**EOI NO: OLM/TRIPTI/15-16/ 04 Dated:09.04.2015**

**REQUEST FOR EXPRESSION OF INTEREST**

**Credit No: Cr 44720-IN**

**Assignment Title: “Hiring of Individual Consultant for Study on Operational Viability & Sustainability of GPLF under TRIPTI Project”**

# 1. Introduction

# Government of Odisha has received credit $ 82.4 million from the International Development Association (IDA) and intends to apply part of the proceeds of this credit to payments under the contract for consultancy for project TRIPTI which is under Odisha Livelihoods Mission.

There has been phenomenal growth in number of Self Help Groups over the last two decades or so. The SHG Federations have been in existence for more than 20 years. The need for and roles of SHG federations, and financial federations in particular, have been a matter of debate for more than a decade. While the norms for SHGs for formation, membership, governance, financial dealings, financial linkages and costs of promotion have been well evolved and widely accepted as standards by policy-makers, financiers and funders, the same level of clarity for federation of SHGs has not evolved. This has been primarily due to the lack of consensus on how the federations should evolve, balance between size and ownership/closeness to members, financial versus non-financial intermediation, roles of federations and consequently the costs of promotion of a sustainable federation. There is a growing movement towards transforming federations into community based sustainable institutions that provide financial and non-financial services to SHGs.

2. **Back ground:**

Government of Odisha under the auspices of World Bank has been implementing “TRIPTI” Project in 10 coastal districts of Odisha. In the context of TRIPTI Project it is the Gram Panchayat Level Federations (GPLF) promoted by it. A total of 1020 GPLFs have been promoted and being strengthened over time. These GPLF have received Community Investment Fund (CIF) from the project as a grant. The GPLF is using this CIF to give it to the SHGs as loan on the basis of Micro Investment Plan and it further goes to the SHG members as a loan. Similarly,members repay to SHGs and further to GPLF level with interest. Hence, CIF act as a Resource in perpetuity. It is expected that out of the interest earned, the GPLF will be able to meet out all its operational, financial and capacity building needs. The proposed study shall look at the opportunities and challenges faced by these GPLFs and their level of operational viability and financial sustainability.

3. **Objectives of the Audit of GPLFs**

1. To impart training to a batch of 30 Master Trainers on the process of conducting financial assessment and GPLF functional efficiency.
2. To assess the operational viability and financial sustainability of 50 GPLFs promoted by TRIPTI Project in Odisha and to recommend strategies to strengthen them.
3. To plan and provide handholding support to these trained staff in conducting assessment and financial sustainability of GPLF.

4. **Scope:**

1. Draw out the plan and financial ratios by which viability and financial sustainability of 50 GPLF can be assessed.
2. Conduct the assessment of 5 GPLF on financial sustainability and self-reliance of GPLF out the 50 GPLFs as a demonstration to the 30 Master Trainers.
3. To understand the financial efficiency by which these 50 GPLF is functioning.
4. To identify the services provided by the GPLF and analyze their benefits to SHGs.
5. To assess the level of autonomy available to CLFs and their participation in the decision making.
6. To identify the constraints / challenges faced by GPLFs and recommend measures to address these.
7. To assess the mode of TRIPTI/OLM support to GPLFs and the kind of activities that can be handed over to GPLFs.
8. Train a batch of 30 master trainers on understanding balance sheet of GPLF, develop understanding on key ratios to assess the financial sustainability and efficiency by which GPLF function.
9. Formation of team of 2 members each i.e 15 teams and plan for conducting assessment of 45 GPLF on similar lines.
10. Provide hand holding support in the field while conducting the assessment.
11. Submit a detail report of assessment of 50 (5+45) GPLF.

5. The Contract period will be 45 days from the commencement of service.

6. The Odisha Livelihoods Mission (OLM) now invites eligible Individual Consultant to indicate their interest in providing the Services. Interested Consultants should provide information demonstrating that they have the required qualifications and relevant experience to perform the Services in the prescribed format (Annexure-I) .

7. **Eligibility:**

Minimum Educational Qualification: Master Degree in any discipline of social science or any other degree in Financial Management.MBA in Financial Management from a premier institute will be preferred.

The consultant should have minimum of 7 years of experience in: -

* Working with Micro Finance Institutions or NGOs involved in conducting Micro Finance functions.
* Must have experience in conducting the Financial Analysis of MFI on operations and its sustainability.
* Must have experience on imparting training and designing the key ratios to understand the financial sustainability and efficiency of MFI or Community Based MFI.

8. "The attention of interested Consultants is drawn to paragraph 1.9 of the World Bank’s Guidelines: Selection and Employment of Consultants [under IBRD Loans and IDA Credits & Grants] by World Bank Borrowers “Consultants Selection Guidelines of the World Bank dated January 2011” (“Consultant Guidelines”), setting forth the World Bank’s policy on conflict of interest. " "The Guidelines are available at

[www.worldbank.org/procurement](http://www.worldbank.org/procurement)."

9. A Consultant will be selected in accordance with the Individual Consultant Selection method set out in the Consultant Guidelines (World Bank Procurement Guidelines) January 2011. www.worldbank.org/procurement

10. Further information can be obtained at the address below during office hours i.e. 10.00 to 17.00 hours and the details of draft ToR can be seen and downloaded in OLM website [www.tripti.org](http://www.tripti.org) and [www.ormas.org](http://www.ormas.org).

11. In case of any Addendum/Clarification/Corrigendum/Extension regarding this EOI, the same will be published in the above websites.

12. Expressions of interest in sealed envelope must be delivered in a written form to the address below (in person, or by post ) latest by 24.04.2015 ,17.00 Hours (IST).

Address:

State Mission Director-cum-CEO

Odisha Livelihoods Mission

SIRD Campus, Unit-8

Bhubaneswar

Contact Person- Goutam Mohanty

PM-Procurement (06742560166)

 **State Mission Director-cum-CEO**

 **APPLICATION FORMAT Annexure-I**

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| **photo** |

1. Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. Father’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. Permanent Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. Address for Correspondence: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6. E-Mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7. Mobile No:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

8. Educational Qualification

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| Degree/Diploma Certificate  | Year  | College/ Institute  | Board/University/ Institution  | Subjects  | Division/ Marks  |
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9. Experience (reverse chronological order – latest first):

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| S.No  | Name Of Organisation  | Designation  | Tenure  | Responsibility/Assignment\*  | Achievement  |
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Certification:

I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes myself, my qualifications, and my experience and I am available to undertake the assignment. I understand that any misstatement or misrepresentation described herein may lead to my disqualification.

Place Signature

Date