

**(Technical Proposal - Open PDF file)**  
**(Financial Proposal - Password-Protected PDF file)**

## REQUEST FOR PROPOSAL

### Short-Term Consultant: Specialist - Fund Operations, Risk Management & Oversight

#### 1. Background

The Coalition for Disaster Resilient Infrastructure (CDRI) is a global coalition committed to strengthening infrastructure resilience against climate and disaster risks. With 57 member countries and 12 partner organizations, it includes national governments, international bodies, and businesses collaborating to exchange knowledge, drive research, and invest in disaster-resilient infrastructure. Members gain access to global expertise, funding, technical support, research opportunities, innovative solutions, and international best practices.

Headquartered in New Delhi, India, CDRI's Secretariat holds the status of an International Organization.

CDRI's mission is, by 2050, to drive US\$10 trillion of new and existing infrastructure investments and services to be resilient to natural hazards and climate change through enhanced capacity, informed policy, planning, and management, thereby improving environmental quality, livelihoods, and overall well-being for more than 3 billion people worldwide.

#### 2. Objective of this assignment

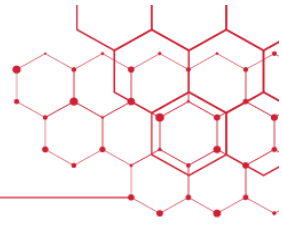
CDRI established a multi-donor trust fund, the Infrastructure Resilience Accelerator Fund (IRAF), in November 2022, hosted by the United Nations Multi-Partner Trust Fund Office (UN MPTFO) for a period of five years. As per the Terms of Reference of IRAF, the Fund will transition to the CDRI Secretariat in 2027. Considering the project cycle under IRAF, CDRI is required to establish and operationalise a CDRI-administered Trust Fund well ahead of the transfer date.

To support this transition, the Fund Management Unit (FMU) is responsible for supporting the implementation of the Fund mandate and the application of Fund policies across four core areas: programme design; programme implementation; Fund operations; and Fund portfolio oversight, monitoring and evaluation.

CDRI seeks to engage a Specialist – Fund Operations, Risk Management and Oversight to provide short-term technical and operational support to the Fund Management Unit, with a focus on operations, project management, risk analysis, due diligence, compliance, financial monitoring, reporting, and process development. The assignment is intended to support the design, build, and initial operationalisation of the CDRI-administered Fund

#### 3. Scope of Work

The consultant is expected to work on-site and will work closely with the designated team from CDRI. In executing this assignment, the consultant will undertake the following indicative (but not limited to) tasks:



## **A. Fund Design and Transition Support**

- Support implementation of the approved IRAF Fund transition strategy.
- Provide analytical and operational support in designing the CDRI Trust Fund architecture, governance arrangements, and management structures.
- Contribute to the drafting and finalisation of key strategic and operational documents, including Terms of Reference, governance rules and procedures, operational guidelines and templates, and Fund-related policies and frameworks.
- Support the development of systems, tools, templates, and workflows required to transition to a CDRI-administered Fund.

## **B. Fund Governance and Coordination**

- Support the functioning of Fund governance and management structures through research, data compilation, analysis, and documentation of meetings and action points.
- Prepare background materials, briefing notes, presentations, and reporting packs for Fund-related meetings and decision-making processes.
- Support communication and reporting related to the Fund and its governance structures, including coordination with internal teams, donors, and implementing partners.
- Track and follow up on actions arising from governance and management meetings

## **C. Fund Operations and Programme Implementation**

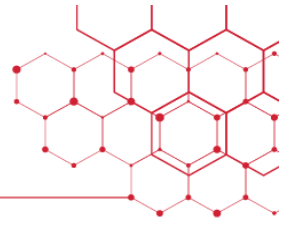
- Support the operationalisation of the Fund for programme and project implementation.
- Contribute to the development and refinement of grants documentation, Project Operations Manual, agreements with donors and implementing partners, and Fund tools, templates, and standard formats.
- Support implementation processes related to grants and projects, including due diligence, compliance checks, documentation review, and risk screening.
- Work closely with Operations and relevant internal teams on legal and administrative instruments necessary to receive donor funds and disburse resources for programme activities, ensuring appropriate safeguards.
- Support procurement processes for Fund-related activities, including coordination on contracting and monitoring delivery of services, as required.

