Request for Proposal (RFP) under Corporate Social Responsibility

SBI Foundation's
NGO Capacity Building Programme

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SBI Foundation

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Introduction

SBI Foundation (SBIF) is the corporate social responsibility (CSR) arm of the State Bank of India, established in 2015 as a Section-8 company to drive strategic, scalable social interventions across India.

Guided by a vision to improve socio-economic wellbeing and build self-reliant communities, SBIF designs and implements high-impact programmes across multiple thematic areas: **Education, Healthcare, Livelihoods & Entrepreneurship, Environment, Sports, Rural Development, Disability & Inclusion, and Women's Empowerment**.

SBIF pursues impact through strategic partnerships with non-profit partners, combining SBI's reach with specialist implementation agencies and technology collaborators to scale solutions that are measurable, sustainable and aligned with national development priorities.

About the Request for Proposal (RFP)

SBI Foundation (SBIF) seeks to engage non-profit/non-profit in consortium with expert agencies (for-profit organisations/agencies) for **SBIF's *NGO Capacity Building Programme*** for building the capabilities/capacities of not-for-profit organisations in the development space.

The initiative is aimed at establishing a robust platform for the non-profits to build their capacities in the major operational domains such as compliance & legal, public policy, fundraising, organisational development & strategy, monitoring and evaluation and etc, which will give the non-profit an upper hand in highlighting the effectiveness of its endeavours at a bigger and better scale.

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Invitation for Proposals

SBI Foundation hereby invites non-profit/non-profit in consortium with expert agencies (for-profit organisations/agencies) to submit a proposal for ***SBIF NGO Capacity Building Programme*** for pan India locations.

The RFP document is available on SBI Foundation's website: https://sbifoundation.in/Request-for-Proposals

NGOs/Agencies are requested to study this RFP document carefully and check their eligibility with the 'Document Checklist' and other criteria mentioned in the RFP 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).

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Key Events and Dates

Sr. No.	Process step*	Timeline*/Details
1	Publication date of the RFP	14th October 2026
2	Last Date for requesting clarifications through email	24th October 2026
3	Last Date and Time for submission of proposals	15th November 2026
4	Communication to shortlisted participants to make presentations	December 2026
5	Tentative date for Presentations to be made by shortlisted candidates	December 2026
6	Final communication of selection	January 2027
7	Place of Submission of Proposals (Online Submission only)	newinitiatives@sbifoundation.co.in **Soft copies to be sent by 15th November 2026 with subject line** **"SBIF NGO CAPACITY BUILDING PROGRAMME <NGO NAME>"** Only Shortlisted NGOs/Agencies will be contacted, and they shall be required to submit Hard copies at a later date

Instructions to the Agencies

1. **Submission of Proposal**

   a. The NGO/agency can only submit one proposal at a time. Multiple submissions will be disqualified.
   b. The NGO/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.
   c. NGOs/not-for-profit organisations can also submit proposals in consortium with for-profit agencies (the respective agencies must have at least 5 years of experience in capacity building of NGOs/Organisations).

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 email id newinitiatives@sbifoundation.co.in by **15th November 2026**. The shortlisted NGOs/non-profit in consortium with expert agencies will be requested to submit hard copies at a later date.

   c. The response to this RFP should be complete in all respects. 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 newinitiatives@sbifoundation.co.in with a subject line SBIF NGO Capacity Building by < NGO/Non-Profit Name>, before **24th October 2026**. 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, 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

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appropriate action.

5. **Language of Proposal:**
   a. Proposals should be submitted in English language only.

6. **Documents (Scan copy) to be submitted and Pre-qualification criteria**:
   a. The Agency should be a non-profit organisation/trust/society/private entity registered in India, and if the non-profit is applying for the RFP in consortium with an expert agency (for-profit agencies/organisations), both the organisations should be registered in India.

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

   b. Proposal Evaluation form shall be submitted with authorised signature and official seal on each and every page of the Proposal Evaluation Form and accompanying documents (as per the document checklist) by the agency.

The organisation must have a **minimum of 5 years of experience** building the capacity of non-profits/NGOs (if the organisation/agency is applying for the RFP in consortium with an expert agency, the experience of each organisation must be minimum of 5years in building capacities of the non-profits/NGOs). The broad scope of expertise required includes:

- **Proven experience in NGO Capacity Building initiatives/projects**, particularly in the development space.
- **Proven experience of executing holistic Not-for-profit/NGO capacity building projects/initiatives with essential services**, including designing modules/toolkits/templates/ready-to-use frameworks catering to the requirements of the not-for-profits/NGOs, end to end monitoring of such initiatives, conducting robust cohort based virtual/In-person workshops, interactive peer learning sessions (inclusive of live case studies), one-on-one hybrid coaching/mentoring calls pertinent to organisational capacity building & etc. The NGOs/agencies must strictly submit proposals for building the capacities of NGOs/Non-profits only.

