

Expression of Interest (EOI)

Terms of Reference (ToR)

Consultancy Services for Climate Strategy and Reporting & Monitoring Framework Development

Organization:	Shakti Foundation for Disadvantaged Women
Project:	Inclusive Climate Finance for Vulnerable Communities in Asia and Pacific (ICCAP)
Activity Reference:	Activity 1.2 - Climate Strategy and Reporting & Monitoring Framework Development
Location:	Dhaka with field visits to project districts
Duration:	6 months from contract signing
Contract Type:	Consultancy Contract (Individual or Firm)

1.0 About the Organization

Shakti Foundation for Disadvantaged Women (Shakti Foundation) is a national development organization and microfinance institution working across Bangladesh since 1992. The organization is committed to the socio-economic empowerment of disadvantaged women through social and financial inclusion. Beginning with a pilot urban microfinance program for slum-dwelling women in Dhaka, Shakti Foundation has strategically expanded its service network into rural areas and now serves more than 6 lac members through a nationwide network of 648 branches across 57 districts. Alongside microfinance, its programming spans health, climate change, financial inclusion and women's empowerment, supported by an extensive field presence and community-based delivery platforms.

Shakti is registered with the NGO Affairs Bureau of Bangladesh under the Foreign Donations (Voluntary Activities) Regulation Rules and with the Registrar of Joint Stock Companies and Firms under the Societies Registration Act 1860. It is also licensed by the Microcredit Regulatory Authority (MRA) to operate its microfinance program.

Bangladesh faces escalating climate risks, including extreme heat, flooding, cyclones, salinity intrusion, water stress, ecosystem degradation and climate-sensitive health threats. These risks affect low-income women and other vulnerable populations disproportionately and can disrupt Shakti Foundation's operations, assets, workforce, clients and service delivery. At the same time,

Shakti Foundation's reach creates opportunities to integrate climate resilience, environmental responsibility and low-carbon practices across programs and institutional systems.

Under the Inclusive Climate Finance for Vulnerable Communities in Asia Pacific (ICCAP) program, Shakti Foundation intends to engage a qualified consultant or consulting firm to develop an organization-wide Climate Strategy and a practical Monitoring & Reporting Framework. The assignment will translate climate commitments into prioritized, costed and measurable actions, with clear governance, indicators, data tools, accountability and reporting arrangements.

2.0 Project Context

The Inclusive Climate Finance for Vulnerable Communities in the Asia Pacific (ICCAP) is a five-year regional project implemented by a consortium of three partners: Appui au Développement Autonome (ADA), the Asia Pacific Rural and Agricultural Credit Association (APRACA), and the Stockholm Environment Institute (SEI). The project aims to improve and scale up access to both public and private climate finance flows through Financial Service Providers (FSPs) to vulnerable communities across the Asia-Pacific region, including Bangladesh, Bhutan, Cambodia, Fiji, Lao PDR, and Nepal. The project is financed by the International Climate Initiative (IKI) as part of the German Government's international climate finance commitment.

In Bangladesh, ADA is providing technical assistance to partner FSPs, including Shakti Foundation, to strengthen their capacity to integrate climate considerations into financial products, institutional strategies, operations, and monitoring systems.

Under Work Package 2, Activity 1.2 of the ICCAP Technical Assistance Grant, Shakti Foundation will develop and implement a Board-approved Integrated Climate Strategy covering climate finance and green internal operations; a Shakti climate finance taxonomy aligned with the Bangladesh Green Taxonomy; and a monitoring and reporting system that is embedded in Shakti's core ERP (Enterprise Resource Planning) system and supported by a practical tracking tool for internal operations, with staff trained to use it.

3.0 Objective

The purpose of the consultancy is to provide Shakti Foundation with an evidence-based and implementable climate strategy, together with a monitoring and reporting system that enables the organization to plan, track, learn from and communicate its climate-related performance and results.

