



Notice Inviting Tender (NIT)

**For Selection of Agency for Conducting Field Survey and data entry in r/o
Study “The Evolving Role of Self-Help Groups (SHGs) in Building Rural
Entrepreneurs”**

**Bankers Institute of Rural Development (BIRD),
Sector- H, LDA Colony, Kanpur Road, Lucknow-226012**

Disclaimer

This Notice Inviting Tender (NIT) is an invitation to receive response from eligible interested agencies for conducting Field Survey and data entry in r/o Study “The Evolving Role of Self-Help Groups (SHGs) in Building Rural Entrepreneurs”. No contractual obligation whatsoever shall arise from this tender process. This document should be read in its entirety.

In the event of unforeseen circumstances, if BIRD assesses that a situation has arisen wherein it is not conducive for conducting the tender process, BIRD reserves the right to reschedule/modify/cancel the process at any stage without assigning any reason thereof. However, the relevant information in this regard will be posted on BIRD’s website suitably.

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Official Correspondence Details

Director

Bankers Institute of Rural Development (BIRD),
Sector- H, LDA Colony, Kanpur Road, Lucknow-226012

Email: bird@nabard.org

Phone no: 0522-2421954

For any clarification, please contact the following officials:

1	Shri Hemant S Patil Assistant General Manager, Bankers Institute of Rural Development (BIRD) Email Id – cmr.bird@nabard.org Tel 0522-2421136
2	Dr. Gyanendra Rout Deputy General Manager Bankers Institute of Rural Development (BIRD) Email Id – cmr.bird@nabard.org Tel 0522-2421119

1. Introduction:

Bankers Institute of Rural Development (BIRD), Lucknow is a premier apex learning institution established by the National Bank for Agriculture and Rural Development (NABARD), India's leading development finance institution dedicated to agriculture and rural development. Founded in 1983 initially as a training hub for Regional Rural Banks, BIRD has evolved into a comprehensive capacity-building institution engaged in training, research, and consultancy across the spectrum of agriculture and rural development banking. Its core mandate encompasses domestic and international programs in training, research, and consultancy, and it serves a diverse client base including banks, NGOs, microfinance institutions, government bodies, small finance banks, and farmers' producer organizations.

Centre for Research on Financial Inclusion and Microfinance (CRFIM) has been established within BIRD, Lucknow to undertake studies, research, and policy advocacy in the areas of financial inclusion and microfinance. CRFIM conducts multidisciplinary research on policy implementation, operational issues, and best practices in microfinance and financial inclusion. Its findings are disseminated to stakeholders through workshops, seminars, and training programs at BIRD to facilitate policy initiatives and enhance the design and delivery of inclusive financial services.

The Centre is presently conducting a study titled "The Evolving Role of Self-Help Groups (SHGs) in Building Rural Entrepreneurs." The study aims to assess the contribution of SHGs in promoting entrepreneurship among rural women, particularly through initiatives like *Lakhpati Didi* and other livelihood promotion interventions.

In this context, BIRD invites sealed quotations in a two-bid system (as per the prescribed format) from its empaneled/other agencies for field survey and data entry services in connection with the above-mentioned study. This Notice Inviting Tender (NIT) provides details on the scope of work, Key deliverables, timeline of the project for conducting the survey on behalf of BIRD.

2. Scope of Work

- i. **Planning & Coordination:** The agency will plan and coordinate fieldwork activities in consultation with BIRD, deploy trained investigators and supervisors with knowledge of local context, language, and customs, and ensure all field staff undergo adequate training before commencement of the survey.
- ii. **Sample Selection & Coverage:** The study will be conducted in 6 States viz. Assam, Karnataka, Maharashtra, Rajasthan, Uttar Pradesh and West Bengal. From these states 18 Districts (3 from each States) will be selected by BIRD and provided to the agency. The agency, in consultation with BIRD, will select 20 active SHGs from each selected district. Further, from each selected SHG, three members/Lakhpati Didis engaged in entrepreneurial activities will be selected by the agency in consultation with BIRD. The final sample will include 1,080 members from 360 SHGs across 18 districts in six states.
- iii. **Training of Enumerators:** The agency will deploy enumerators with proficiency in local languages and prior gender-sensitive field experience. The agency will conduct enumerator training before full-scale rollout to ensure uniformity and quality of data collection, in consultation with BIRD.

