



Request for Proposal (RFP)

Funding projects for SBIF – Garima (Elderly Care)

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www.sbifoundation.in

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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 the society. The focus areas of SBIF are Rural Development, Healthcare, Women Empowerment, Child Development, 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 section and enable them to live up to the potential that they all possess.

SBI Foundation's flagship "**SBIF Garima**" – Caring for India's Elders with Dignity, is envisioned to holistically address the vulnerabilities faced by the ageing population. The flagship is conceptualized towards achieving UN **SDG 3** (Good Health & Well-being), **SDG 10** (Reduced Inequalities), **SDG 11** (Sustainable Cities & Communities), and **SDG 17** (Partnerships for the Goals). It aligns closely with the UN Decade of Healthy Ageing (2021–2030) and the WHO Integrated Care for Older People (ICOPE) framework to safeguard intrinsic capacity, functional ability, and the dignity of senior citizens.

Through this mission, our interventions are designed to reach the elderly in marginalized, rural, tribal, and underserved communities, who remain excluded from quality geriatric care. It envisages a programme that creates **a continuum of care for older persons** through Centres of Excellence in Geriatric Care, Geriatric Rehabilitation & Outreach-on-Wheels (GROW), District Geriatric Enhancement Units (DGEUs), and Fortification of Day-Care Centres, Old-Age Homes and CHCs/PHCs. The programme integrates infrastructure upgradation, geriatric workforce training, and family caregiver support, ensuring that ageing is experienced with dignity, security, and social inclusion.

About the Request for Proposal (RFP)

SBIF intends to engage non-profit organizations registered in India for funding projects in the thematic area of **Elderly Care**. This RFP is **exclusive to the retrofitting & fortification of Old-Age Homes**. Through this, SBIF envisages interventions that transform Old-Age Homes into elder-friendly, safe, and dignified living spaces through retrofitting, infrastructural fortification, and service augmentation. The programme also integrates age-sensitive design, universal accessibility, medical and psychosocial support systems, and community participation, thereby ensuring ageing with dignity, safety, and respect. Projects must embed community participation, align with national health policies (NPHCE, AB-HWC, PM-JAY), and incorporate WHO ICOPE standards for elderly health.

The purpose of this Request for Proposal (RFP) is to invite potential grantees with a proven track record in geriatric care homes to implement projects in the aforementioned thematic areas during the financial year 2025-26 & 2026-27. This document provides information to enable the agencies to understand SBIF's requirements and submit proposals accordingly.

Invitation for Proposals

SBI Foundation hereby invites proposals from NGOs/NPOs for implementing projects under **SBIF Garima – Retrofitting & Fortification of Old-Age Homes**. The budget for a proposal should be as per mentioned in the Framework (Page 11 onwards) for a support period of **1 to 2 years**. **Multiple submissions will be disqualified.**

For project proposals below ₹1.00 Cr., the **cumulative revenue** of the organization for the last 3 financial years (2021-22, 2022-23, 2023- 24, {2024-25, subject to availability}), should be a minimum of ₹2.00 Cr.

And

For project proposals above ₹1.00 Cr, the **cumulative revenue** of the organization for the last 3 financial years (2021-22, 2022-23, 2023- 24, {2024-25, subject to availability}), should be a minimum of ₹5.00 Cr.

The RFP Document, Proposal Forms, Document Checklist, Grant Utilization Format, Quarterly Reporting Format is 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 & Dates

SN	Process step	Timeline/Details
1	Publication date of the RFP	8 th October 2025
2	Last Date for requesting clarifications through email	20 th October 2025
3	Last Date and Time for submission of proposals	31 st October 2025
4	Communication to shortlisted NGOs to make presentations	11 th – 15 th November 2025
5	Tentative dates for Presentations to be made by shortlisted NGOs	23 rd – 30 th November 2025
6	Final communication of selection	After 1 st December 2025
7	Place of Submission of Proposals (Online Submission only)	<p>jivanamrfp@sbifoundation.co.in</p> <p>Soft copies to be sent by 31st October 2025 with the Subject Line (all caps): “SBIF GARIMA RFP (ORGANISATION 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, 35, Arcade, World Trade Centre, Cuffe Parade, Mumbai – 400005.</p>