Specifically, the consultancy will:

- Define a climate vision, strategic objectives and a 5-year roadmap aligned with Shakti's institutional mission and its focus on women (Action 1.2.1).
- Develop an institutional climate finance taxonomy aligned with the Bangladesh Green Taxonomy and contextualized to Shakti Foundation's target clients, priority sectors, financial products, and operational model (Action 1.2.2).
- Develop an internal Green Operations Strategy to strengthen Shakti Foundation's environmental performance, with a focus on paper reduction, energy efficiency, waste management, and other relevant operational measures (Action 1.2.3).
- Facilitate stakeholder workshops, board presentation and formal approval of an Integrated Climate Strategy (Action 1.2.4).
- Establish a Climate Monitoring and Reporting Framework by defining standardized indicators for the climate portfolio covering climate finance and green internal operations, along with standardized reporting templates and practical data requirements (Action 1.2.5).
- Specify the data requirements for, and quality-assure, the integration of taxonomy and climate finance indicators into Shakti's core ERP system by Shakti's IT team (Action 1.2.6).
- Establish an Excel-based tracking system for internal green operations indicators to support regular data collection, monitoring, analysis, and reporting of Shakti Foundation's environmental performance (Action 1.2.7).
- Strengthen institutional capacity by building the knowledge and skills of relevant Shakti Foundation staff to implement the Climate Strategy and M&R Framework, collect and manage climate-related data, track indicators and effectively use reporting tools and dashboards (Action 1.2.8).

4.0 Scope of Work & Key Actions

The scope of this assignment is aligned with Activity 1.2 of the approved TA Plan and covers the following tasks:

Inception phase

- Hold a kick-off meeting with Shakti Foundation senior management, the Technical Working Group (see Section 7) and ADA (if available) to confirm scope, priorities, timelines, communication protocols and the division of roles between the Consultant/Firm and the Shakti team.

- Review key documents, including Shakti's strategic plan, policies and manuals, Social and Environmental Performance (SEPM) audit report (when it becomes available), existing Climate Change Program documents, annual reports, ERP data structure and current reporting formats.
- Conduct a rapid diagnostic of Shakti's loan portfolio by product, loan purpose, sector and geography, including exposure to climate-vulnerable districts.
- Confirm the latest applicable versions of the Bangladesh Bank Sustainable Finance Policy, Green Taxonomy, related circulars and reporting formats.
- Prepare an Inception Report including, but not limited to, a stakeholder map, data request list, detailed methodology, week-by-week work plan, allocation of working days, a plan for the four workshops and the field visit, and confirmation of the board meeting date.

4.1 Action 1.2.1 - Define climate vision, objectives and strategic roadmap aligned with Shakti's institutional mission

- Conduct a baseline review of Shakti's mission, vision, priorities, Climate Change Program, product portfolio, client segments and geographic footprint to identify strengths, gaps and opportunities.
- Assess the main climate risks and adaptation needs of Shakti and its core client segments, with particular attention to low-income women borrowers in urban, peri-urban and rural locations
- Review alignment with national climate policies, the Bangladesh Bank sustainable finance framework, MRA and PKSF requirements where relevant, and the expectations of lenders and development partners, drawing briefly on practice from peer institutions.
- Review alignment with Bangladesh's Nationally Determined Contribution and National Adaptation Plan, since demonstrable alignment with national climate priorities is a standard requirement of international climate finance.
- Design and facilitate Workshop 1 (Climate Visioning) with senior management and department heads.
- Map potential funding and refinancing avenues relevant to a licensed MFI, including Bangladesh Bank refinancing schemes, climate funds, and concessional and blended finance sources, and international climate funds, indicating which are realistically accessible over the roadmap period and on what basis.
- Formulate a clear and achievable climate vision statement, four to six specific institutional objectives and measurable targets covering, at a minimum, climate finance (adaptation and mitigation), client resilience, climate risk management, green internal operations, and governance and disclosure.