## **D. Risk Management, Due Diligence and Fund Oversight**

- Support the establishment and maintenance of a Fund Risk Register, including identification, assessment, monitoring, and mitigation of operational and programmatic risks.
- Conduct or support due diligence and appraisal of implementing entities, partners, and programme opportunities using relevant methodologies and tools.
- Track and analyse risks affecting implementation, compliance, delivery, and portfolio performance, and support timely mitigation actions.
- Contribute to Fund oversight processes, including risk reporting, issue escalation, and related oversight actions as required.
- Support internal and external audit processes and follow up on related recommendations.

## **E. Financial Monitoring, Reporting and Compliance**

- Support Fund financial monitoring and reporting to CDRI management and donors.



- Assist in the review of budgets, expenditures, financial trends, and supporting documentation to ensure sound financial management.
- Contribute to budget tracking, work planning, and resource monitoring.
- Support preparation of financial analysis and reports for both technical and non-technical audiences.
- Support adherence to donor requirements and relevant CDRI policies, procedures, and compliance obligations.

#### **F. Policies, Processes, Systems and Capacity Building**

- Support the adaptation and development of CDRI policies, processes, procedures, and standard operating procedures for Fund administration and transition.
- Provide inputs to update and strengthen the Fund Manual of Operations and related guidance materials.
- Support the establishment and maintenance of secure information management and archiving systems for Fund-related records.
- Serve as a resource for Secretariat staff, grantees, and implementing organizations on Fund policies, templates, systems, and reporting requirements.
- Support alignment of internal procurement, HR, finance, and operational systems with donor and external compliance requirements.
- Design and organise training materials, briefing packages, and capacity-building support for programme teams, project teams, and relevant stakeholders.

#### **4. Key Deliverables**

The consultant is expected to produce the following deliverables over the course of the assignment in consultation with the line manager

##### **Deliverable 1: Inception Note and Work Plan (within 2 weeks of commencement)**

- Brief inception note outlining understanding of the assignment.
- Detailed 6-month work plan with proposed sequencing of tasks and outputs agreed with supervisor.
- Initial mapping of priority workstreams for Fund transition and operationalisation.

##### **Deliverable 2: Fund Design and Governance Support**

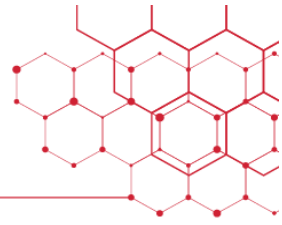
- Draft/final inputs to Fund architecture, governance arrangements, and management documentation.
- Drafts or revisions to core governance/process documents, as assigned.
- Regular meeting briefs, governance notes, minutes, and action trackers.

##### **Deliverable 3: Fund Operations and Process Development**

- Draft/refined operational tools, templates, and workflows.
- Inputs to grants documentation, partner/donor agreement templates, and/or Project Operations Manual.
- Process notes and implementation support documentation.

##### **Deliverable 4: Risk, Due Diligence and Compliance**

- Functional Fund Risk Register established or updated.



- Due diligence and appraisal tools/checklists and summary assessments, as required.
- Compliance/risk tracking notes and recommended mitigation actions.
- Completed Project Risk Assessment and Escalation Matrices, populated in consultation with programme and operational staff.

#### **Deliverable 5: Capacity Building, Systems and End-of-Assignment Report and Handover (by end of Month 6)**

- Inputs to SOPs, Fund Manual of Operations, and related guidance materials.
- Information management/archiving structure or recommendations.
- Training/briefing materials for internal teams and stakeholders.
- End-of-assignment report summarising work completed, status of key workstreams, risks/issues, and recommended next steps.