- iv. **Survey Administration:** BIRD will provide two separate structured survey questionnaires (1 for members & 1 for group) to the agency. The agency will translate them in bi-lingual form by inserting the applicable local languages and digitize the same using Computer Assisted Personal Interview (CAPI) method. The agency will approach the selected SHGs and identify three suitable members/Lakhpati Didis engaged in entrepreneurial activities for personal interviews. The agency will administer the survey using CAPI tool and ensure that each interview is conducted ethically with prior informed consent.
- v. **Documentation of Success Stories & Insights:** The agency will document at least two SHG-led entrepreneurship success stories per state, highlighting the context, process, outcomes, and lessons, and will also record and submit field-level challenges and state-wise insights observed during the course of data collection. The agency will also provide 3–5 high-resolution photographs per district capturing the survey being done.
- vi. **Quality Checks:** The agency will capture GPS coordinates of all surveyed households while also maintaining daily field logs to ensure data reliability with regular updates shared with BIRD. Capturing GPS coordinates is compulsory for quality checks; any failure to do so will render the interview liable for cancellation. Repeated instances of missing GPS data will be treated seriously, may attract penalties, and can be considered a violation of the contract, including grounds for termination.
- vii. **Data Entry and Submission**

The agency will do the data entry and related works and ensure delivery of cleaned and validated datasets in Excel/CSV format accompanied by codebooks and metadata and submit filled-in CAPI files or questionnaires in the format specified by BIRD.
- viii. **Confidentiality**

The agency will treat all collected data as confidential, ensure its secure handling and storage, and refrain from using it for any other purpose without written permission, with all rights over survey instruments, data, and outputs retained by BIRD.
- ix. **Information sharing**

The agency will furnish clarifications, documents or survey-related material as required by BIRD at any stage during or after fieldwork.

3. Deliverables

- Delivering cleaned and validated datasets in Excel/CSV format, accompanied by detailed codebooks, variable descriptions, and metadata.
- Record and submit documentation of field-level challenges and state-wise insights observed during the survey.
- Document at least two SHG-led rural entrepreneurship success stories per state, with structured details (background, process, and activity based photos).
- Submit a minimum of 3–5 high-resolution photographs per district, capturing enumerator–respondent interaction
- The entire exercise to be completed within 45 days from the date of issue of work order.

4. Schedule

SI	Items	Timeline
1	Date of publication of NIT	31 October 2025
2	Last date of submission of tender (quotations)	14 November 2025
3	Selection of agency	To be uploaded in BIRD website and intimated to the selected agency
4	Assignment Period	45 days from the date of issue of Work Order

5. Technical bidding, Financial Bidding

During technical evaluation, the agencies will be evaluated by a Technical Committee on the basis of the details provided by the agency at Annexure-1 and Annexure-2. The supporting documents submitted to substantiate the data shall be used to scrutinize the agencies based on the parameters of the technical bid. The agency must score minimum qualifying marks of 70% for being considered for opening the financial bid.

For the financial bidding, all the agencies to quote a consolidated rate of remuneration for survey per questionnaire (including applicable taxes) as per the format specified in Annexure-4. No escalation of the quoted amount will be allowed on any account during the term of the contract. All payments shall be made in Indian Rupee and shall be subject to applicable Indian laws.

6. Evaluation Criteria

- Selection of agency will be done after evaluation of technical bid and financial bid on the basis of Quality cum Cost Based Evaluation Criteria (QCBS) method.
- Quality cum Cost Based Evaluation Criteria (QCBS): Under QCBS, bids will be evaluated in two stages i.e. Technical Evaluation (Quality) and Financial Evaluation (Cost)
- Each bid will be scored out of 100, with weightage, as under:
 - a) Technical Score (T): 80%
 - b) Financial Score (F): 20%

➤ Technical Evaluation Criteria (80 Marks)

SI	Criteria	Max Marks	Description
1	Agency's Experience*	20	Past projects of similar nature and scale
2	Survey Methodology & Work Plan	25	Clarity, feasibility, innovation in approach
3	Team Composition & Expertise	25	Qualifications and experience of key personnel and gender-sensitive field enumerators
4	Infrastructure & Technology Use	10	Use of tools, software, equipment
	Total	80	

** Agency's Experience will be evaluated as per information provided in Annexure-2. Additional weightage will be given for working with reputed organizations such as Government of India, State Governments, RBI, NABARD, BIRD Lucknow in conducting similar rural, agriculture, or SHGs-focused surveys across diverse regions of India.*

Bidders must score at least **70% of technical marks** (e.g., 56/80) to qualify for financial evaluation.

