



Request for Proposal (RFP)

For

**Hiring of Agency
to
Design & Implement
a**

**CSR Program Management Software
(CSR – PMS)**

Prepared by:

**SBI Foundation
35, The Arcade, Ground Floor, World Trade Centre, Cuffe Parade,
Mumbai 400005**

[www.sbifoundation.in/RFP No./2025-26/](http://www.sbifoundation.in/RFP%20No./2025-26/)

INDEX

1. Introduction	2
2. Invitation for Proposals	2
3. Key Events and Dates	3
4. Instructions to the Agencies	3
5. Scope of Work	8
6. Selection Criteria for Agencies	17
7. Guidelines for Technical Proposal	19
8. Tech Forms.....	20
9. Annexure I.....	26
10. Annexure II.....	27
11. Annexure III.....	28
12. Annexure IV.....	29

1. Introduction

SBI Foundation

SBI Foundation (SBIF) has been incorporated to bring all the CSR activities of the State Bank Group under one umbrella and contributing in the efforts made by the State Bank Group in supporting and uplifting the underprivileged sections of society. The focus areas of SBI Foundation are Education, Healthcare, Rural Development, Livelihood & Entrepreneurship, Environment and Sustainability, Women Empowerment, Inclusion and Sports etc. SBI Foundation works in collaboration with reputed NGO partners to provide equitable development opportunities to people living in the poorest areas of the country.

So far, SBIF has impacted the lives of more than 20 million beneficiaries through all its programs/initiatives and aims to continue improving the socio-economic well-being of the society, particularly of the less fortunate and underprivileged members and enable them to live up to the potential that they all possess.

About the Request for Proposal (RFP)

SBIF intends to engage an agency to Design, Develop, Implement and Maintain a **CSR Project Management Software (CSR-PMS)**, envisaged to be an end to end program management software encompassing a centralized data management system, dashboard to capture the lifecycle of projects both in terms of programmatic and financial data for assessment, online approval system for multiple committees, interface with NGO partners to update progress, evaluation of progress by Monitoring team and Program team, etc. This document provides information to enable the agencies to understand the requirements of SBI Foundation for submitting their “Technical and Financial Bid”. SBI Foundation intends to empanel/engage the Institutions through an open competitive bidding process in accordance with the procedure set out herein.

2. Invitation for Proposals

SBI Foundation hereby invites Proposals for Hiring of Agency to Design, Develop, Implement and Maintain and Implement a CSR Project Management Software (CSR- PMS).

The RFP document is available at the 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 RFP Notice. 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 a full understanding of its terms, conditions, and implications.

Prospective agencies are requested to check the prequalification criteria before submission of the proposal.

3. Key Events and Dates:

Sr. No.	Information	Deadline
1	Publication date of the RFP	25 th April 2025
2	Last date to send in requests for clarifications (if any)	5 th May 2025
3	Response to the clarification by SBIF	7 th May 2025
4	Last Date and Time for Submission of Technical and Financial Proposals.	14 th May 2025
5	Password to be shared through email: coo@sbifoundation.co.in	15 th May 2025
6	Acknowledgment of Acceptance/Rejection of proposal	Information will be sent to only shortlisted agencies by 23 rd May 2025.
Request for Clarifications and Submission of Technical and Financial Proposal to be done on Info@sbifoundation.co.in		

4. Instructions to Agencies

4.1. Consortium and Joint Ventures:

Consortium, Joint venture, Subletting, Sub-contracting, and Outsourcing shall not be allowed.

4.2. Completeness of Response

- a. The agencies are requested to study all instructions, forms, terms, requirements, and other information in the RFP document carefully. Submission of the proposal shall be deemed to have been done after careful study and examination of the RFP document with a full understanding of its implications.
- b. 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 the rejection of its proposal.
- c. All completed formats should be sent to the SBI Foundation office by email to info@sbifoundation.co.in.

4.3. Submission of Proposals

(a) The proposal submission shall comprise of **Technical Proposal (Document A)**, along with all the required documents as mentioned in the Document Checklist (*Annexure I*).

[Shortlisted agencies will be asked to give a presentation covering technical aspects like Dashboard Features, Technical Clarity, Expertise in Understanding CSR Issues, Operational Support, Risk Management & Reporting Plan, etc.]