   c. A self-declaration (on the letter head) that the Grantee does not discriminate based on race, colour, religion, sex, national origin, age, sexual orientation, gender identity, disability, genetic information, citizenship, veteran or marital status, or any other basis prohibited by law.

   d. 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 NGO/agency must also submit the remaining documents and policies (soft copies) as mentioned in the document checklist

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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 mentioned on Page No. 16 of the RFP titled 'Selection Criteria for Agencies'.

b. The Internal Committee of SBI Foundation shall evaluate the shortlisted proposals based on the parameters defined on Page No. 16 titled 'Selection Criteria for Agencies' 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 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 after 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, including cancellation of awarded grant, if the agency indulges in fraudulent activities, malpractices and mala 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.

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10. Non-Disclosure Agreement (NDA)

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

11. Transfer of RFP

The RFP document is not transferable.

12. Proposal Preparation Costs

The agency shall submit proposals 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.

12. 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.

13. 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.

14. 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 in the 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

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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, howsoever 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 respect will be at the implementing agency's risk and may result in rejection of the proposal.

15. Modification and Withdrawal of Proposals:

i. 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.

ii. No modification in the proposal shall be allowed, after the deadline for submission of proposal.

SBIF shall award the contract/project 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%).

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Scope of Work

The capacity building program has been identified as a strategic lever to enhance the effectiveness and scalability of the social impact initiatives delivered by participating NGOs. It will serve the following objectives:

- Strengthen the governance, systems and operational capacities of NGOs across compliance, leadership, finance, strategy, MEL etc.
- Customize learning and development modules to the maturity, size and learning needs of each NGO. A mix of mandatory and need based modules.
- Build leadership, talent and long-term organisational sustainability.
- Create a measurable, replicable model that feeds SBI Foundation's programme pipeline.

1. Capacity Building Program

The capacity building program will be delivered in **three formats:**

1.1. **Incubation Program** - A beginner level comprehensive program for a duration of 6-9 months encompassing all functional areas of Organizational Development, especially on Systems & Processes, Strategy, MEL, Program Design, fundraising etc. **for small NGOs**

1.2. **Acceleration Program -** A customized program with 1 mandatory module on compliance covering Statutory & Regulatory Compliance, Financial Management Compliance, Internal Governance, Board Effectiveness etc. for a duration of 3-4 months and, 1-2 optional modules offered from a bouquet of modules on Organisational Development - Strategy, Leadership Planning, Fundraising, MEL, Technology etc. **for mid-size NGOs** for a duration of 3-4 months.

1.3. **Advance Level Capacity Building-** A need based program with high level advanced module offered by experts on Strategy, Fundraising, Public Policy, Tech & AI etc. best suited for **large scale NGOs** for a duration of 3-4 months.

Participants shall be from SBI Foundation's existing partner NGOs (approximately 70%) and external/new NGOs (approximately 30%). The programme thereby creates a robust pipeline of capable implementation partners for future SBI Foundation partnerships.

The brief on all three program types is mentioned here under:

Capacity Building Programme	Annual revenue	Focus	Programme format
1. NGO Incubation Program For Emerging / Small NGOs (10-20% of our portfolio)	Less than ₹5 Cr	Foundational skills and systems	• Comprehensive program for operating a non-profit organisation encompassing capacity building on Systems & Processes, Strategy, MEL, Program Design fundraising etc. for small NGOs • Cohort of 20–25 NGOs per partner for a duration of 6-9 months

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2. NGO Acceleration Program For Mid to Large NGOs (70-80% of our portfolio)	₹5 Cr and above, with at least 5 years of existence	Systems & compliance and optional need-based modules	• Tailored program consisting of 1 mandatory compliance module and 1-2 intermediate-level need based modules out of – Strategy, Leadership Planning, Fundraising, MEL, Technology etc. • Mandatory module will be offered to 300 NGOs. Course duration- 3-4 months per module. • Optional modules will be offered on need based on registration. Cohort size to be 25-30 NGOs
3. Advance Capacity Building For Mature NGOs (10-20% of our portfolio)	More than ₹15 Cr	Strategic leadership, innovation and sustainability	• Advanced capacity building modules on Strategy, Fundraising, Public Policy, Tech & AI etc. will be offered to large scale NGOs; NGOs register module by module, seats are limited. • The cohort duration for each module will be 3-4 months

