

PROPOSAL FORMAT

GENERAL INSTRUCTIONS:

- Proposal should be accompanied by a covering letter on the letterhead of the Organisation along with the financial estimate. The letter must be signed by an authorised signatory of the proposing Organisation.
- Each page of the proposal and annexures should be stamped with Organisation seal and countersigned by authorised signatory of the proposing Organisation
- All requisite permissions and approvals from appropriate authorities should be obtained by the proposing Organisation and all statutory obligations and compliances met.
- For projects which require collaboration with a State Government/District Administration, the proposal should preferably lead to a tripartite agreement between the implementing Organisation, BPCL and the State Govt./District Administration.
- Proposals with incomplete documentation are liable to be rejected.
- BPCL reserves the right to accept/reject any proposal.
- In case the proposal gets approved, the Organisation would need to open a separate bank account for the CSR project.
- If the Organization proposes to undertake large scale projects they must furnish proof of having undertaken similar projects (Example Rs.5 crore and above), capability for executing it successfully as well share profile of the team/staff.
- Project proposals which mention capability in gathering real time data, technological intervention, project implementation support and impact assessment shall be given preference.



Date: - DD/MM/YYYY

To : Bharat Petroleum Corporation Ltd

Subject: Proposal for.....

1.0 About the Organisation/ संगठन के बारे में

(Organisational information- Historical overview/ past experience/ type of projects executed/ reach and presence within country & abroad/ staff strength/ success stories/accolades/awards received if any. Also give website link if available).

2.0 Background/ प्रष्ठभूमि

(Give details of project background elaborating on the need of proposed project. Kindly mention details of need assessment/appraisal carried out)

2.1 Thematic Area / विषयगत क्षेत्र

(Mention the thrust area/s, Schedule VII item and Sustainable Development Goal (SDG) under which the proposed project would be categorised)

Thrust Area	Schedule VII item
Education	(ii) promotion of education including special education
Environment Sustainability	(iv) Ensuring environmental sustainability
Health/Hygiene	(i) promoting healthcare including preventive healthcare and sanitation
Skill Development	(ii) employment enhancing vocational skills and livelihood enhancement projects
Community Development	(x) Rural development projects/ Multiple categories
Others or More than one of the above (Please Specify)	

Please specify the SDG/s in addition to the above.

3.0 Proposal / परियोजना प्रस्ताव

(Mention the proposal objectives. Explain the activities planned in order to achieve the specific objective/s along with the time frame)

3.1 Methodology / कार्यप्रणाली

(Define the methodology for implementation of the program such as implementation schedule, execution plan, selection criteria for specific beneficiaries etc.)

3.2 Target Group / □□□□□□ □□□□

(Mention Geographical area/location of the project and the profile of the beneficiaries - details of Male/Female, minority or vulnerable group/others etc)

3.3 Team for the project / परियोजना के लिए टीम

(Mention job profile & eligibility criteria for selection of staff/team members for the project i.e. qualifications & experience, Roles & responsibilities, Organization structure etc.)

3.4 Monitoring Mechanism / निगरानी तंत्र

(Mention the monitoring mechanism such as frequency of visits, plan for collection of data, monitoring of activity timeline & frequency of submission of reports)

4.1 Outcomes/Result expected / अपेक्षित परिणाम

(Mention the Quantitative & Qualitative outcomes expected from the project, outcomes should be directly linked to proposed objectives; specific targets should be benchmarked. It is recommended to use frameworks such as project matrix, verifiable indicators, data analysis.)

4.2 Execution Plan / निष्पादन योजना

(Gantt chart with time line against activities may be given in tabular/other form)

4.3 Impact Assessment/ प्रभाव का आकलन

(Mention the plan to measure the impact of planned interventions of this project as defined in the scope of work)

5.1 Financial Implications/ वित्तीय निहितार्थ

(Format given below is indicative. Based on the nature of the project, kindly use appropriate format)

- Breakup for each line item should be given. Separate annexure to be provided if needed
- Any procurement items has to be supported with documents proving competitive rate in the market.
- List down items covered under Administrative expenses.