(b) The **Financial Proposal (Document B)** is to be filed separately, in a password-protected Excel sheet. Shortlisted agencies will be contacted at a later stage for the password for the financial evaluation of proposals.

Contents of the Financial Proposal

The Financial Proposal should clearly outline the following cost components:

1. **Software development/creation fee**
2. **Annual Support Services/Annual Maintenance Charges (for a period of five years)**
3. **Change Request Fee (if applicable)**
4. **Hosting & Infrastructure Fee (if applicable)**
5. **Any other applicable costs**
6. **Taxes and levies**

All proposals are to be shared via email only to **info@sbifoundation.co.in** before the due date, as mentioned. (*Refer: Key Events and Dates*). Password for the Financial Proposal to be shared through email on **coo@sbifoundation.co.in**.

4.4. Agency Inquiries/Clarifications

- a. The agency shall send their queries at: **info@sbifoundation.co.in** with the subject, **Hiring of Agency to Design and Implement a CSR Program Management Software (CSR – PMS)** (due date for submission of queries/clarifications as mentioned in the Key Events and Dates segment) Queries received after the aforesaid due date will not be responded/acted upon.
- b. Queries on the telephone, social media, or any other medium will NOT be entertained.

4.5. Re-submission of Proposal:

The agency can only submit one proposal for this particular RFP.

4.6. 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.

4.7. Language of Proposal:

Proposals should be submitted in English language only.

4.8. Documents to be Submitted & Qualification Criteria:

Sl. No.	Eligibility Criteria	Supporting Documents to be Furnished for compliance
1	The Agency shall be a Partnership Firm/Private Limited Company/Limited Liability Partnership Firm/MNC (Multinational Company)/Public Limited Company registered or incorporated in India etc.	The agency is required to submit supporting documents such as a Certificate of Incorporation/Registration/Memorandum of Association/Articles of Association/Registered Partnership Deed
2	The Applicant Should Have a Minimum Cumulative Annual Turnover of Rs. 2.00 Cr. from Indian Operations Over the Last three F.Y. (2022-23, 2023-24 & 2024-25).	Documents to be submitted: Last Three Years Annual Audited Financial Statements, and certificate/Audit Reports <u>Annexure II</u> . If the Audited B/S or P/L for 2024-25 is not ready, please submit CA Certified Provisional for the same.
3	The Bidder should have a valid PAN and GSTIN registration.	Documents to be submitted: GST Registration Certificate, PAN Card.

The agency must also submit the following documents with the proposal:

- a. A self-declaration (on the letterhead) that the Grantee 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. (**Annexure III**)
- b. Self–attested copy of GST Registration Certificate, PAN Card.

4.9. Evaluation Process:

The Internal Committee of SBI Foundation will evaluate the proposals based on the parameters outlined in the section titled 'Selection Criteria for RFP', and submit its recommendations to the Competent Authority, whose decision shall be final and binding. Following the evaluation of the Technical Proposals, shortlisted agencies will be invited to deliver a presentation on the technical

aspects. The final selection will be based on the cumulative score derived from the Technical Evaluation (Proposal and Presentation) and the Financial Proposal.

4.10. Penalty

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

4.11. Non-Disclosure Agreement (NDA):

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

4.12. Transfer of RFP:

The RFP document is not transferable.

4.13. Proposal Preparation Costs

The agency shall submit a 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.

4.14. Late Proposals

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

4.15. 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 the 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 advice/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 any agency or engage an agency and SBI Foundation reserves the right to reject all or any of the implementing agencies or proposals 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 the RFP in all respects will be at the implementing agency's risk and may result in the rejection of the proposal.

4.16. Modification and Withdrawal of Proposals:

- a. 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.
- b. No modification in the proposal shall be allowed after the deadline for submission of the proposal.

4.17. Award:

- a. Qualifying Agencies will be Shortlisted based on the Technical Evaluation by the Internal Committee of SBI Foundation.
- b. Shortlisted agencies will be asked to give a presentation covering technical aspects like Dashboard Features, Technical Clarity, Expertise in Understanding CSR Issues, Operational Support, Risk Management & Reporting Plan, etc.
- c. The final selection will be determined through a comprehensive evaluation of both technical (proposal + presentation) and financial scores. The agency offering the best value-balancing quality and cost-effectiveness will be selected.