*\*The above deliverables are indicative and may be refined at the contract finalisation stage in consultation with the selected consultant and supervising officer.*

### **5. Timeframe**

- **Start Date:** The assignment is expected to commence in **August 2026**.
- **Completion Date:** The assignment should be completed by **January 2027**.
- **Duration:** 6 months (with possible 6-month extension subject to satisfactory performance, organizational requirements, and mutual agreement). Please note that this position is being advertised as a **maternity cover** for an existing fixed-term position at CDRI. Accordingly, the engagement is temporary in nature and is linked to the duration of the incumbent staff member's leave and CDRI's operational requirements.
- **Duty Station:** New Delhi, India

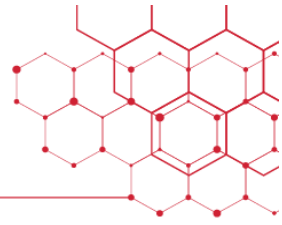
### **6. Qualifications and Experience of the Consultant**

#### **a. Educational Criteria:**

The consultant should have an advanced university degree in Business Administration, Public Administration, Finance, Economics, Development Studies, Public Policy, Risk Management, Project Management, or a related field. A first-level university degree in a relevant discipline, together with additional relevant experience, may be considered in lieu of an advanced degree.

#### **b. Experience Criteria:**

- 5 to 8 or more years of relevant professional experience in fund management, programme/project management, or development project implementation and administration.
- Strong background in operations and project management, including coordination of multiple processes and stakeholders.
- Strong analytical and data skills, including the ability to interpret financial, operational, and programme information and translate it into actionable insights.
- Demonstrated experience in developing SOPs, policies, procedures, tools, templates, and operational guidance materials.
- Proven experience in risk management, due diligence, partner/project appraisal, and compliance oversight.



- Experience supporting donor or regulatory compliance, reporting, and implementation requirements.
- Experience in financial monitoring, budget management, reporting, and audit support.
- Experience with trust funds, pooled funding mechanisms, grants management, or development project financing is highly desirable.
- Excellent written and verbal communication, drafting, and documentation skills.
- Experience working in a multilateral, international development, public sector, or similarly complex institutional environment is desirable.
- Experience in procurement and/or contract management is an advantage.

**c. Core Competencies:**

- Strong project and operations management capability.
- Strong analytical, problem-solving, and systems thinking skills.
- Ability to manage multiple priorities and ensure timely delivery under tight timelines.
- Strong coordination and stakeholder management skills.
- Ability to develop and improve policies, SOPs, tools, templates, and operational guidance.
- Excellent drafting, reporting, and documentation ability.
- Ability to communicate complex operational and financial matters clearly and effectively.
- Ability to work effectively in multicultural and multidisciplinary teams.
- High level of professionalism, integrity, and attention to detail.

**d. Language:**

- Excellent command of written and spoken English is required.
- Knowledge of additional languages would be an asset.

## 7. Confidentiality & Intellectual Property

All information accessed during the engagement shall be treated as strictly confidential. The consultant shall not disclose organizational data, processes, or findings to any third party without prior written approval. All deliverables, documentation, and artefacts produced during the assignment will remain the sole property of CDRI.

## 8. Reporting

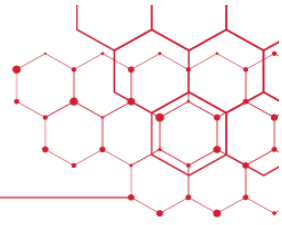
The consultant will report to the Lead Specialist – Fund Management and will work in close coordination with the Fund Management Unit and relevant Secretariat teams, including Operations, Partnerships, Finance, HR, and other internal stakeholders as required.