- Develop a 5-year strategic roadmap with implementation phases, indicative portfolio targets, institutional responsibilities, key milestones and resource requirements
- Identify the governance arrangements required to implement the strategy, including management responsibilities, a climate focal unit or committee, and integration into existing policies and processes, taking into account the governance and oversight expectations that international funders apply to implementing institutions.
- Ensure coherence with the ESG and GESI frameworks being developed under ICCAP/ADA technical assistance

4.2 Action 1.2.2 - Develop taxonomy focusing on Shakti's priority sectors in line with the Bangladesh Green Taxonomy

- Conduct a detailed review of the Bangladesh Bank Green Taxonomy and Sustainable Finance Taxonomy, the latest related circulars, product lists and reporting formats, and relevant international references for climate finance tracking in microfinance.
- Identify Shakti's priority sectors for climate finance (for example agriculture, agro-processing and storage, water and sanitation, renewable energy, energy-efficient and resilient housing, climate-resilient micro-enterprise and livelihoods) based on the portfolio diagnostic and strategic direction.
- Test the priority sectors at Workshop 2 (Taxonomy and Priority Sectors) with senior management, microfinance operations, climate change program and other relevant staff.
- Define taxonomy categories and sub-categories (for example climate adaptation, climate mitigation and other environmental objectives), eligibility criteria and supporting evidence requirements for each category. Ensure the evidence and documentation standards attached to each category are sufficient to withstand external verification by a funder or its appointed reviewer, not only internal management use.
- Map Shakti's existing loan products and loan purpose codes against the taxonomy to identify eligible, potentially eligible and non-eligible activities.
- Map the taxonomy categories against the mitigation and adaptation results areas and investment criteria used by the major international climate funds, so that Shakti can show at portfolio level which activities would be eligible under such financing and where its strongest case lies.
- Develop user-friendly categorization codes and a practical decision tree that microfinance loan officers can apply during appraisals without needing specialist technical knowledge. Establish corresponding taxonomy tags for direct integration into the Shakti ERP system to enable automated classification and portfolio-level tracking of climate finance.
- Pilot-test the taxonomy on a sample of loan files from branches in different agro-ecological zones (collected by the Shakti team) and refine it based on results.

- Estimate the baseline share of Shakti's active portfolio that qualifies under the taxonomy.
- Design the taxonomy for forward compatibility, so that categories and criteria can be updated as national and international climate disclosure standards evolve.
- Define minimum climate finance safeguards, including GESI considerations and measures to mitigate greenwashing risks, with clear verification requirements, documentation standards, and procedures for periodic review and updating of the safeguards.

4.3 Action 1.2.3 - Develop internal green operations strategy including paper reduction, energy efficiency, and waste management

The baseline assessment under this task covers the head office and the in-house training centers. Branch-level rollout is addressed through guidelines and indicators rather than through branch-by-branch measurement.

- Conduct a baseline assessment of resource use and waste at the head office and training facilities covering:
 - Paper consumption, printing and documentation practices, including scope for digitization of loan documentation, internal reporting and approvals; expansion of digital collections; printing guidelines; and records management.
 - Energy use, including electricity consumption, lighting, cooling, generator/back-up power. Identify measures such as LED lighting, efficient air-conditioning use and settings, equipment standards and rooftop solar feasibility at owned premises.
 - Waste generation and disposal, including e-waste and general office waste. Propose practices for waste segregation, reduction and recycling, safe e-waste disposal and plastic reduction.
 - Water use and travel/fleet-related emissions where material, including fuel-efficient vehicle and travel practices.
- Develop a green operations strategy with clear objectives, targets, timelines and assigned responsibilities, distinguishing head office measures from measures to be cascaded to branches.
- Design and facilitate Workshop 3 (Green Operations) with administration, procurement, finance and other relevant staff to prioritize practical, low-cost measures suitable for the head office and training center.
- For priority measures, estimate indicative costs, savings and feasibility, and set targets, responsibilities, green procurement criteria and a phased implementation plan.
- Prepare a green office guideline / standard operating procedure for staff.
- Define the baseline against which future internal operations performance will be measured.

