

Request for Proposal (RFP) - Financial Health Scorecard Implementation and Data Set Development

i3-Access associated with Access Development Services is pleased to invite organizations to submit a proposal in response to this Request for Proposal (RFP) for the implementation of the Financial Health Scorecard and the development of a comprehensive data set for various customer segments. This initiative is part of the i3-access program, hosted by Access Development Services and Lead Krea University, with the primary aim of assessing and enhancing the financial health of specific customer segments, including youth, smallholder farmers, informal/blue-collar workers, women entrepreneurs, and others.

Background and Objectives:

The primary objectives of this RFP are as follows:

- a. To assess the applicability and relevance of the Financial Health Scorecard questions across different customer segments.
- b. To understand the financial health of the targeted segments and identify areas of improvement.
- c. To combine the Financial Health Scorecard with financial and business capability engagement activities.

Scope of Work:

The selected partner(s) will be responsible for the following tasks:

- a. Administering the Financial Health Scorecard to the specified customer segments. Organizations can propose a segment relevant to them.
- b. Analyzing the results and providing insights into the financial health of each segment.
- c. Creating a seamless connection between the Financial Health Scorecard and the collection model through APIs where possible.
- d. Proposing a suitable mode of data collection. The cost of data collection on a per-customer basis should be less than USD 10 per person.
- e. Additionality can be suggested for the proposal on youth on connecting financial health scorecards and financial capability. Suggest ways of development of the content related to the same.

Eligibility Criteria:

To be eligible to submit a proposal, organizations must meet the following criteria:

- a. Proven experience in engaging with customer segments through existing programs or business activities.
- b. Should have a presence in the field or through a platform approach to engage with the respective segment.
- c. Should be able to engage with at least 1000-5000 people for implementing the scorecard.

Proposal Submission Deadline:

All proposals must be submitted by no later than Nov 13, 2023. Submissions received after this date will not be considered. We are looking to sign the contract with at least 2-3 providers with one each for a segment. The project needs to be completed by Nov 15, 2023.

Proposal Details:

Proposals should include the following details:

- a. Detailed methodology for conducting the Financial Health Scorecard assessments.
- b. Description of the captive customer base in the specified segments.
- c. Proposed data collection methods and tools.
- d. Financial and operational proposal, including a breakdown of costs.
- e. Proposed timeline for project execution.

Contact Information:

All inquiries and submissions related to this RFP should be directed to swechcha@i3access.org

i3-Access associated with Access Development Services looks forward to receiving your proposal and appreciates your interest in this important initiative. We believe that your organization's expertise will contribute significantly to the success of this project.