## 9. Submission

Please share proposals in **two separate PDF files:**

a) **Technical Proposal (Open PDF file)** catering to, but not limited to, the following:

- Technical Summary Sheet:** Use the template in **Annexure I** to state: (i) a brief understanding of the TOR and the IRAF transition context; (ii) your approach to fund operationalisation and transition support, risk management and due diligence, financial monitoring and compliance, and process and SOP development; (iii) relevant experience in fund management, programme



operations, risk oversight, or development project administration (max 5 lines); (iv) availability for this consultancy.

- ii. **Curriculum Vitae (CV required):** The detailed CV should clearly cover total years of experience, covering the criteria mentioned at Section 6 and highlight any experience with international or UN-system organisations.

**Note: A CV without the Technical Summary Sheet will be non-responsive.**

- b) **Financial Proposal (Password-Protected PDF File):** Use the template in **Annexure II** to provide the monthly professional fee (INR), inclusive of GST and the 6-month total fees. This should also include the bank details for payment.

**Notes:**

- **The Technical and Financial Proposals must be submitted as separate files, and no financial information should be disclosed in the Technical Proposal. Non-compliance will lead to disqualification.**
- **The Financial Proposal PDF must be password-protected. Under no circumstances should the password be shared at the time of submission. It will be requested separately after the RFP submission deadline has passed. (password requested only from technically qualified consultants).**

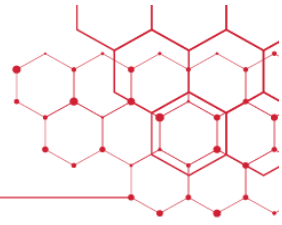
**10. Clarifications by Consultants**

- Any clarification/queries on the RFP document may be sent to the Procurement Unit of CDRI in writing by email to [tender.projects@cdri.world](mailto:tender.projects@cdri.world)
- CDRI shall endeavour to respond to the queries raised or clarifications sought by the consultant. However, CDRI reserves the right not to respond to any query or provide any clarification in its sole discretion, and nothing in this clause shall be construed, taken, or read as compelling or requiring CDRI to respond to any query or to provide any clarification.
- At any time prior to the proposal due date, CDRI may, for any reason, whether at its own initiative or in response to clarifications requested by the consultant(s), modify the RFP document by way of issue of Addendum/ Corrigendum/ Clarifications. Any Addendum/ Corrigendum/ Clarification thus issued shall be shared with all consultants by email and/or uploaded on the website of CDRI (<https://cdri.world/work-with-us/#tenders>) and shall be binding on the consultant and shall form part of the RFP document.

**11. Evaluation**

- i. The consultant will be selected using the **Quality-Cum-Cost Based Selection (QCBS)** method.
- ii. Proposals shall be evaluated as follows: Evaluation Criteria for Technical proposals 100 points:

S. N.	Technical Evaluation Criteria	Points	Evaluation Method
1.	Understanding of the TOR	20	Rating multiplier based
2.	Approach and Methodology	30	Rating multiplier based
3.	Education Qualification	10	Direct scoring
4.	Relevant Experience	40	Direct scoring
<b>Total Points</b>		<b>100</b>	



**CDRI may invite shortlisted candidates for an interview and/or brief presentation to confirm their understanding of the TOR, proposed approach and work plan, relevant experience, timeline, and availability (in person or virtual).**

Rating Multiplier	
Level of Responsiveness	Rating
Non-Responsive	0%
Poor	25%
Satisfactory	50%
Good	75%
Very Good	90%
Excellent	100%

iii. The consultant scoring 70% or above in the technical evaluation shall be considered for financial evaluation. 75% weightage will be awarded for the Technical Proposal, and 25% weightage will be awarded for the Financial Proposal. Technical Bids will be assigned a technical score (Ts) out of a maximum of 100 points.

iv. The consultant’s Financial Scores (Fn) are normalised as per the formula below:

- Fn = (Fmin/Fb) \* 100 (rounded off to 4 decimal places) where,
- Fn = Normalised commercial score for the consultant under consideration
- Fb = Absolute financial quote for the consultant under consideration
- Fmin = Minimum absolute financial quote

The formula for final evaluation: **Composite Score (S) = Ts \* 0.75 + Fn \* 0.25**

The consultant with the highest Composite Score (S) will be considered for the award of the contract and will be called for negotiations if required.

