RFP-2025-18
ANNEXURE 1 – TECHNICAL PROPOSAL

CONSULTANT/FIRM: _____

SECTION A: TECHNICAL EVALUATION

1. **Please describe your technical understanding of this assignment.** *Clearly outline your grasp of the project's objectives, scope, and expected outcomes. (Maximum 150 words)*

2. **Why do you think you/your institution is best qualified to undertake this assignment?** *Outline your relevant experience in relation to this assignment. (Maximum 300 words)*

3. Please describe your approach and execution plan for this consulting engagement to ensure a robust and quality output.

   a. Describe the approach to be implemented by your firm in each one of the key steps of this project (sampling design, piloting and training, fieldwork and oversight, data cleaning, analysis and reporting) and the reason this will ensure   robust and quality output. *(Maximum 150 words)*

   b. Provide a detailed workplan including the key activities, timelines and team efforts to implement this project and the factors that will allow your firm to be successful. *(Maximum 150 words)*

4. What are the risk and challenges would you anticipate for this assignment and how do you propose to mitigate them? *Identify key risks and present a mitigation strategy. (Maximum 100 words)*

5. **How do you intend to monitor and evaluate the progress and effectiveness of your implementation of this assignment?** *(Maximum 150 words)*

6. Experience in Key Thematic Areas

Please indicate your level of experience in the following areas by selecting the appropriate option:

No.	Area of Expertise	Extensive Experience	Moderate Experience	Limited Experience
1.	Financial Regulation & Policy	☐	☐	☐
2.	National Financial Inclusion Strategies & Policy	☐	☐	☐
3.	National Financial Inclusion Surveys	☐	☐	☐
4.	Equitable financial inclusion by gender and other underserved groups	☐	☐	☐
5.	Sustainable finance, resilience and green finance	☐	☐	☐
6.	Sampling and weighting methodologies	☐	☐	☐
7.	Demand-side survey instrument design and piloting	☐	☐	☐
8.	Demand-side surveys quality data collection	☐	☐	☐
9.	Statistical Analysis and reporting	☐	☐	☐

7. **Please give a brief description of previous work most related to the assignment and country/region as details in the RFP/TOR demonstrating your experience based on above?** *With references where possible (Maximum 600 words)*

8. **List three (3) references (clients, institutions, or partners) for whom you have undertaken similar assignments.** *Provide their names, institutions, email addresses, and phone numbers.*

9. **Provide details of the key personnel who will be involved in this consultancy.** *Include their **roles, qualifications, and experience in similar assignments**. Attach detailed CVs. (Maximum 300 words)*

10. **The following documents must be submitted as part of your application.**
   [Disclaimer: AFI has the right to disqualify applicant who do not comply to the submission requirements]

   (i) *Updated CVs of proposed consultant(s) demonstrating evidence of the required skills and experience listed in the TOR.* ☐*Attached*

   (ii) *Previous work samples of similar work done (link or attachment).* ☐*Attached*

   (iii) *Work Plan.* ☐*Attached*

   (iv) *Conflict of Interest Disclosure Form* ☐*Attached*

   (v) *Statement of Integrity [when applicable]* ☐*Attached*

   (vi) *Business Registration. [FOR SOLE PROPRIETOR, COMPANY, FIRM or ORGANIZATION]* ☐*Attached*

   (vii) *Joint Venture Agreement.* ☐*Attached*

11. **Any additional information that would help in evaluating your qualifications and suitability for this project?** *(Maximum 200 words)*