Sr. No	Details	Per unit cost (A)	Total Number of Units (B)	Total Budget for 1 month/year (C=AXB)	Budget for ___ Months/Years (D=CX No. Of Months/Years)	Remarks (Justification of cost element)
1						
2						
3						
Sub Total (I)						
1						
2						
3						
Sub Total (II)						
1						
2						

3					
	SUB TOTAL (III)				
	IV = TOTAL Of (I+II+III)				
	V = ADMINISTRATIVE COST				
	GRAND TOTAL				
	Cost Per Beneficiary				

5.2 Tentative payment schedule/ अंतरिम भुगतान अनुसूची

(Link payment schedule with project deliverables and timeline. It will be reviewed by BPCL and the final payment schedule might differ significantly as per nature of the project & BPCL guidelines. For final payment, 10% of the total budget will be kept on hold until the submission of the project completion report and audited fund utilisation certificate)

Sr. No.	Description	% of Total Project Budget	Amount in Rs	Deliverables to be achieved
1	1 st Payment			
2	2 nd Payment			
3	3 rd Payment			
4	4 th payment after completion report of project			

	Grand Total			(In	words
				Only)	

6.0 Sustainability Plan/ स्थिरता योजना: -

(Provide an action plan giving details of how the project will be sustainable after exit of BPCL & the implementing partner. This must include maintenance and ownership of assets where applicable)

7.0 Conclusion/ निष्कर्ष -

8.0 Enclosures / संलग्नक –

1. Form A :- Attached (Yes/No)
2. Form B :- To be filled only for infrastructure project only. Attached (Yes/No)
3. Form C :- Attached (Yes/No)
4. Form D :- Attached (Yes/No)
5. Form E :- Attached (Yes/No)
6. Form F :- Attached (Yes/No)

Kindly ensure the Organisation Seal/Stamp & Sign on each page.

Form A

CHECKLIST FOR SUBMISSION OF DOCUMENTS			
Sr. No.	Description of documents	Attached (Yes / No)	Remark
1*	Trust deed		
2*	Certificate of incorporation/ Registration certificate		
3*	CSR 1 Registration certificate		
4*	Form 12 A		
5*	Form 80 G		
6	35 AC registration if any		
7*	PAN card		
8*	Last 3 financial years audited statements & ITR proof		
9*	Detailed proposal as per format given		
10	FCRA approval		
11	TDS exemption certificate if applicable		

12	GST Registration certificate if applicable		
13	2 Reference letters of past or present supporters for CSR project		

*Sr. Nos. are mandatory documents

Additional Information in respect of Audited Accounts as mentioned in Serial No. 7 of Form-A of the Proposal Format for submission of CSR Proposals.

1. Please give the sources of income for each of the last 3 Financial Years for which audited accounts have been submitted with the application.

(in Rs.)

Sr. No.	Sources of Funds	FY (.....)	FY (.....)	FY (.....)
1				
2				
3				
4				
5				
	Total			

2. Provide details of income, expenditure, assets and liabilities during the last 3 Financial Years for which audited accounts are being submitted along with the application.

Total Income:

(in Rs.)

FY (.....)	FY (.....)	FY (.....)	Major Reasons for variation	Major Reasons for variation
1	2	3	4 (1-2)	5 (2-3)

Total Expenditure:

(in Rs.)

FY (.....)	FY (.....)	FY (.....)	Major Reasons for variation	Major Reasons for variation
1	2	3	4 (1-2)	5 (2-3)

Total Assets:

(in Rs.)

FY (.....)	FY (.....)	FY (.....)	Major Reasons for variation	Major Reasons for variation
1	2	3	4 (1-2)	5 (2-3)

Total Liabilities:

(in Rs.)

FY (.....)	FY (.....)	FY (.....)	Major Reasons for variation	Major Reasons for variation
1	2	3	4 (1-2)	5 (2-3)

3. Provide details of expenditures incurred during last 3 Financial Years other than activities carried out by the NGO.

(in Rs.)

Sr. No.	Year	Amount of the Expenditure incurred other than the activities of the NGO	Description of the Expenditure incurred other than the activities of the NGO
1	FY (.....)		
2	FY (.....)		
3	FY (.....)		

Form B

CHECKLIST FOR INFRASTRUCTURE PROJECTS			
Sr. No.	Items	Attached (Yes/No)	Remarks
A	LAND RELATED		
1	Land Ownership document		
2	Property Card (Commercial/ Vastu/Wetland)		
B	ESTIMATES & APROVALS		
1	Drawings- Site Plan, Building Plan, Elevation, foundation / structural details. All drawings needs to be signed & stamped by Licensed Engineer/ Architect & Client. License no. / Registration no. of Architect/ Engineer needs to be mentioned.		
2	Drawings sanctioned by Govt. Authorities		
3	Basis of Estimate - For schedule items - Preferably to be made from latest CPWD/ DSR /State Govt published rate along with GST if any. Brought out items- Preferably to be made from Quotations of supplier / rate charts of Manufacturers. Estimated needs to be vetted by Govt. Engineer/ Retd. CPWD/ Retd State Govt. Engineer		