Instructions to the Agencies

1. Submission of Proposal

- a. An agency can only submit one proposal at a time.
- b. The agency should have a presence in the locations that they are submitting the proposals for. For example - If the proposed location is Punjab, only NGOs having a presence in Punjab will be eligible for submitting the proposal.
- c. The agency should submit the proposal only if it meets all the criteria mentioned in this RFP. No deviations are allowed.
- d. No reference is entertained; it might 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 by the mode of email to jivanamrfp@sbifoundation.co.in by **31st October 2025**.
Note: The Shortlisted NGOs as communicated by SBI Foundation will be required to send hard copies of proposals along with the required documents to SBI Foundation's office address. (SBI Foundation, 35, Arcade, World Trade Centre, Cuffe Parade, Mumbai – 400005).
- 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 jivanamrfp@sbifoundation.co.in with a subject SBIF Garima - RFP, **20th October 2025** (due date for submission of queries/clarifications as mentioned in the Key Events and Dates). Queries received after the aforesaid due date will not be responded/acted upon.
- b. Queries on telephone, Social Media or any other medium shall **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

Proposals should be submitted in English language only.

6. Documents (Soft Copies) to be submitted and Pre-qualification criteria

- a. The Agency should be The agency should be a non-profit organisation such as a Registered Trust, Registered Society, Section 8 company, or any entity established under an Act of Parliament or a State Legislature registered in India.

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

The agency must also submit the following documents with the proposal in addition to all documents as mentioned in the document checklist (Annexure II):

- b. Performance Track record: In accordance with the regulations of SBI Foundation, the agency must monitor the project's progress and submit monthly and quarterly reports to ensure effective end-to-end management and to maintain a comprehensive performance record. Thus, the organisation must have a **minimum of three years of experience** in operating, managing, and administration of residential care facilities (old age homes) and institutional support centres for the elderly.
- c. 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.
- 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.
- e. Any Sub-letting, sub-contracting and/or outsourcing of the activities shall not be allowed.
Documents to be submitted: Copies of previous project completion reports, third party assessments, work experience details, and audited documents for verification of Agency's claim of experience.
- f. A Copy of the RFP shall be submitted with authorized signature and official seal on each and every page of the RFP by the agency.

7. Evaluation Process:

- a. SBI Foundation will shortlist the proposals based on the Shortlisting criteria as mentioned on Page No. 13 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 in Page No. 13 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 basis on satisfactory performance by the agency and submission of quarterly reports (activity and financial utilization) duly signed by the authorized signatory and duly certified by the auditors of the successful agency. Brief monthly updates on activities conducted would also be required to be submitted.
- b. All terms regarding the grant will be in accordance with the amendment to the Companies Act 2013, with effect from 22nd January 2021, 7th July 2025 and any further enactments by the government shall be binding on all the stakeholders.
- 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 30th 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

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 the Ministry of Corporate Affairs for further course of action.

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.

13. SBIF's right to terminate the process

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 proposals shall be declared late and will be rejected at the discretion of SBIF.

16. Disclaimer

- a. 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.
- b. This RFP is not an offer by SBI Foundation, but an invitation to receive responses from the eligible implementing agencies.
- c. 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.
- d. 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.
- e. 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 for 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.
- f. 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.
- g. 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 proposals without assigning any reason whatsoever.

- h. 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

- 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 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 (70%) and Financial Proposal (30%). The full marks will be 100.

Scope of Work

The proposed projects under **SBIF – Garima** should focus exclusively on retrofitting and fortification of Old-Age Homes and must broadly follow the framework below.

Thematic area: **Elderly Care**

Interventions under which proposals are invited: **Retrofitting and Fortification of Old-Age Homes.**

Framework of SBIF Garima – Retrofitting & Fortification of Old-Age Homes

Partner organizations applying for a project in the above-mentioned thematic area must follow the broad framework for SBIF – Garima for the following intervention:

Project Location: Priority states include Uttar Pradesh, Bihar, Odisha, Gujarat, and Punjab.

Project Budget: ₹0.50 – ₹2 Crore (indicative).

Target Demography:

- Urban Areas: Older persons residing in NGO-managed Old-Age Homes in cities where the elderly face social exclusion and lack of access to quality care.
- Rural & Tribal Areas: Senior citizens living in Old-Age Homes located in underserved districts where healthcare, rehabilitation, and geriatric services are inaccessible or inadequate.

Project Duration: 1 to 2 years.