4.4 Action 1.2.4 - Conduct stakeholder consultations, prepare board presentation, and finalize and approve integrated Climate Strategy

- Consolidate Tasks 1.2.1 to 1.2.3 into a single, coherent Integrated Climate Strategy document with an executive summary and implementation plan.
- To review the draft outputs of Actions 1.2.1 to 1.2.3, design and facilitate Workshop 4 (Strategy Validation) with senior management, department heads, regional and area managers, branch and other relevant staff, women clients (including focus group discussions in climate-vulnerable areas), lenders and development partners, regulators, apex bodies, sector networks, and ICCAP/ADA technical staff.
- Prepare a brief report for each of the four workshops summarizing participation, key inputs and how they were addressed.
- Prepare a Board-level presentation, including a concise decision note setting out strategic choices, resource implications and risks.
- Incorporate Board and management feedback and produce the final approved version of the Integrated Climate Strategy.
- Prepare a short summary version of the approved strategy suitable for external communication.

4.5 Action 1.2.5 - Define climate portfolio and internal operations monitoring indicators and create reporting templates

- Develop a results framework that links each strategic objective to measurable output and outcome indicators.
- Define climate portfolio indicators (for example volume and number of taxonomy-aligned loans by category, share of total portfolio, clients reached, and portfolio quality in climate-vulnerable areas).
- Ensure borrower-level disaggregation by sex, product, income, occupation, ethnicity, location and disability status, in line with ICCAP Output II reporting requirements
- Define internal operations indicators covering paper, energy, waste and related consumption, consistent with the baseline established under Task 1.2.3 (for example energy use per staff member, paper consumption, waste generated and recycled, and operational GHG emissions).
- Prepare an indicator reference sheet for each indicator, covering definition, calculation formula, unit, disaggregation, data source, collection method, frequency, responsible person, reporting lines, baseline and target.
- Ensure each indicator can be mapped to the core indicators commonly used by international climate funds, including direct and indirect beneficiary counts, beneficiaries as a proportion

of the relevant population, and estimated emissions reduced where mitigation activities are financed. Record the mapping in the indicator reference sheets.

- Deliver three core reporting templates including:
 - A field data capture template for branch and regional use, feeding the ERP and the internal operations tracker.
 - A quarterly internal performance report for management and the Board, including the dashboard structure and a standard commentary format.
 - An external reporting template, structured so that the same underlying data can be mapped to both ICCAP Output II requirements and Bangladesh Bank sustainable finance reporting formats, and to international climate fund core indicator reporting.
- Align the indicator framework with the ESG Framework developed under ICCAP/ADA technical assistance and with Bangladesh Bank sustainable finance reporting formats
- Define data quality assurance, validation and internal audit procedures, including roles, deadlines and verification checks. Document the data quality and verification arrangements to a standard capable of supporting external assurance.

4.6 Action 1.2.6 - Integrate taxonomy and climate finance monitoring indicators into core ERP system

The integration will be carried out by Shakti's IT team. The Consultant/Firm's role is to specify what the system must capture and report, and to check the result.

- Review the existing core ERP system architecture, data structures, loan purpose coding, reporting modules and integration constraints with the IT Team.
- Conduct a gap analysis between the data requirements of the taxonomy and monitoring framework and the existing ERP capabilities.
- Prepare a data requirements specification covering new or modified data fields, code lists, validation rules, user roles, automated classification logic, and standard reports and dashboards, including:
 - Loan categorization codes derived from the Shakti climate finance taxonomy
 - Green activity type
 - Climate indicator data fields at client, loan and branch level
 - Automated reporting features and dashboards
 - Disaggregation fields required for ICCAP and regulatory reporting
 - Beneficiary and safeguard fields required for international climate finance reporting, in particular the basis for distinguishing direct from indirect beneficiaries and a simple environmental and social risk screening flag at loan level.

- Provide test scenarios and acceptance criteria for the IT team to work against.
- Review the IT team's configuration and sample reports against the specification on one occasion, recording any gaps and recommended fixes in a short ERP Integration Review Note.
- Provide a brief written recommendation on how Shakti may approach back-classification of the existing active portfolio in future.