2. Delivery, Assessment and Certification

- **Batch size:** One dedicated cohort of 20-25 NGOs per implementing partner for the incubation program and advanced capacity building program. The cohort size for the mandatory module under the acceleration program to be jointly finalized.
- **Participant composition:** Minimum 1-3 staff from each NGO, with role-based participation.
- **Delivery modes:** Hybrid (At least one in-person session/Workshop, remaining online sessions/coaching calls)
- **Learning approach:** Workshops, online/offline coaching calls, cohort-based training, one-on-one learning sessions, hands-on tools, templates, case studies and practical assignments. Minimum no. of workshops/calls etc. in every module or frequency per month to be decided jointly
- **Assessment:** pre- and post-programme assessments, followed by impact checks as NGOs apply the learning internally and with their stakeholders and beneficiaries.
- **Certification:** Participants/NGOs completing modules receive a sector-recognised certificate of completion; titles are defined with the implementing agency.
- **Branding:** All cohorts/programs operate as the "SBI Foundation NGO Capacity Building Programme".

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3. Additional Information for applicants:

Parameter	Incubation Programme	Acceleration Programme	Advance Modules Programme
Beneficiary NGOs shortlisted (from 300+ partners)	10-20% of our portfolio 30-60 NGOs	Approx. 70–80% of our portfolio (mid-size NGOs) 200-250 NGOs	Top 10–20% of portfolio NGOs by turnover (above ₹15 Cr); limited seats 30-50 NGOs
Mode of Delivery	**In-person, Hybrid and Online delivery of capacity building curriculum** 1. One-on-one consultation/Coaching Calls 2. In-person workshop/Session (At least 1 for each cohort)	**In-person, Hybrid and Online delivery of capacity building curriculum** 1. One-on-one consultation/Coaching Calls 2. In-person workshop/Session (At least 1 for each cohort)	**In-person, Hybrid and Online delivery of capacity building curriculum** 1. One-on-one consultation/Coaching Calls 2. In-person workshop/Session (At least 1 for each cohort)
Programme duration	1 year – 2 years 6–9 months per cohort	1 year – 2 years 3–4 months per module	1 year- 2 years 3–4 months per cohort
Cohort size	20–25 NGOs	25–30 NGOs for optional modules; mandatory module cohort to be jointly finalized	20–25 NGOs
Participating NGO contribution	Not mandatory	Not mandatory	10–25% of module cost, plus time and resources

- **Travel & accommodation:** Travel is to be borne by NGOs. Accommodation to be arranged by SBI Foundation at SBI LD & SBI Academy.
- **Co-funding:** Encouraged across all tracks; mandatory (10–25% of module cost) only for NGOs in Advance Capacity Building Modules.

4. Programme Flow

- **Step 1- Baselining:** Assess each NGO's organisational capacity at entry.
- **Step 2- Dedicated profiling and need identification:** Build a dedicated profile of each NGO's strengths, gaps and priorities, and identify the OD needs of each NGO
- **Step 3- Capacity Building Program:** NGO undergoes the Incubation/acceleration/advance capacity building program
  - **Compliance module (mandatory):** Every NGO in the Acceleration cohort, and every other SBI Foundation partner NGO, completes this module
  - **Need-based modules:** Each NGO selects 1–2 key focus areas for in-depth support — such as Strategy, MEL, Fundraising, etc. based on the needs identified in Step 2 delivered in a hybrid mode
- **Endline:** Each NGO is reassessed against its baseline.

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5. Implementation Process at SBI Foundation

5.1. Partner selection: SBIF will select implementing partners through RFP. Different partners will be selected for incubation program, acceleration program (mandatory module) and for advanced capacity building program. NGOs and expert organization in consortium with non-profit partners can apply for only 1 out of 3 programs. Implementing Partners can apply for a project period of 1 year - 2 years for capacity building of multiple cohorts.

5.2. Programme announcement: Once implementing partners are selected, the SBIF capacity building programme will be announced to NGOs.

5.3. Registration: All three programs will be open for registration. The selection will be done jointly by SBIF and the implementing partners based on a thorough process including interview, survey, time commitment etc.

5.4. Content: The implementing partners will bring their content, however, SBIF will provide inputs on customization of content to ensure it covers the objectives of the program.

5.5. Locations: The training program will commence with one in-person sessions run at five mandatory cities (Delhi, Mumbai, Hyderabad, Kolkata, Bengaluru) and then it is continued in a hybrid model; other locations are added later based on NGO concentration.

Category	Locations	Remarks
Mandatory	Delhi, Mumbai, Hyderabad, Kolkata, Bengaluru	In-person orientation and completion sessions for Incubation, Acceleration and Advance Modules are held at these five locations, leveraging SBI Learning & Development Centres / SBI Academies
Optional	To be decided later	Additional locations are pitched later where a sufficient concentration of NGOs is nearby

Important Notation: In-person orientation and completion sessions across all three tracks Incubation, Acceleration and Advance Modules: are held at five mandatory locations. Additional locations are decided later and pitched where a sufficient concentration of NGOs is nearby.