Activities to be undertaken:

1. Baseline Facility Audit & Elder Rights Assessment

- a. Conduct an infrastructure and service audit using checklists from NPHCE, WHO ICOPE, and MoHFW's "Minimum Standards of Old Age Homes."
- b. Collect ICOPE baseline data (mobility, cognition, nutrition, sensory, psychological health) of all residents.
- c. Include a "Elder Safety & Rights" assessment of the chosen region, covering risks of neglect, financial exploitation, and abuse.
- d. Map local support structures (legal aid, police units, helplines).

2. Structural Retrofitting for Age- & Disability-Friendly Design

- a. Use Tactile Tiles, Rubber Floor Tiles, Anti-Slip Rolls, etc. in the facility. Align with Harmonised Guidelines for Universal Accessibility (MoHUA, 2021), including the installation of ramps with handrails, grab bars in critical areas, and obstruction-free pathways for safe mobility.
- b. Ensure basic safety through adequate, glare-free lighting, marked fire exits, emergency alarms, panic buttons in rooms, and CCTV in common areas—adhering to National Building Code (NBC) 2016 standards for residential care facilities.

3. Health & Clinical Care Integration

- a. Dedicate a privacy-compliant space for a Medical Care Unit with geriatric beds, basic diagnostic equipment, and first-aid kits.
- b. Monthly health camps for NCD screening, mental health, vision, and hearing.
- c. Integrate with PHCs/CHCs under NPHCE for referral and emergency care.
- d. Introduce ICOPE-based assessments for every resident, updated quarterly.

4. Nutrition & Diet Services

- a. Kitchens and dining halls to ensure hygiene and safety. Establish kitchen gardens and partnerships with SHGs/FPOs for fresh produce, wherever applicable.

- b. Develop diet plans tailored to chronic illnesses (diabetes, hypertension, renal conditions, etc.).

5. Psychosocial Support & Dementia-Friendly Adaptation

- a. Create dedicated recreation/activity rooms and therapeutic green spaces.
- b. Weekly peer-support groups & counselling sessions for depression, grief, and anxiety.
- c. Daily memory-stimulation and light physical activity sessions for cognitive health.

6. Capacity Building of Caregivers & Staff

- a. Mandatory training on ICOPE competencies, dementia care, palliative care, and elder-sensitive communication.
- b. Specialized training modules on identifying and responding to elder abuse.
- c. Certification of staff in basic geriatric nursing, emergency care, and safeguarding procedures.

7. Digital Enablement & Monitoring Systems

- a. Introduce EMR/EHR linked to ABHA IDs for all residents.
- b. Set up digital dashboards tracking occupancy, health data, caregiver ratios, and incident reports.
- c. Enable teleconsultations via e-Sanjeevani.
- d. Provide residents with supervised access to digital devices for family communication.

8. Elder Abuse Prevention & Safeguarding Framework

- a. Establish a zero-tolerance elder abuse policy and display it prominently.
- b. Create confidential reporting mechanisms (complaint boxes, helpline numbers, whistleblower protections).
- c. Appoint a Safeguarding Officer in each home, trained to handle complaints.
- d. Quarterly safeguarding audits with resident feedback sessions.
- e. Conduct awareness sessions for residents on their rights under the Maintenance and Welfare of Parents and Senior Citizens Act, 2007.

9. Legal Aid & Redress Mechanisms

- a. Formal linkage with District Legal Services Authority (DLSA) for free legal aid.
- b. Partner with local police senior citizen cells for emergency response.
- c. Facilitate access to helplines such as *Elderline 14567*.
- d. Legal literacy camps for residents on inheritance rights, pensions, property protection, and elder laws.

10. Community Engagement & Family Linkages

- a. Monthly open-house days with families, volunteers, and local community; family counselling to strengthen reintegration where feasible.
- b. Introduce intergenerational programmes (school/college student visits, community storytelling, skills exchange).
- c. Community outreach campaigns against ageism, neglect, and elder abuse.

11. Monitoring, Evaluation & Quality Assurance

- a. Use WHO ICOPE functional domains and MoHFW standards as core quality indicators.
- b. Conduct baseline and endline evaluations of health outcomes, safety, and satisfaction.
- c. Third-party independent audit of infrastructure and safeguarding compliance.
- d. Annual "Elder Dignity Scorecard" measuring resident well-being, safety, and rights awareness.