4.7 Action 1.2.7 - Establish Excel-based tracking system for internal operations indicators

- Develop a user-friendly Excel-based tool to track green operations indicators across head office and training centers.
- Include pre-formatted data entry sheets with built-in validation, protected formulas, clear instructions and dashboards showing trends against the established baseline and targets.
- Define the data collection cycle, submission workflow, consolidation responsibilities and reporting calendar.
- Test the tool in the head office and refine it based on user feedback.
- Prepare a user guide, together with a protocol for file management, version control and data submission.
- Ensure the tool is designed for straightforward future migration into the ERP environment or a web-based platform, should Shakti choose to automate it.

4.8 Action 1.2.8 - Train relevant staff on data collection procedures and reporting protocols

- Conduct a brief training needs assessment across the relevant staff categories, drawing on the TWG.
- Develop Standard Operating Procedures (SOPs) on data collection procedures and reporting protocols, covering taxonomy classification, ERP data entry, internal operations data, validation and the reporting calendar.
- Develop training materials, including modules, facilitator guides, participant handouts and day-to-day job aids (such as a classification quick guide and a reporting calendar), suitable for reuse by in-house trainers.
- Deliver a Training-of-Trainers (ToT) program of approximately four days to a single cohort of participants drawn from the Climate Change Program, microfinance operations, IT, finance, administration and the in-house training centers, covering:
 - Application of the climate finance taxonomy and loan categorization at appraisal
 - Data collection procedures and source documentation requirements
 - Reporting and monitoring protocols, including frequency and quality standards
 - Use of the ERP climate module, dashboards and the Excel-based internal operations tracker

- Implementation of the green operations guidelines at head office and branch level
- Using climate data for decision-making
- Facilitation skills and use of the materials for cascade delivery
- Conduct pre- and post-training assessments and prepare a training completion report, including a cascade plan for Shakti's in-house training centers and recommendations for refresher training and new staff onboarding.

4.9 Final reporting and handover

The Consultant/Firm shall prepare a Final Assignment Report summarizing the work completed, key findings, lessons learned, implementation risks and recommendations for sustaining the strategy and systems, and shall hand over all editable source files (documents, templates, Excel tools, presentations and training materials) to Shakti Foundation.

5.0 Expected Outputs

- Inception Report, including the detailed work plan and allocation of professional days.
- Board-approved Integrated Climate Strategy for Shakti, incorporating climate finance vision, objectives and strategic roadmap.
- Shakti Climate Finance Taxonomy aligned with the Bangladesh Green Taxonomy, with loan categorization codes, ERP tags, application guidance, product mapping, pilot results and an indicative portfolio estimate.
- Internal Green Operations Strategy with baseline assessment, targets, costed measures and green office guidelines.
- Stakeholder Consultation Reports and Board Presentation.
- Climate Monitoring and Reporting Framework, including indicator reference sheets and three core reporting templates.
- ERP Data Requirements Specification, test scenarios and ERP Integration Review Note.
- Tested Excel Internal Operations Tracking Tool and User Guide.
- SOP Manual, Training Materials and Training-of-Trainers Completion Report with cascade plan.
- Final Assignment Report and Handover Package.

6.0 Deliverables and Timelines

Deliverables	M1	M2	M3	M4	M5	M6
Inception Report						
1.2.1 Vision, objectives and roadmap						
1.2.2 Climate finance taxonomy						
1.2.3 Green operations strategy						
Field visit						
Stakeholder workshops	W1	W2, W3	W4			
1.2.4 Consolidation and board approval						
1.2.5 Monitoring indicators and reporting templates						
1.2.6 ERP specification and review						
ERP configuration (Shakti IT team)						
1.2.7 Excel tracking tool						
1.2.8 SOPs, materials and ToT delivery						
Final report and handover						

All deliverables shall be submitted in English, in both editable and PDF format, and are subject to review and written acceptance by Shakti in consultation with ICCAP/ADA prior to the release of the corresponding payment.