The agency must carry out the task mentioned:

1. Design and deliver the capacity building programme in pertinence to the scope of work.
2. Deliver a mixed-cohort-based hybrid (virtual & in-person workshops, 1:1 mentoring/coaching), case-based (live case studies) learning, peer exchange (opportunities for networking), and mentoring.
3. Conduct learning needs assessment for each cohort.
4. Co-designing the criteria for beneficiary identification
5. Ensure detailed documentation, reporting, and dissemination (Inclusive of Toolkits, templates and ready-to-use frameworks).
6. Administer and undertake a strong monitoring and evaluation framework to track progress, gauge impact & implementation, and ensure continuous programme improvement.

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Technical specifications of the proposed NGO capacity building programme are given below.

Project Budget: Under this project, the Agency is required to submit the budget pertinent to the project management component:

- **Project Management Work** – This budget will cover expenses related to the project management team, trainer/coach salary, module design, monitoring-related expenses, in-person workshops/sessions for participating NGOs, reporting & documentation, and admin cost for auditing, baseline, midline and endline assessment etc.

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Selection Criteria for Agencies

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

A. Project Proposal

1. Alignment with "**SBI Foundation NGO Capacity Building Programme**" scope of work.
2. Clear and concise detailing of implementation plan and timelines.
3. Risk-mitigation measures.
4. Project Monitoring & Evaluation Process.
5. Proportion of admin and overhead costs, in comparison to the total programme budget

B. Experience

1. The implementing NGO/agency should have a minimum of 5 years of existence on the date of publication of this RFP.
2. The implementing NGO/agency having expertise and knowledge of NGO Capacity building related work to ensure the effectiveness and efficiency of the intervention will be preferred.
3. The implementing NGO/agency must have completed at least 5-10 assignments/projects/initiatives of a similar nature.
4. The agencies will be assessed on the following additional criteria:

Criterion	What is assessed
Cost per NGO / beneficiary	Cost-effectiveness, including total cost per NGO supported and per-module costing
Methodology proposed	Curriculum design, cohort delivery, coaching and mentoring, assessments, implementation support and certification
Alignment with RFP Scope of Work	Coverage of the applied track, module areas, cohort structure, duration and deliverables in this Scope of Work
Feedback from donors	Feedback and references from donors/funders of the applicant's earlier NGO capacity-building programmes
Third-party external report	Independent evaluations or assessments of the applicant's earlier capacity-building programmes
Report on demonstrated impact	Before-and-after evidence showing the extent to which participating NGOs took up the learning

C. The Agency shall be rejected if:

1. If the proposal submitted by the implementing agency is not aligned with the scope of work of the pertinent RFP.
2. The cumulative annual revenue of the agency for the last 3 financial years (FY 2023-24, 2024-25 & 2025-26 is less than Rs. 5.00 Crores.
3. It fails to furnish the due diligence documents mentioned in Annexure II.

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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, **theory of change framework** should be outlined in a way that explicitly maps programme's inputs, outputs and impact at large, 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 must 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 NGOs/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 society.

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Annexure I

Non-Disclosure Agreement

This Non-Disclosure Agreement ("Non-Disc") is made and entered into ..... day of …….. month …… year (effective date) by and between SBI Foundation (SBIF) and ..... (Non-profit/For-profit organizations/Agency 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.

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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 that 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;

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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 under standings 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

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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. _____

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Annexure II

Due Diligence Document Checklist

Sr.no	Documents
1	Evaluation Form (Proposal)
2	Two Donor Feedbacks
3	Memorandum of Association/Trust Deed/Rules and Regulations Memorandum of Association
4	Registration Certificate
5	12A Registration
6	80G Registration
7	FCRA Certificate (If available)
8	PAN
9	Address Proof
10	IT – Returns (Last 3 Years)
11	Audited Reports (Last 3 Years)
12	Self-Declaration
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 (if available)
30	CSR 1 Registration

***Note:** The NGO/Non-profit applying for the RFP in consortium with expert agencies (for-profit organisations), both the organisations need to furnish the above-mentioned documents while submitting the detailed proposal with SBI Foundation. (The documents highlighted in blue might not be applicable for expert agencies/for-profit organisations applying through consortium).*

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Annexure III

Technical Form (Evaluation Form) –

Section 1: Organisation/Agency Details

Section2: Programme Proposal - The proposal shall be evaluated out of 100.

Link: Technical Form (Evaluation Sheet).docx

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Annexure IV

Financial Format

Link: Financial Format.xlsx

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Annexure V

Format of Agreement/MoU

MoU & Grant Letter Format

Link: MOU Grant Letter

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