	Estimate also to be signed & stamped by licensed Engineer & Client		
4	Stability certificate needs to be attached issued by licensed engineer in case of expansion of existing building.		
C	EXECUTION WORKS		
1	Execution Plan (Mention in briefly, separate annexure can be attached)		

Form C

CHECKLIST FOR SUBMISSION OF PROPOSAL		
S. N.	Points	Details
1	Address of registered office of the Organisation (in India)	
2	Any branches of the Organisation? Kindly mention	
3	Registered as a trust/society/ section 8 company or Other	
4	How long has the Organisation been in existence in years?	
5	Which is the Organisation's geographical area of work?	

6	<p>What is/are your Organisation's expertise area/s?</p> <p>a. Skill Development b. Health & Hygiene c. Education d. Community Development e. Environment Sustainability f. Other/Multiple (Kindly mention)</p>	
7	Names of Board Members/Trustees and CEO.	
8	Are any of the trustees/board members affiliated to any political / religious Organization?	
9	What are the sources of funding of the Organisation?	
10	Has the Organisation received any awards/recognition for its work? Kindly mention	
11	Does it receive funds / implement programs for the government? If yes-details	
12	Has the Organisation been successful in handing over projects/making projects sustainable? Give example	
13	Has the Organisation been blacklisted by government/PSU or any corporate? If yes, reasons for it	
14	Is the Organisation empanelled by any reputed institute or agency? If yes, give details	
15	Is the Organisation associated with any other corporate for implementing CSR projects? Mention names	
16	Total turnover in the last 3 financial years	



17	Strength of staff (number of full time employees)	
18	Any past projects with BPCL/other PSU's If yes then details thereof	
19	Qualification/experience of staff/project team	
20	Please provide two references of past funders of your projects (Email id/ Contact Person with Designation/ Contact Number)	
21	Have you filled all the information in the proposal?	

Form D

Summary Sheet for the Proposal	
Title of the project	
Project Description	(Write a brief description of project)
Name of Executing Organisation	
Address of Organisation (Registered address & address of branch from which proposal is given)	
Contact Person	
Contact Number & email address	



Experience of the Organisation	(Mention no. of years of experience & short brief about other projects executed)
Place of execution of project	
Reason for choice of place	
Tenure of the project	
Cost of the project (enclose a detailed budget)	
Funds requested from BPCL	
Funds requested from any other sources if any	
Objective of the project	
Reason of Organisation preferring BPCL to be part of this project	<i>(mention nearest BPCL Business unit, whether the proposal is in line with BPCL thrust area & justify why BPCL should consider the proposal)</i>
Benefits/Outcomes expected from the project	
Quantitative (Mention as per parameter suitable, but make sure to mention number of beneficiaries)	1. 2. 3. 4. 5.
Qualitative (parameters which are difficult to capture in numbers)	1. 2. 3.
Requirement of any approval from local bodies/government/municipality or any statutory body	Yes or No, If yes, give details in short
Whether similar projects executed earlier?	Yes or No, If yes, give details in short



In case the proposal is approved, the organisation is okay to open separate bank account for BPCL?
(Yes/No)

Information given above is true and we can provide the documentary proof of it in case of enquiry

(seal of the Organisation & signature of an authorised person from the Organisation)

Form E

Track Record of Projects

(Kindly mention projects undertaken in the last 3 years. If an organisation is existing for 3 years, track record from inception till date is required)

Sr. No.	Project Description	Focus Area	Location	Period (To - From)	Value in INR Lakhs	Number of Beneficiaries	Partner Name (Funding Agency)
1	Skilling unemployed youth	Skill Development	Mumbai	April 2015-2016	XYZ Lakhs	500	ABC
2							



3							
4							
5							
6							
7							
8							

Form F

Declaration

I / We hereby declare and certify that all the information given in the application form and in the documents submitted are true and correct to the best of my knowledge.

I / We acknowledge that in case of misrepresentation of information or furnishing of false information, my application is liable to be rejected and /or approved project is be liable to be terminated by BPCL at any stage.



I / We further declare and certify that our organisation / company / group of companies has / have not been blacklisted or been put on the holiday list by any of the Public Sector Undertakings in India or Statutory authority or Government.

Signature

Name.....

Designation.....

Seal of the Organisation.....

BPCL Format