➤ **Financial Evaluation Criteria (20 Marks)**

The lowest financial bid (L1) will get full 20 marks.

Other bids will be scored proportionally i.e.

Financial Score = (L1 / Bid Price) × 20.

➤ **Final Score**

Final score calculation will be arrived by totaling Technical Score and Financial Score of the respective bidders i.e.

Final Score = Technical Score + Financial Score

7. General Terms and Conditions

- BIRD reserves the right to accept or reject any bid of any agency at its sole discretion without assigning any reason whatsoever.
- The ownership of data and final outputs will rest with CRFIM-BIRD.
- Confidentiality of data, internal processes, and administrative communications shall be maintained during and after the project duration.
- While on contract with BIRD and at any time thereafter, the agency shall not disclose or divulge to others or make public any such business/ administration related information acquired by them in course of its functions or otherwise, which could be detrimental to the interest of BIRD/ NABARD.
- The agency shall not publish any business/ administration related information/ data/ analysis pertaining to the assignment and the decision of BIRD/ NABARD in this regard shall be final and binding on the agency.
- Delay on the part of BIRD in exercising any right or privilege under the Terms and Conditions set out above shall not operate as waiver of that right or privilege.
- BIRD shall have the right to terminate the assignment with the selected agency at any time during the assignment period, by giving a written notice, if the agency (i) fails to deliver any or all of the services within the period(s) specified in the assignment or within any extension thereof granted by BIRD pursuant to conditions of the assignment, (ii) fails to provide the services to the satisfaction of BIRD and (iii) makes any statement, representation, warranty or furnishes any form in relation to the

services, which turns out to be false/ forged/ incorrect at any time during the contract period.

- BIRD reserves the right to revoke this assignment and call back the amount (s) already paid, in the event of non-completion of the assignment or otherwise.
- The agency shall not assign or subcontract the data collection work.

8. Payments Terms

- Prices quoted by the bidders should be inclusive of all local taxes, GST, duties, levies, transportation costs etc. Once a price is arrived at, the same should remain firm and should not be subject to escalation during the assignment duration.
- Bidder will be entirely responsible for all applicable present and future duties, levies, charges, license fees etc. in connection with delivery of services.
- Any increase in the rates of applicable taxes or impact of new taxes imposed by the central or state governments, subsequent to the submission of commercial bid shall be borne by BIRD and any subsequent reduction in the rates of applicable taxes or impact of new taxes shall be passed on to BIRD. This will remain applicable throughout the assignment period. No other cost whatsoever will be paid by BIRD.
- Payments, subject to satisfaction of the quality of the data, shall be made on the terms and conditions laid down in this NIT. Payments for the contract shall be made as under:

S.No.	Payment Terms	Percentage (%)
1	Advance on award of work & receipt of acceptance from the Agency	30
2	Completion of field work and submission of final data in relevant formats	50
3	After 1 month from the final data submission subject to satisfactory compliance of any further query.	20
Total		100

9. Dispute resolution

Disputes or differences whatsoever arising out of or relating to the construction, meaning, scope, operation or effect of the Bid shall be resolved amicably between Bidder's representative and BIRD's representative. In case of failure to resolve the disputes and differences amicably within 30 days of the receipt of notice by the other party, then the same shall be settled by arbitration in accordance with the Arbitration and Conciliation Act, 1996 and the award made in pursuance thereof shall be final, conclusive and binding on the parties. The venue of the arbitration shall be at Lucknow and the language of arbitration proceedings shall be in English.