7.0 Duration and Working Modality

- Duration: 6 months from contract signing
- Work Approach:
 - Evidence-Based Assessment: Conduct comprehensive desk reviews, data-gap assessments, and climate risk/vulnerability analyses that merge credible secondary data with institutional and community-level experiences.
 - Participatory Engagement & Co-Design: Facilitate key-informant interviews, field visits, and focused co-design sessions across all levels—from frontline staff and community stakeholders to program/support functions—to ensure deep institutional ownership of the strategy and monitoring frameworks.

- Iterative Development & Testing: Utilize a feedback-driven process to draft, validate, and practically pilot-test strategies, monitoring indicators, and tools before finalization.
- Capacity Building: Deliver targeted training and capacity-building initiatives to ensure the organization can seamlessly implement and sustain the new frameworks.
- Ethical & Inclusive Integration: Mainstream gender equality, social inclusion, safeguarding, "do-no-harm" principles, data protection, and ethical participation throughout all phases of the assignment.
- Alignment by design: outputs are developed against international climate finance conventions from the outset, so that they remain usable as Shakti's funding base widens, without substantial rework.
- Field Requirements: Field engagement at selected branches is required for the operations baseline, pilot testing and staff training.
- Coordination: Close coordination with Shakti Foundation Technical Working Group and ICCAP focal persons. A Technical Working Group (TWG) will be formed, comprising representatives from Shakti Foundation Climate Change Program, Microfinance Operations, Finance and Accounts, IT, Administration, Procurement, Human Resources and relevant operational units.
- Shakti will provide access to relevant institutional data, systems, staff and branch locations, subject to its confidentiality and data protection requirements.
- The Consultant/Firm is responsible for its own logistics, equipment, travel and workspace arrangements unless otherwise agreed.

8.0 Required Qualifications

- The assignment must be undertaken by a consultant or firm with demonstrated experience and knowledge in climate strategy development, green/climate taxonomy design, environmental management, MIS systems and institutional capacity building.
- Lead Consultant Qualifications:
 - Education: Advanced university degree in climate change, environmental science/management, development studies, economics, public policy, public health, or a related discipline.
 - Experience: At least 10 years of professional experience leading climate strategy, adaptation/resilience initiatives, or climate-related organizational reporting.
 - Familiarity with international climate fund access processes, and the ability to advise a Board credibly on their realistic timeframes and institutional demands.
- Deep understanding of Bangladesh's climate risks, vulnerable populations, and development sector, specifically including the Bangladesh Green Taxonomy and Bangladesh Bank sustainable finance policies.

- Completion of at least three comparable assignments for microfinance institutions, NGO-MFIs, financial service providers, development agencies, or other multi-site organizations preferably in Bangladesh or comparable contexts.
- Demonstrated, evidenced experience of international climate fund processes. At least one team member must have worked directly on accreditation support, a readiness proposal, a funding proposal or concept note, or an equivalent institutional assessment for a multilateral climate fund such as the Green Climate Fund, the Adaptation Fund or the Global Environment Facility. Proposals must name the assignment, the entity and the role played; general familiarity will not be accepted.
- Demonstrated experience building data systems and integrating monitoring indicators directly into Management Information Systems (MIS) or core banking systems to drive decision-oriented reporting.
- Capacity to engage with senior management on strategy development and approval processes.
- Excellent analytical, facilitation and written English skills; working capacity in Bangla is strongly preferred.
- For firms/teams, a clear, well-structured team offering complementary expertise in climate strategy, MEL (Monitoring, Evaluation, and Learning), organizational change, and gender/social inclusion.

9.0 Reporting and Supervision

- Primary reporting to the ICCAP Focal Person at Shakti Foundation.
- Regular coordination will be required with Shakti Foundation's Microfinance Program, Human Resources (HR), Information and Technology (IT) teams and relevant operational units.
- The Consultant/Firm will submit brief monthly progress updates and meet the TWG at least monthly.
- The TWG will review deliverables, facilitate access to information and staff, and provide technical guidance. Key deliverables will be reviewed by ICCAP/ADA technical staff, where applicable, prior to acceptance.