5. Scope of Work:

The scope of work will include the following indicative requirements. These are subject to change and will be finalized through mutual agreement in the Service Level Agreement (SLA) at a later stage, post onboarding.

A. Design and Development (Summary of Requirements)

A.1. Proposal Submission and RFP Management

- Development of a dedicated module to enable NGOs to submit proposals through the portal.
- Facilitate initiation, processing, and tracking of Request for Proposal (RFP) cycles, including bid management and internal workflows.
- Enable automated acknowledgment emails, rejection/acceptance updates, and internal notifications to relevant users.

A.2. Core Platform Design and Development

- Design and development of a user-friendly, responsive application accessible via desktop, tablet, and mobile devices.
- Provision of a robust infrastructure to ensure scalability, flexibility, security, and high availability.
- Optimization of system performance to ensure 24/7 accessibility with minimal page load times.
- The agency will manage additional tasks ("Change Requests") that arise during the contract period.

A.3. Project Lifecycle and Financial Management

- Functionalities to add and manage project details, geographic information, NGO partner profiles, fund requests, and grant tracking.
- Budget allocation module for managing annual budgets, financial year-wise allocations, and fund disbursements.
- Features for monitoring budget utilisation across categories and tracking outcome-based KPIs, tasks, targets, and achievements.

A.4. Document and File Management

- Development of a centralized document repository for uploading and managing multiple file types, including relevant images and geo-tagged photos.
- Integration of advanced file management, including search, discussion threads, chat, and comments on documents.

A.5. Monitoring, Compliance, and Workflow Automation

- Workflow management system with configurable approvals, escalations, and event-driven notifications.
- Role-based access control for users at different levels.
- Monitoring module to ensure compliance with Terms & Conditions outlined in Grant Letters.
- Login history and audit trail mechanisms to track user actions.
- Functionality for data updates and deletions based on access privileges.

A.6. Analytics, Reporting, and Smart Search

- Development of data analytics and visualization dashboards for insights, trend analysis, and historical comparisons.
- Integration of decision-support tools for data-driven performance monitoring.
- Smart data collation based on keywords, parameters, geography, SDGs, and beneficiary categories.
- Implementation of advanced search capabilities for easy retrieval of records.
- Easy data exports in PDF, Excel, and Word formats for reporting purposes.

A.7. GIS and Location Mapping

- Integration with census data to accurately map project locations (State, District, Village).
- Functionality to upload geo-tagged photographs for real-time monitoring and field verification.

A.8. Notifications, Grievance Redressal, and User Support

- Automated email notifications for updates, reminders, approvals, and rejections.
- Efficient handling of user issues and grievances with tracking and resolution within a defined Turnaround Time (TAT).

A.9. Future-Readiness

- Provision to integrate additional modules and functionalities in alignment with evolving project and programmatic needs.

B. CSR-PMS Modules (Broad Requirements)

S. No.	Module Name	Minimal Functional Requirement Specifications
1	Infrastructure setup	Provisioning of required development, pre-production & production environment through on-prem/cloud-based infrastructure
		Installation of required applications

S. No.	Module Name	Minimal Functional Requirement Specifications
		Deployment of the application on provisioned infrastructure
		System & configuration checks
2	User Registration	Should have functionality to take personal details such as name, designation, phone number, email, image etc.
		Should have functionality to create unique user account with username and password.
3	User Management	Should have functionality to assign/remove projects to the user
		Should have functionality to assign the privileges to the user.
		Should have functionality to add/edit/delete the user profile.
4	Project Creation Post-Sanction	Should have functionality to capture the essential project data, including project name, budget, start and completion dates, implementation type (Direct/Indirect with partner details), outcomes, and geographic coordinates.
		Alignment with Focus Areas, Schedule VII Categories, and Sustainable Development Goals (SDGs).
5	CSR Project Management and Monitoring	Should have functionality to monitor the project progress based on the predefined key performance indicators (KPIs) and performance benchmarks.
		Should have the functionality to upload data from monitoring visit conducted by program team through an app. Features should include beneficiary feedback, GPS enabled pictures, voice memos, videos etc.
6	Financial Management	Should have functionality to add total budget and disbursement schedule of the finances
		Should have functionality to monitor financial progress as committed, disbursed, and utilized funds
		Should have functionality to allocate finances across financial years (FYs), cost centres and unspent CSR accounts
7	Document Management System (DMS)	Should have functionality to store and retrieve project-related reports, images and videos
		Should have functionality to securely store the utilisation certificates and other supporting documents
8	Geographical Mapping	Should have functionality to integrate the census data to record project location (state, district, village)
9	Request Evaluation	Should have functionality to collate requests for partnership (concept notes) received from NGOs and auto assign based on the thematic area
		Should facilitate review of concept notes on pre decided parameters
		Should have functionality to filter out in eligible partners based on due diligence documents, pre decided parameters etc.
		Should have functionality to present to the committee a summary and recommendation of such requests, record decision and enable sharing of proposal forms with shortlisted partners.