10. Proposal Submission Requirements

Interested agencies are required to submit:

- a) For Technical Bid
 - i. Application Form (Annexure 1)
 - ii. Experience and Past survey details (Annexure 2)
 - iii. Survey Methodology & Work Plan
 - iv. Team Composition and expertise
 - v. Infrastructure & Technology Use
 - vi. Undertaking of Confidentiality (Annexure 3)

- b) For Financial Bid
 - i. Financial Bid (Annexure 4)

Please submit your quotation **separately** for Technical and Financial Bids in the prescribed format to -The Director, Bankers Institute of Rural Development, Sector H, LDA Colony, Kanpur Road, Lucknow-226012, email-cmr.bird@nabard.org /bird@nabard.org on or before **14th November 2025**.

Annexure 1
Proforma of Application Form

Sl	Items	Details
1	Name of the Agency	
2	Type of organization as per registration#	
3	Registration Number and Date of registration	
4	GSTIN#	
5	Name and designation of the authorized executive of the agency	
6	Contact No. of the authorized executive	
7	Email Id of the agency and the authorized executive	
8	Correspondence address of the agency	
9	Whether the agency has ever been blacklisted by a Union Ministry/Deptt., State Govt. or any Public Sector Undertaking? (YES/NO). If yes, please give details.	
10	Bank Account details (Copy of passbook / cancelled cheque leave) #	
11	Bank Account Name	
12	Bank Account Number	
13	IFSC	
14	Agency's PAN#	
15	Agency's TAN#	

#Copies of supporting documents shall be attached

Annexure-2
Details of Projects (Survey and related work) executed by the agency during the last 3 years (2022-23, 2023-24 & 2024-25)

Sl	Particulars of Survey and Data Entry	Details
1	Year of the Survey Work	
2	Name of the Survey Work	
3	Name of the Sponsoring Agency	
4	Amount of the Project	
5	Copy of the Work Order#	
6	Date of Commencement of Project	
7	Expected Date of Completion of Project	
8	Actual Date of Completion of Project	
9	Delay, if any, reasons thereof	
10	Penalty levied on the agency for the delay in execution of the project (in Rs.), if any	
11	Copy of Project Completion certificate / Contact number of the Sponsoring Agency#	
12	Total sample size	
13	Type of respondents (individuals / households / enterprises etc.)	
14	Survey conducted in how many States / Districts?	
15	Type of Survey (Manual / Digital)	
16	If digital, please describe the method and approach	
17	In case of digital survey, Whether the survey data made available on real-time basis? (Yes / No)	

#Copies of supporting documents shall be attached

Please provide separate sheet for each Project (Survey and related work).

Signature of the applicant

(With Seal)

Annexure 3
Undertaking of Confidentiality

(On the Agency's letterhead duly signed by an authorized signatory)

Date: __/__/2025

The Director
Bankers Institute of Rural Development
Sector-H, LDA Colony, Kanpur Road
Lucknow-226012

Dear Sir,

Sub: Notice Inviting Tender for Selection of Agency for Conduct of the study on- The Evolving Role of Self-Help Groups (SHGs) in Building Rural Entrepreneurs

We hereby undertake that we shall not reproduce, transmit, or make available the Tender document or any other information relating thereto, to any other party without BIRD's written permission. We further declare and undertake that all the deliverables and outcomes of the Survey shall be exclusively owned by BIRD and the right to publish, share, and use the same shall solely be vested with BIRD. We shall maintain confidentiality of the information including data, generated information, insights, knowledge and other outcomes of the work.

Yours faithfully,

Signature and Stamp of Agency's Authorized Signatory:

Name:

Designation:

Annexure 4
Proforma of Financial Bidding

Call for Quotation for Field Survey and Data Entry

The Director
Bankers Institute of Rural Development
Sector-H, LDA Colony, Kanpur Road
Lucknow-226012

In reference to call for quotation no..... dated we submit herewith the financial quotation for executing the entire work as mentioned in Scope of Works and Deliverables of this NIT.

Amt Rs.

Sl	Particulars	Cost*	Taxes	Total
1	Unit cost per Questionnaire			
2	Total Cost of the Assignment for survey and related works in respect of 1440 Questionnaires (1080 SHG Member Questionnaires + 360 SHG Questionnaires).			

*Cost includes all expenses for executing the entire work as mentioned in Scope of Works and Deliverables of this NIT.

I/We have gone through the Scope of Works and Deliverables and other requirements as stipulated in this NIT and confirm to accept and abide the same.

Date:

Name &Address

Seal & Signature