) in the relevant section under **Key Information Sheet** attached as Annexure- VI. The alternate project District is optional and maybe be considered by the competent authorities, if the agency meets the required criteria for the alternate project State/UT. (Project District and Alternate Project District can be from different State/UT but only from the above 'List of Districts')

Implementation Model

SBI Foundation aims to create a model cluster of 5 (neighbouring) villages by integrated development approach. The details of each of the activities to be undertaken are attached as Annexure- VII (Guidelines on Program Activities).

Selection Criteria for Agencies

The evaluation of the agencies shall be done by the competent authority on following parameters:

A. Project

1. Alignment with Gram Seva program objectives
2. Clear & concise detailing of the proposed solution, implementation plan & outcomes.
3. Innovation in the project.

4. Risk-mitigation measures.
5. Comprehensiveness of the Log frame & Project timelines.
6. Project Monitoring & Evaluation Process.
7. Proportion of admin & overheads costs, in comparison to the total project budget.
8. Project exit strategy & sustainability of the solution.

B. Experience

1. The agencies should have a minimum 10 years of existence on the date of publication of this RFP.
2. The agencies should have strong presence (minimum 3 years) in the proposed project State/UT.
3. The agencies having demonstrated capability to improve measurable outcomes to ensure effectiveness and efficiency of the intervention will be preferred.
4. The agencies must have an in-house team for project implementation, with more than 5 permanent employees.
5. Preference to be given to agencies who have experience in implementing integrated/holistic village development projects.

C. The Agency shall be rejected if:

1. Annual revenue of the agency for a cumulative of the last 3 years is less than 5 Crores
2. It has political or religious associations
3. Does not have the due diligence documents mentioned in Annexure II
4. The number of board members is less than 3
5. The number of permanent employees is less than 5
6. The individual donors are among the top 3 donors

Guidelines for Proposal

The Proposal should comprise of the following:

1. The proposals must be direct, concise, and complete. All information not directly relevant to this RFP should be omitted. The implementation plan should be mentioned in a step-by-step approach, Log frame with means of verification and Work plan with clear timelines should be part of the proposal. SBIF will evaluate the agency's proposal based upon its clarity and the directness of its response to the requirements of the project as outlined in this RFP.
2. Prices shall be quoted entirely in Indian Rupees. The price quoted would be inclusive of all taxes, duties, charges, and levies as applicable. The detailed financials have to be submitted including cost breakups.
3. The proposed projects that work with and are supported by the government will be preferred.
4. The proposed interventions should be sustainable and scalable and can be replicated across geographies and demographics.
5. The agencies having demonstrated capability to improve measurable outcomes to ensure effectiveness and efficiency of the intervention will be preferred.
6. Projects should be inclusive in nature, targeting beneficiaries from all strata and groups of the society

Annexure I (Non-Disclosure Agreement)

Non-Disclosure Agreement

This Non-Disclosure Agreement ("Non-Disc") is made and entered intoday of month year (effective date) by and between SBI Foundation (SBIF) and (Non-profit organizations Name) and whereas, SBIF and (Hereinafter referred to as service provider) have entered into a Non-Disclosure Agreement effective from DD/MM/YYYY.

And,

Whereas, each party desires to disclose to the other party certain information in oral or written form which is proprietary and confidential to the disclosing party, ("CONFIDENTIAL INFORMATION").

NOW, THEREFORE, in consideration of the foregoing and the covenants and agreements contained herein, the parties agree as follows:

1. Definitions (As used herein):

(a) The term "Confidential Information" shall include, without limitation, all information and materials, furnished by either Party to the other in connection with -citizen/users/persons/customers data, products and/or services, including information transmitted in writing, orally, visually, (e.g. video terminal display etc.) or on magnetic or optical media, and including all proprietary information, customer & prospect lists, trade secrets, trade names or proposed trade names, methods and procedures of operation, commercial or marketing plans, licensed document know-how, ideas, concepts, designs, drawings, flow charts, diagrams, quality manuals, checklists, guidelines, processes, formulae, source code materials, specifications, programs, software packages, codes and other intellectual property relating to the disclosing party's data, computer database, products and/or services. Results of any tests, sample surveys, analytics, data mining exercises or usages etc. carried out by the receiving party in connection with the SBIF's Information including citizen/users/persons/customers personal or sensitive personal information as defined under any law for the time being in force shall also be considered Confidential Information.