S. No.	Module Name	Minimal Functional Requirement Specifications
10	Proposal Evaluation	<p>Should have functionality to allow NGOs/partners to fill proposal forms, budget sheets, etc.</p> <p>Should have functionality to track progress in terms of % completion of proposal forms, analyse which section is taking more time, allow feedback/queries from SBIF team and resolution of queries etc.</p> <p>Should have functionality to rate each section of the proposals based on internal SOPs of SBIF.</p> <p>Should have functionality to present to the committee a summary and recommendation of such proposals, record decision and enable sharing of grant letter with selected partners.</p>
11	Request For Proposals (RFP) Management	<p>Should facilitate review of concept notes on pre decided parameters</p> <p>Should have functionality to filter out in eligible partners based on due diligence documents, pre decided parameters etc.</p> <p>Should have functionality to present to the committee a summary and recommendation of such requests, record decision and enable sharing of proposal forms with shortlisted partners.</p> <p>Bid Evaluation and Selection: Supports assessment of proposals based on predefined criteria.</p>
11	NGO Onboarding	<p>Should capture key partner details to ensure compliance and seamless integration.</p> <ul style="list-style-type: none"> Organizational Profile: Includes Name, Registered Address, Year of Establishment. Single Point of Contact (SPOC) Details: Name, Contact Number, Email, Designation. Document Repository for Due Diligence: <ul style="list-style-type: none"> Compliance Documents Financial Documents Operational Documents Organizational Documents Bank Account Details: Captures banking information for financial transactions. NGO feedback history from Program Teams
12	SBI Foundation Company Details	<p>Should provide an overview of CSR financial planning and compliance</p> <ul style="list-style-type: none"> Management of CSR budget allocations, disbursement, across financial years. Tracking of unspent CSR accounts and cost centers. Secure storage of key CSR policy documents, annual action plans, and compliance reports.
13	Report Generation	<p>Should have functionality to generate reports on defined periodicity</p> <p>Should have option to generate the customized reports:</p> <ul style="list-style-type: none"> Project reports, impact assessments, CSR compliance reports Management of Donor wise project funding details and status on utilisation Report generation for each donor in the prescribed format for compliance requirements such as filling on MCA portal,

S. No.	Module Name	Minimal Functional Requirement Specifications
		Brief summary of Activities, highlights for Annual Report using AI etc.
14	Dashboard & Data Visualization	Should have functionality to show the KPIs in the form of Pie Chart, Bar graph, time series analysis, Gantt chart etc.
		Should have functionality to generate actionable insights based on the data available in the system.
		Should have functionality to display the financial overviews, including committed, disbursed, and utilized amounts across projects, financial years, unspent CSR accounts, and geographic locations.
		Should have the functionality to show the status tracking of project implementation (on-track, delayed, or completed) with achievement vs. target comparisons.
15	Alerts & Notifications	Should have functionality to notify all project users if any updation is done in the project.
		Should have functionality to alert the project admin if any change is requested by the user.
		Should have functionality to send reminders to users in case of missing deadlines, delays in receiving reports, pending field visits, review meetings, disbursement etc.
		Should have functionality to display team wise, vertical wise pending activities, project status as ongoing, WIP, on-track, delayed etc.
16	Any other requirements	Should have functionality to add any other feature / functionality as per the need.