10.0 Confidentiality & Ethical Conduct

All information, data, and outputs produced under this assignment shall remain the property of Shakti Foundation for Disadvantaged Women and the ICCAP project. The Consultant/Firm must adhere to professional integrity and confidentiality standards throughout the engagement.

11.0 Payment Schedule

Milestone	Payment %
Inception Report	10%
Climate roadmap, taxonomy and green operations strategy	20%
Consultation report and board-approved Integrated Climate Strategy	20%
M&R framework, ERP specification and Excel tracking tool	20%
SOP/training materials and ERP review	15%
Training completion report and Final Report	15%
Total	100%

12.0 Evaluation Criteria

Component	Weight	Details
Stage 1: Technical Evaluation	80%	Technical Proposal (70%) + Interview (10%)
Stage 2: Financial Evaluation	20%	Only technically qualified bidders proceed

Technical Scoring Criteria

The Technical Proposal Score (TPS) is evaluated out of 100 points based on the following criteria.

Criteria	Points	
Relevant experience in climate strategy and taxonomy development for financial institutions	15	Track record on comparable assignments
Knowledge of the Bangladesh Green Taxonomy and Bangladesh Bank sustainable finance policy	10	Demonstrated in the proposal, not asserted
Demonstrated experience of international climate fund processes: accreditation, readiness or funding proposals, or institutional assessment	10	Named assignments, entities and roles required
Experience specifying climate or ESG indicators for MIS, core banking or ERP systems	10	Evidence of system-level work
Methodology and approach, including realism of the work plan against the indicative level of effort	25	Technical soundness and deliverability
Team Composition & Qualifications	20	Key expert profiles and team structure
Capacity building, Training-of-Trainers and facilitation track record	10	Materials and delivery experience
Total Technical Score	100	

Minimum Qualifying Score: Bidders must achieve a minimum Technical Score of **70 out of 100** to proceed to Interview and financial evaluation. This threshold is aligned with international standard procurement practices.

Interview & Presentation Score (IPS) – 10 Points

- Understanding of assignment: 4 points
- Practical implementation approach: 3 points
- Communication and presentation quality: 3 points

Total Technical Score (TS) = (TPS * 70%) + IPS

Financial Scoring

Financial proposals are evaluated only for technically qualified bidders. The Financial Score (FS) is calculated out of 20 points using the following formula:

FS = (Lowest Financial Proposal ÷ Bidder's Financial Proposal) × 20

Final Score Calculation

Final Score = TS + FS (Maximum 100 points)

Where TS = Technical Score (out of 80) and FS = Financial Score (out of 20). The bidder with the highest combined score will be recommended for selection, subject to successful negotiation and reference verification.

13.0 Submission Requirements

Interested firms/individuals are requested to submit their Technical and Financial Proposals (in separate sealed envelopes or separate email with attachments)

Technical Proposal

- Detailed understanding of the assignment and proposed approach
- Comprehensive methodology and work plan
- Organizational organogram and profiles of key personnel, including names, roles, qualifications, and CVs.
- Evidence of similar assignments completed successfully

Financial Proposal

- Detailed budget breakdown in local currency (BDT), inclusive of all applicable VAT and taxes
- Fee rates for all proposed personnel
- Reimbursable expenses itemized separately

Legal and Organizational Documents

- Certificate of incorporation or trade license
- Registration with relevant government authorities
- Tax Identification Number (TIN) and Business Identification Number (BIN)
- Latest Proof of Submission of Income Tax Return
- Signed statement of accuracy and truthfulness

Submission Deadline and Method

- Interested local and international individuals, consultancy firms, and consortium of consultants are requested to submit their Proposals online at the following email fhossian@shakti.org.bd by Date: 31/10/ 2026 Time: 11.59 PM
- Email Subject line should clearly mention the Assignment Name as stated in the ToR
- Proposals received after the deadline will not be considered
- Contact information for clarification queries: fhossian@shakti.org.bd