## 12. Standards of quality

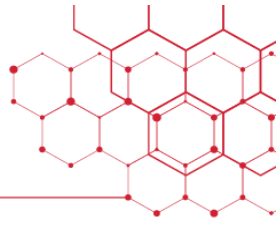
All outputs and data must meet CDRI policy, programme requirements, and professional standards for accuracy, confidentiality, timeliness and auditability.

## 13. Other Terms & Conditions

- The proposals should be valid for 90 days after the final submission date.
- CDRI reserves the right to cancel this Request for Proposal before or after the receipt of proposals or after opening the proposal and call for fresh proposals. CDRI also has the right to reject any proposal without assigning any reason.
- Proposals incomplete in any respect will not be considered.

**The consultants are requested to submit their proposal through email to [tender.projects@cdri.world](mailto:tender.projects@cdri.world) by 23:59 hrs (IST) on Tuesday, 30 June 2026.** Responses received after the stipulated time or not in accordance will be summarily rejected.

**Please ensure that your proposal is sent ONLY to the ABOVE-MENTIONED email ID before the closing date & time. Proposals sent/copied to any other email ID (other than above) OR received after the bid closing date & time (mentioned above) will not be accepted.**



**ANNEXURE I: TECHNICAL SUMMARY SHEET (MANDATORY)**  
*(This must be accompanied by an updated consultant CV)*

**Full Name:** \_\_\_\_\_

**Email / Phone:** \_\_\_\_\_

**Earliest Start Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_ **Availability (hrs/week):** \_\_\_\_\_

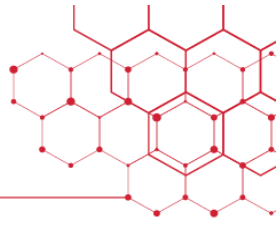
**A. Understanding of the TOR (max 5 lines)**

Briefly state your understanding of the IRAF transition context and the key areas you will prioritise during the six-month assignment.

**B. Approach and Methodology (max 5-7 lines)**

Briefly describe your approach to:

- Fund operationalisation and transition support
- Risk management and due diligence
- Financial monitoring and compliance
- Process and SOP development



**C. Relevant Experience (max 5 lines)**

**Kindly share a link to similar work undertaken, if available.**

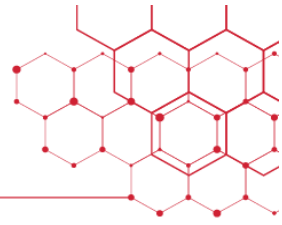
Highlight 2 to 3 assignments in fund management, programme operations, risk oversight, or development project administration.

**Declaration:** I confirm that this Technical Summary Sheet precedes my CV and that no pricing is included in my Technical Proposal.

**Signature:** \_\_\_\_\_ **Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

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**Notes for consultants:** Keep this to two pages. The CV (3-5 pages) follows this sheet and must include two referees.



**ANNEXURE II: FINANCIAL PROPOSAL TEMPLATE (MANDATORY)**

**RFP Title:** Short-Term Consultant - Specialist, Fund Operations, Risk Management and Oversight

**Full Name:** \_\_\_\_\_

**GSTIN (If registered):** \_\_\_\_\_

**PAN:** \_\_\_\_\_

**1. PRICING (INR)**

Item	Unit	Qty	Unit Rate (INR)	Amount (INR)
Professional fee (monthly)	Month	6		
<b>Subtotal (6 months)</b>				
GST (if applicable)	%			
<b>Total Contract Price (6 months)</b>				

**2. BANK DETAILS**

Account Name:	
Name of the Bank:	
Branch Address:	
Account No.:	
IFSC/ SWIFT:	

**Declaration:** I confirm that no pricing appears in my Technical Proposal and that the above rates are applicable for the entire duration of the contract period.

**Signature:** \_\_\_\_\_ **Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_