C. Plan of activities

C.1. Prepare a Project Plan as per Section B of Scope of Work and its Timeline. The agency will develop a comprehensive project plan that includes the following components:

- Project Organization and Management Plan
- Design and Development plan
- Pre-commissioning, Operational and User Acceptance Testing Plan
- Delivery and Installation Plan
- Training Plan
- Risk Management Plan
- Operations and management plan
- Task, Time, and Resource Schedules
- Technical Support Plan
- Testing Plan

C.2. AS IS Study & SRS Finalization

The agency will conduct an AS-IS process study to understand the current workflow. This phase will include:

- Reviewing all department activities and mapping tasks according to SBI Foundation's requirements.
- Map the approval, reminder, and escalation matrix along with the responsible personnel.
- Capture the detailed list of KPIs, including details such as priority, visualization type, frequency, and data source etc.
- A System Requirements Specification (SRS) document will be created, and approval will be taken from SBI Foundation.

C.3. Prototype Preparation of CSR-PMS

The agency will create a prototype of the CSR-PMS. Upon approval from SBI Foundation stakeholders, the agency will proceed with the following phases.

C.4. Development and Implementation

The agency will customize, develop, configure, and implement the CSR-PMS for SBI Foundation, which will retain exclusive ownership of all source code and business data. Requirements may be added, removed, or modified before the final SRS sign-off.

All customizations should be compatible with future updates, and the systems must meet requirements for security, performance, usability, and administration.

C.5. Carry Out Testing (Functional Testing, Integration Testing and UAT)

Once the functional requirements are approved and design is started, the Agency shall prepare all necessary Test Plans (including test cases), i.e., plans for Acceptance Testing. Test cases for User Acceptance Testing shall be developed. The Agency shall submit the test plans and test result reports for comprehensive verification and approval.

A high-level analysis of testing requirements has been given below;

- The Agency shall review the detailed testing requirements and may suggest detailed testing requirements
- The testing should be comprehensive and should be done at each stage of development and implementation.
- The Agency shall design the testing strategy, test cases and conduct testing of various components of the system for the Project.
- The Agency shall perform software testing including unit testing, system testing, integration testing and performance etc.
- The Agency shall, after development and customization/configuration of the system, conduct tests to demonstrate that the system meets all the functional requirements and designs as approved.
- The Agency is required to carry out testing and user acceptance test before the system is made live for departmental users. The parameters for carrying out testing are listed below:
 - Functional testing
 - Usability testing - Test for navigation, Content checking

- Compatibility testing - Browser testing, Printing options
 - Performance testing
 - Security testing
 - User experience
- The Agency is required to perform test cases, rectify errors, bugs and incorporate changes suggested during the testing phase.
 - Post internal testing, the Agency shall submit the product for the testing for User Acceptance testing.
 - The Agency shall fix the issues identified during User Acceptance Testing and obtain UAT sign-off.

C.6. Create Training Plan and Provide Training to Users

- The agency will provide training for users and administrators, including functional and technical training for business and IT staff on database and application use. Training will be conducted at SBI Foundation premises for internal staff of 85+ employees and online for 300+ NGO partners in batches, with the agency responsible for setting up the test environment. If the training does not meet SBI Foundation's expectations, additional sessions will have to be offered at no extra cost.
- The test environment required for the training must be set up by the Agency before the training commences. However, the Systems (Desktop Computers or Laptops) for UAT shall be arranged by SBI Foundation.
- The agency will also provide online training for associated NGOs, with a dedicated point of contact assigned to facilitate these sessions and answer any queries.

C.7. Prepare User Manual Documents for CSR PMS

The Agency shall provide the user manuals capturing all the functionality of CSR-PMS after mutual discussion and finalization.

C.8. Manage Go-Live Event

- The Agency shall provide a detailed list of specific activities for go live events.
- The project plan submitted by the Agency must ensure that the activities are completed before the event. The go-live event will be dependent on the successful UAT sign-off.

Go-live shall be deemed successful only upon completion of the following:

- All modules functionally tested and approved
- No critical issues pending
- User training conducted successfully
- Written UAT sign-off obtained from SBI Foundation

C.9. Other Terms & Conditions

i. Change Adaptability:

- The agency will support SBI Foundation in implementing new or modified processes, including change management to ensure user adoption of the CSR-PMS.

ii. Data Encryption:

- Confidential information (e.g., Executive ID, email, compliance data, etc.) must be stored in encrypted form, with the ability for SBI Foundation to retrieve it both in encrypted form and as plain text.

C.10. Annual Support to Management Information System

The agency will provide real-time support services for the CSR-PMS for the Contract Period, starting from 2 months after the “Go-Live” date. The Annual Maintenance Contract (AMC) may be extended annually based on satisfactory performance, at the sole discretion of SBI Foundation. However, SBI Foundation may terminate the AMC at the start of any renewal year with a 30-day notice.