(b) The term, "SBI Foundation (SBIF)" shall include the officers, employees, agents, consultants, contractors and representatives of SBIF.

(c) The term, "Service Provider" shall include the directors, officers, employees, agents, consultants, contractors and representatives of _____ (Company Name), including its applicable affiliates and subsidiary companies.

2. Protection of Confidential Information:

With respect to any Confidential Information disclosed to it or to which it has access, Service Provider affirms that it shall:

(a) Use the Confidential Information as necessary only in connection with Project and in accordance with the terms and conditions contained herein;

(b) Maintain the Confidential Information in strict confidence and take all reasonable steps to enforce the confidentiality obligations imposed hereunder, but in no event take less care with the Confidential Information than the parties take to protect the confidentiality of its own proprietary and confidential information and that of its clients;

(c) Not to make or retain copy of any commercial or marketing plans, citizen/users/persons/customers database, Proposals developed by or originating from SBIF or any of the stakeholders of SBIF except as necessary, under prior written intimation from SBIF, in connection with the Project, and ensure that any such copy is immediately returned to SBIF even without express demand from SBIF to do so;

(d) Not disclose or in any way assist or permit the disclosure of any Confidential Information to any other person or entity without the express written consent of the other party; and

(e) Return to the other party, or destroy, at SBIF's discretion, any and all Confidential Information disclosed in a printed form or other permanent record, or in any other tangible form (including without limitation, all copies, notes, extracts, analyses, studies, summaries, records and reproductions thereof) immediately upon the earlier to occur of (i) expiration or termination of either party's engagement in the Project, or (ii) the request of the other party therefore.

(f) Not to discuss with any member of public, media, press, any or any other person about the nature of arrangement entered between SBIF and Service Provider or the nature of services to be provided by the Service Provider to the SBIF.

3. Onus: Service Provider shall have the onus of proving that any disclosure or use inconsistent with the terms and conditions hereof falls within any of the foregoing exceptions.

4. Exceptions: These restrictions as enumerated in section 1 of this Agreement shall not apply to any Confidential Information:

(a) Which is independently developed by Service Provider or lawfully received from another source free of restriction and without breach of this Agreement; or

(b) After it has become generally available to the public without breach of this Agreement by Service Provider; or

(c) Which at the time of disclosure to Service Provider was known to such party free of restriction and evidenced by documentation in such party's possession; or

(d) Which SBIF agrees in writing is free of such restrictions.

(e) Which is received from a third party not subject to the obligation of confidentiality with respect to such Information;

5. Remedies: Service Provider acknowledges that (a) any actual or threatened disclosure or use of the Confidential Information by Service Provider would be a breach of this agreement and may cause immediate and irreparable harm to SBIF; (b) Service Provider affirms that damages from such disclosure or use by it may be

impossible to measure accurately; and (c) injury sustained by SBIF may be impossible to calculate and remedy fully. Therefore, Service Provider acknowledges that in the event of such a breach, SBIF shall be entitled to specific performance of Service Provider's obligations contained in this Agreement. In addition, Service Provider shall indemnify SBIF of the actual and liquidated damages which may be demanded by SBIF. Moreover, SBIF shall be entitled to recover all costs (including reasonable attorneys' fees) which it or they may incur in connection with defending its interests and enforcement of legal rights arising due to a breach of this agreement by Service Provider.

6. Need to Know: Service Provider shall restrict disclosure of such Confidential Information to its employees and/or consultants with a need to know (and advise such employees of the obligations assumed herein), shall use the Confidential Information only for the purposes set forth in the Agreement, and shall not disclose such Confidential Information to any affiliates, subsidiaries, associates and/or third party without prior written approval of the disclosing party.

7. Intellectual Property Rights Protection: No license to a party, under any trademark, patent, copyright, design right, mask work protection right, or any other intellectual property right is either granted or implied by the conveying of Confidential Information to such party.