Selection Criteria for Agencies

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

1. Project

- a. Alignment with SBIF Garima – Retrofitting & Fortification of Old-Age Homes Framework (Page 11 onwards)
- b. Project objective & rationale
- c. Innovation in the project
- d. Risk-mitigation measures
- e. Log frame & Project timelines
- f. Project Monitoring & Evaluation Process
- g. Project exit strategy
- h. Project sustainability

2. Budget

- a. Budget Justification & Cost-effectiveness of proposed budget
- b. Budget Compliance (Final Budget shall be subject to the discretion of SBI Foundation and in-line with SBIF Garima Strategy)

3. Governing Structure

- a. The Agency should have a minimum 3 years of registration.
- b. The Agency should have a minimum of 3 years of work experience in the proposed state.
- c. The Agency should have demonstrated capability to improve measurable outcomes to ensure effectiveness and efficiency of the intervention.
- d. The Agency should have previous experience of executing projects in the interventions mentioned and applied for.
- e. Although the selection criteria for agencies is being set on above mentioned points, the selection committee of SBI Foundation will verify the due diligence documents as per the checklist provided in **Annexure II**.

4. Grounds for Rejection

An Agency shall be rejected if:

- a. The cumulative revenue of the organization for the last 3 financial years (2021-22, 2022-23, 2023- 24), {2024-25 (if available)} is less than ₹2.00 Cr when the proposed project budget is between ₹50 Lakh to ₹1.00 Cr.
- b. The cumulative revenue of the organization for the last 3 financial years (2021-22, 2022-23, 2023-24), {2024-25 (if available)} is less than of ₹5.00 Cr when the proposed project budget is above ₹1.00 Cr.
- c. It is associated with, or receives funding from, any religious entity.
- d. It is associated with, or receives funding from, any political entity
- e. Fails to submit the due diligence documents as specified in Annexure II.
- f. The number of Board Members is less than 4.
- g. The number permanent employees is less than 5.
- h. Has individual donors among its top 3 funding sources.
- i. Proposes to implement the project at a location outside India, and/or other than the locations mentioned in this RFP.

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 replicable across geographies and demographics.
5. NGOs having demonstrated the capability to improve measurable outcomes to ensure the 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.

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 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 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 the 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

Name of the authorized signatory:

Designation:

Witnesses:

1. _____
2. _____

For Service Provider

Name of the authorized signatory:

Designation:

Witnesses:

1. _____
2. _____

Annexure II

Due Diligence Document Checklist

SN	Documents
1	Technical Evaluation Form
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	Form CSR 1
8	FCRA Certificate
9	PAN
10	Address Proof
11	IT – Returns (Last 3 Years)
12	Audited Reports (Last 3 Years)
13	Self-Declaration
14	Annual Reports (Last 3 Years)
15	Organisation Profile
16	Brief Bio Data (incl. Education and Work ex) of Board Members
17	Brief Bio Data (incl. Education and Work ex) of Top Management
18	Minutes of Board Meeting (last two)
19	Personal/HR Policy: Including Remuneration policy for Directors/Trustees; Remuneration policy for CEO, COO, Secretariat etc. ; Promotion, Increment, Role assignment policy.
20	Finance Policy: Including procurement policy, Purchase/Sale of Assets/Investments.
21	Organogram of Organization
22	Detailed Budget sheet in Excel
23	Third party evaluation/Audit reports/Impact Assessment
24	MIS for planning, tracking & reviewing

25	Profile of Key leaders and Founders
26	Press reports
27	Awards and Recognitions Pics/link
28	Feedback mechanism
29	Monitoring Mechanism/Software in place
30	GST certificate

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Annexure III

Technical Form (Evaluation Form)

The Evaluation Form has 2 sections:

1. Section 1: Organisation Details
2. Section 2: Project Proposal

The proposal shall be evaluated out of 100.

Link: [SBIF Evaluation Form](#)

- Click on the link provided above.
- Click on the “Download” option on top right corner of the page.

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Annexure IV

Financial Format

Link: [SBIF Financial Format](#)

- Click on the link provided above.
- Go to “File” option on top left corner of the page > “Create a Copy” > “Download a Copy”.

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Annexure V

Format of Agreement/ MoU

MoU & Grant Letter Format Link: [SBIF Sample Grant Letter & MoU](#)

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