Upon termination or completion of the contract, the agency will hand over all necessary technical knowledge, including source code, business data, and technical and functional documents. SBI Foundation may also call the agency on an as-needed basis.

All data, source code, system configurations, and documentation shall remain the sole property of SBI Foundation. The agency must provide regular backups in open formats (SQL, CSV, etc.) and submit complete source code and documentation upon go-live and contract closure. A 30-day support period post-termination must be provided to ensure smooth transition.

Annual Support Services

The agency will provide the following support services as part of the annual support:

1. Patch upgrades
2. New feature rollouts (for Commercial Off-The-Shelf (COTS) products)
3. Product configuration support, both onsite and remote, to resolve issues and defects
4. Support and changes in product/KPI configuration
5. Periodic data backup and restoration, as agreed in the SRS document
6. User training for all stakeholders, including new users
7. Remedial support for SBI Foundation end-users on CSR-PMS, including:
 - API integration errors
 - Data errors and report layout adjustments
 - Access issues for end-users
 - Changes in KPI names, visualization, and frequency
8. Updates to the user manual and SRS document with proper version control
9. Cloud hosting support
- 10. Minor changes requiring up to 2 man-days of effort (mutually agreed)**

Change Request Management

The agency will manage additional tasks ("Change Requests") that arise during the contract period. These tasks include those requiring more than 1 man-day, as mutually determined by SBI Foundation and the agency.

Change Requests shall refer only to significant enhancements outside the scope of the approved System Requirements Specification (SRS). All requirements captured and signed off in the SRS must be implemented without additional cost. Minor updates, bug fixes, or changes to labels, dashboards, or configurations within the agreed scope shall not be treated as chargeable change requests.

Basic functionalities of Change Requests include:

- Functional changes in the application
- Development of new modules, forms, or reports in the existing software
- Modifications to the core application framework
- Integration with new systems
- Addition of new KPIs
- Enhancements to reports and dashboards
- User training for new locations
- Additional cloud services (e.g., storage and RAM expansion)

The Change Request Management will also cover expanding the CSR-PMS to new locations, departments, or digital platforms.

6. Selection Criteria for Agencies

Evaluation of proposals of Agency

The Committee constituted for this purpose shall evaluate the capabilities of the potential agencies/ based on their profile and the criteria mentioned below. Agencies not complying with any of the eligibility criteria are liable to be rejected and will not be considered for further evaluation. Agencies must submit proof of all the credentials as required for evaluation of eligibility criteria. Claims of the agency/agencies without verifiable facts won't be considered as credentials towards satisfying eligibility criteria. SBI Foundation may seek specific clarifications from any or all the agencies at this stage. All the clarifications received within the stipulated time shall be considered for evaluation. In case satisfactory clarifications are not received from the bidders within the stipulated time, the respective parameters would be treated as non-compliant, and the decision to qualify the bidder shall be accordingly taken by SBI Foundation.

Proposals received for empanelment will be evaluated on the parameters mentioned below.

Sl. No.	Evaluation Criteria	Scores
1	Availability of the mandatory documents of the organization (registration certificate, registered address, tax related documents, data protection policies, copies of relevant ISO and/or CMMI certificates, etc.)	Yes/No (eligibility criteria)
2	Number of <u>Corporate/Corporate Foundation/Govt.</u> Clients in the last 5 Years (0 to 10 marks) - in one or combination of the following areas: 1. <i>Management Information System (MIS)</i> 2. <i>Activity Entry and Tracking System</i> 3. <i>Project Monitoring System</i> 4. <i>Business Intelligence Platform</i> 5. <i>Business Analytics Dashboard</i> 6. <i>Decision Support System (DSS)</i>	20
3	Experience in implementing technology solutions for Social Sector/CSR programs (0 to 10 marks) - in one or combination of the following areas: 1. <i>Management Information System (MIS)</i> 2. <i>Activity Entry and Tracking System</i> 3. <i>Project Monitoring System</i> 4. <i>Business Intelligence Platform</i> 5. <i>Business Analytics Dashboard</i>	20