8. No Conflict: The parties represent and warrant that the performance of its obligations hereunder do not and shall not conflict with any other agreement or obligation of the respective parties to which they are a party or by which the respective parties are bound.

9. Authority: The parties represent and warrant that they have all necessary authority and power to enter into this Agreement and perform their obligations hereunder.

10. Dispute Resolution: If any difference or dispute arises between the SBIF and the Service Provider in connection with the validity, interpretation, implementation or alleged breach of any provision of this Agreement, any such dispute shall be referred to the Managing Director, SBIF.

11. Entire Agreement: This Agreement constitutes the entire understanding and agreement of the parties, and supersedes all previous or contemporaneous agreement or communications, both oral and written, representations and understandings among the parties with respect to the subject matter hereof.

12. Amendments: No amendment, modification and/or discharge of this Agreement shall be valid or binding on the parties unless made in writing and signed on behalf of each of the parties by their respective duly authorized officers or representatives.

13. Binding Agreement: This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and permitted assigns.

14. Severability: It is the intent of the parties that in case any one or more of the provisions contained in this Agreement shall be held to be invalid or unenforceable in any respect, such provision shall be modified to the extent necessary to render it, as modified, valid and enforceable under applicable laws, and such invalidity or unenforceability shall not affect the other provisions of this Agreement.

15. Survival: Both parties agree that all of their obligations undertaken herein with respect to Confidential Information received pursuant to this Agreement shall survive till perpetuity even after any expiration or termination of this Agreement.

16. Term: This Agreement shall remain valid up to 1 years from the "effective date".

IN WITNESS HEREOF, and intending to be legally bound, the parties have executed this

Agreement to make it effective from the date and year first written above.

For SBIF India,

For Service Provider

Name of the authorized signatory

Name of the authorized signatory

Designation:

Designation:

Witnesses:

1. _____

2. _____

Annexure II (Due Diligence Document Checklist)

Due Diligence Document Checklist

Sl.	Documents
1	Proposal form
2	Two Donor Feedbacks
3	Memorandum of Association/Trust Deed/Rules and Regulations Memorandum of Association/Trust Deed/Rule
4	Registration Certificate
5	12A Registration
6	80G Registration
7	FCRA Certificate
8	PAN
9	Address Proof
10	IT – Returns (Last 3 Years)
11	Audited Reports (Last 3 Years)
12	Self-Declaration (Self Declaration Format.docx)
13	Annual Reports (Last 3 Years)
14	Organisation Profile
15	Brief Bio Data (incl. Education and Work ex) of Board Members
16	Brief Bio Data (incl. Education and Work ex) of Top Management
17	Minutes of Board Meeting (last two)
18	Personal/HR Policy: Including Remuneration policy for Directors/Trustees; Remuneration policy for CEO, COO, Secretary etc.; Promotion, Increment, Role assignment policy.
19	Finance Policy: Including procurement policy, Purchase/Sale of Assets/Investments.
20	Organogram of Organization
21	Detailed Budget sheet in Excel
22	Third party evaluation/Audit reports/Impact Assessment
23	MIS for planning, tracking & reviewing
24	Profile of Key leaders and Founders
25	Press reports
26	Awards and Recognitions Pics/link
27	Feedback mechanism
28	Monitoring Mechanism/Software in place
29	GST certificate
30	Form CSR 1

Annexure III (Evaluation Form)

Technical Form (Evaluation Form) –

Section 1: Organisation Details & Section 2: Project Proposal)
The proposal shall be evaluated out of 100.

Link: [Annexure-III Evaluation Form.docx](#)

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Annexure IV (Financial Format)

Financial Format

Link: [Annexure-IV Financial Format.xlsx](#)

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Annexure V (Format of Agreement/MoU)

Format of Agreement/MoU

MoU & Grant Letter Format Link: [Annexure-V Format of Agreement & MoU.pdf](#)

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Annexure VI (Key Information Sheet)

Key Information Sheet

Link: [Annexure-VI Key Information Sheet.xlsx](#)

SBI FOUNDATION

Annexure VII (Guidelines on Program Activities)

Guidelines on Program Activities

Link: [Annexure-VII Guidelines on program activities F.pdf](#)

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