	6. <i>Decision Support System (DSS)</i>	
4	Work Schedule for CSR PMS creation and data migration <i>Preference will be given to the agency who will complete the assessment process in a shorter period. In case of tie in score, agencies submitting shorter duration of work schedule will be considered.</i>	20

Note: *The above marks will be considered for the shortlisting of the agencies. All the agencies will be shortlisted based on scrutiny and technical evaluation by the screening committee.*

- a. Submission of EOI along with technical proposal by Eligible Agencies.
- b. Qualifying Agencies will be Shortlisted based on the Technical Evaluation by the Internal Committee of SBI Foundation.
- c. **Shortlisted agencies will be asked to give a presentation covering technical aspects like Existing or past work samples, Technical Clarity, Expertise in Understanding CSR Issues, Operational Support, Risk Management & Reporting Plan, etc.**

7. Guidelines for Technical Proposal

1. The technical proposal should contain a detailed description of how the agency will cover the study requirements outlined in this RFP.
2. Proposals must be direct, concise, and complete. All information not directly relevant to this RFP should be omitted. SBIF will evaluate the agency's proposal based on its clarity and the directness of its response to the requirements of the program.
3. The agency/organization must submit all the Annexures, duly attached with this RFP, and the documents mentioned in Clause No. 4.8 along with the technical proposal.
4. Technical Proposal to be submitted will have the following:

7.4.1	Letter of Proposal Submission
7.4.2	Organizations Detail
7.4.3	Experience of the Agency (Number of Corporate/Corporate Foundation/ PSU Clients in the Last 5 Years)
7.4.4	Experience in Implementing Technology Solutions for CSR Clients
7.4.5	Work Schedule

TECHNICAL FORM: 7.4.1

LETTER OF PROPOSAL SUBMISSION

(To be printed on your company's letterhead)

{Location, Date}

To,

Managing Director
SBI Foundation
35, Arcade, World Trade Centre,
Mumbai. Maharashtra. Pin – 400021

Dear Sir,

We, the undersigned, offer to provide the assignment/job to **Design, Develop, Implement and Maintain (3 years) a CSR Project Management Software (CSR- PMS)**, in accordance with your Request for Proposal No..... Dated....., We are hereby submitting our Proposal, which includes this Technical Proposal sealed under a separate envelope.

1. We hereby declare that all the information and statements made in this proposal are true and accept that any misinterpretation contained in it may lead to our disqualification.
2. We further undertake that our agency has its own establishment containing sufficient logistics and infrastructure.
3. We understand you are not bound to accept any Proposal you receive.

Yours sincerely,

Signature

Name and Title of Signatory [In full and initials]:

Name of Firm:

Address:

7.4.2: ORGANIZATIONS DETAIL

(Provide here a brief description of the background of your organization, the brief description should include ownership details, date and place of incorporation of the firm, objectives of the firm, etc. Also, if the consultant has formed a consortium, details of each of the member of the consortium, name of lead members, etc. shall be provided)

Name of the Firm	
Address	
Website	
Name of Contact Person	
Address of Contact person	
Telephone/ Mob No.	
Email ID	
Date/Year and place of inception of firm	
Objective of the firm	
Whether a consortium formed by a consultant	
Details of Member Consortium	
Name of lead members of the consortium	

7.4.3. EXPERIENCE OF THE AGENCY (NUMBER OF CORPORATE/CORPORATE FOUNDATION/PSU CLIENTS IN THE LAST 5 YEARS)

Sr. No.	Name and address of the client with contact numbers	Type of Organization	Location of the Work	Value of work executed (in Rs.)	Date of award of contract	Period of Contract		Description of the project Details of feedback / appreciation letters (attach proof)
	Government/ Corporate/ Corporate Foundation/ PSU					From	To	

Total Number of Corporate/Corporate Foundation/ PSU Clients:

Note:

1. *Applicable 5 years shall be preceding five financial years excluding the financial year of floating of the RFP (i.e., FY 2023-24, FY 2022-23, FY 2021-22, FY 2020-21, FY 2019-20)*
2. *Please enclose the copies of the relevant contracts and Work Orders containing the scope of services, the value of the contract or Work Order and completion certificate from clients, regarding successful completion of the services.*

7.4.4. EXPERIENCE IN IMPLEMENTING TECHNOLOGY SOLUTIONS FOR CSR CLIENTS

Sr. No.	Name and address of the client with contact numbers	Type of Organization	Location of the Work	Value of work executed (in Rs.)	Date of award of contract	Period of Contract		Details of feedback /appreciation letters (Attach proof)
						From	To	

Total Number of CSR Clients:

Note:

1. *Applicable 5 years shall be preceding five financial years excluding the financial year of floating of the RFP (i.e., FY 2023-24, FY 2022-23, FY 2021-22, FY 2020-21, FY 2019-20)*
2. *Please enclose the copies of the relevant contracts and Work Orders containing the scope of services, the value of the contract or Work Order and completion certificate from clients, regarding successful completion of the services.*

7.4.5. WORK SCHEDULE

Sr. No.	Milestone	Time for Completion (in Weeks)
1	Project Start	T= Date to Agreement
2	Preparation of System Requirement Specification Document (Study of the AS IS Process and Requirement Gathering)	T+
3	SRS Finalization and Sign-off	T+
4	Prototype Preparation and Sign-off	T+
5	Digital Program Management Dashboard Development/ Customization	T+
6	Unit, Functional and Integration Testing	T+
7	Training to SBI Staff Members (phase wise: Online & Offline Mode)	T+
8	Submission of customized User Manual- Step by Step guide	T+
9	Go-Live	T+

ANNEXURES

Documents to be submitted

1. Technical Proposal Format:

- a. Letter of Proposal Submission
- b. Organizations Detail
- c. Experience of the Agency (Number of Corporate/Corporate Foundation/ PSU Clients in the Last 5 Years)
- d. Experience in implementing technology solutions for Social Sector/CSR programs
- e. Agency Expertise (Manpower)
- f. Work Schedule

2. Financial Proposal (password protected file)

3. For Agency Profile:

- a. **Company (Private or Public):** Certificate of Incorporation, Memorandum of Association, Articles of Association
 - b. **Registered partnership firm:** Registration certificate, Deed of Partnership
 - c. **LLP firm:** Certificate of Incorporation, Deed of Partnership
4. PAN, TAN, GST Certificate, ITR for FY 2022-23, 2023-24.
5. Last Three Years Annual Audited Financial Statements, (Profit & Loss account and Balance Sheet duly audited/certified by CA) and certificate/ Audit Reports.
6. **Data Protection Policies** (*including Data Retention Policy, Backup Policy, Disaster Recovery Plan, Data Encryption Protocols, Access Control Measures*), **Vulnerability Assessment and Penetration Testing (VAPT)** Reports, copies of relevant **ISO certificates** (*ISO 9001 for Quality Management and ISO 27001 for Information Security Management*) and/or **CMMI certificates**, etc.
7. Annexure II
8. Annexure III
9. Annexure IV

Note: Failure to furnish all the mandatory documents will result in rejection/ Disqualification of the agency.

Annexure II**FORMAT OF FINANCIAL INFORMATION (TURNOVER/PROFIT & LOSS, ETC.) DURING THE LAST THREE YEARS)**

S. No.	Financial Year	Annual Turnover (in Rs. Crore)	Profit / Loss (in Rs. Crore)	Net Worth (in Rs. Crore)	Documents Enclosed as Proof
1	2021-22				
2	2022-23				
3	2023-24				
4.	2024-25				

Note: please enclose a copy of Profit & Loss account and Balance Sheet duly audited/certified by CA.

Annexure III

Date_____

Self-Declaration of Non-Discrimination
TO WHOMSOEVER IT MAY CONCERN

We, _____, hereby declare that we do not discriminate based on race, color, religion, sex, national origin, age, sexual orientation, gender identity, disability, genetic information, citizenship, veteran status, marital status, or any other basis prohibited by law.

Authorized Signature [In full and initials]:

Name and Title of Signatory:

Name of Firm and Address:

Declaration of non-blacklisting

(On letterhead of the Agency duly stamped and signed)

Date: _____

DECLARATION-CUM-CERTIFICATE

TO WHOMSOEVER IT MAY CONCERN

This is to certify that our agency, (Name of Agency) has/have not been blacklisted/banned/barred/disqualified/prohibited by Government of India or State Government, Public Sector Undertaking (PSU), any regulatory/Statutory authority or any court of law.

We understand that any incorrect information or misrepresentation may lead to the rejection of our engagement with SBI Foundation.

Authorized Signature:

Name and Title of Signatory:

Name of Firm and Address: