



Request for Proposal (RFP)
Hands-on Training Program
on
Agentic AI
29th September 2025

Dear Concerned,

Subject: Request for Proposal – Design, content development and pilot implementation of Hands-on Certificate Program on Agentic AI

The pace with which the digital transformation is impacting different professions including accounting and auditing profession has necessitated finance professionals to upscale their skillsets as per modern digital world. In this regard, the Institute, through its Digital Assurance and Accounting Board (DAAB), proposes for launching of Certificate Programs in technology and relevant areas in collaboration with reputable individuals or parties having substantial experience in the field.

The Institute invites proposals from qualified training providers for the design and delivery of a specialized training program on Agentic AI tailored for finance professionals. With the rapid evolution of artificial intelligence, finance functions are transitioning from traditional roles to strategic, technology-driven decision-making. This program aims to equip finance leaders and practitioners with the knowledge and practical skills to leverage agentic AI for automation, predictive insights, risk management, and enhanced governance.

The primary objective of this program is to:

- Equip finance professionals with **practical knowledge** of agentic AI concepts, frameworks, and tools.
- Demonstrate **real-world applications** of agentic AI in finance, including automation, forecasting, reporting, and compliance.
- Provide **hands-on experience** in building, deploying, and interacting with AI agents.
- Strengthen awareness of **risk, governance, and ethical considerations** in AI adoption.
- Enable participants to apply agentic AI to drive **strategic decision-making and digital transformation** within their organizations.

The selected provider will be responsible for developing a comprehensive, industry-relevant curriculum that bridges cutting-edge AI capabilities with the unique requirements of the finance profession.

Request for Proposal (RFP) is being invited keeping in view the following scope and timelines.

A. Scope

The Program aims to build a firm foundation and operational-level skills for chartered accountants to take up an expert-level course on Agentic AI. The course will be designed to equip finance professionals with the knowledge, tools, and practical applications of **Agentic AI** in the evolving business landscape.

The Course

1. Develop and design training modules including learning outcomes reflecting current trends and practices including but not limited to

- a. Foundations of Agentic AI
- b. Mastering Tools and Technologies such as: Machine Learning, Natural Language Processing (NLP), and Reinforcement Learning, Large Language Models (LLMs) and agent frameworks (LangChain, AutoGPT, Copilot, etc.)
- c. Applications in Finance: Automated reporting, real-time insights & decision support
- d. **AP Automation:** Zero-touch invoice handling & approval workflows
- e. Agentic AI for data interpretation and insights
- f. Integration with ERP, CRM, and financial systems
- g. Risk, Ethics, and Governance
- h. Building and deploying simple AI agents
- i. Case-based projects using finance data
- j. Experimentation with agentic AI platforms and tools

2. Identify training pre-requisites, completion requirements and minimum knowledge competency areas.

3. Proposed credit hours (Minimum 42 hours + 2 hours practice session), duration of training program and in-person and online parts of each module.

4. Develop learning materials, Slide deck, Student Guide and teaching aids with appropriate case studies.

5. Develop reliable and valid assessment papers, milestones and certification requirements.

6. Propose weightage and sample paper for assessment marking of the assessment.

7. Development of practice material, home assignments and case studies.

8. Prepare topic wise Question Data Bank (Minimum 200 questions MCQ's).

Implementation

1. Supervise certification program offered by ICAP as pilot program. This includes providing faculty on cost plus basis.

2. Service Provider shall be responsible to provide the access to software/tools being used in the program, to each participant of the program.

3. Incorporate appropriate changes based on experience gained in pilot offer.
4. Conduct and correction of assessments.
5. Institute intends to offer the course via learning management system, after the first year of implementation of the cohort(s).

Timelines

Suggest timelines of each component of the project.

Costs Break and Payment Schedule

The Costs should be broken up as per the following deliverables (Annexure B):

1. Development and designing of training modules.
2. Develop learning materials, Slide deck, Student Guide and teaching aids with appropriate case studies.
3. Develop reliable and valid assessment papers, milestones and certification requirements.
4. Propose weightage and sample paper for assessment marking of the assessment.
5. Development of practice material, home assignments and case studies.
6. Preparation topic wise Question Data Bank (Minimum 200 questions MCQ's).

Eligibility Criteria

A Prospective Bidder for the Assignment may be an individual / sole proprietor, or an organization duly registered under the applicable, permitted and relevant laws & procedures.

The criteria for Prospective Bidders to be eligible to undertake the Assignment has been provided underneath.

1. Bidder to submit

- i. High Level Learning Outcomes and Syllabus.
- ii. Short video of trainer on Agentic AI (minimum 2 trainers clip not exceeding 2 minutes).
- iii. Resume and Profile of the trainers.

2. It is preferred that the Trainers are ICAP Chartered Accountants, or must be from a finance background and have a qualification in accounting and finance from a professional body, possessing relevant Certifications specialized in the field of AI for the conduct of the course.

3. Trainers should have at least 3 years corporate sector experience.

4. The Bidder must have demonstrated experience of at least 3 years in the area of developing and /or delivering courses related to data analytics.

5. The Bidder must possess valid registration from income tax Authority (i.e., the NTN certificate) and relevant sales tax Authority, if applicable.

B. Intellectual property

1. The Developer shall grant free of charge perpetual right to use the intellectual property created in this project to ICAP.
2. The developed material to be handed over to Institute of Chartered Accountants of Pakistan before the completion of the project.
3. The Developer or its trainers will not use this program its content or material to run any new or similar programs.

C. Technical Bid Documents

Each Bidder shall submit a technical proposal (the "Technical Bid") by completing the following documents (collectively, the "Technical Documents") Proposal shall not be considered in absence of the required:

Part	Description	Relevant Annexure
Part I	High Level Learning Outcomes and Syllabus	Annexure - 1
Part I (a)	Short video of trainer on Agentic AI (minimum 2 trainers clip not exceeding 2 minutes.	Annexure –1
Part II	Application Form	Annexure – 2
Part III	Basic Information Form	Annexure – 3
Part IV	Bidder's Experience Form	Annexure – 4
Part V	Team Composition and Task Assignments	Annexure – 5
Part VI	CVs for proposed Professional Staff	Annexure – 6

D. Submission Timeline:

Submission of RFP	October 30 th , 2025
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E. Important Notice

1. This RFP does not obligate the Institute to pay any costs incurred by respondents in the preparation and submission of the RFP.
2. The charges shall be paid as per mutually agreed terms and after deduction of due taxes.
3. There shall be no other charges, fee and reimbursement of out-of-pocket expenses to be payable by the Institute.
4. ICAP reserves the right to select any or all of the deliverables or reject or cancel the tendering process.

F. Confidentiality

Kindly treat the correspondence on the subject as strictly confidential. The individuals or parties must ensure that the course design, content development and pilot implementation exercise would be undertaken with absolute fiduciary trust and confidentiality.

Individuals or parties are not authorized to identify themselves as content developers or partners at any forum, including their CVs.

TECHNICAL BID DOCUMENTS

ANNEXURE 1: BID DATA SHEET

The following Bid-specific data shall supplement the provisions in the RFP document.

No.	Title	Details
1.	Name of the Assignment	Development of Hands-on Training Program on Agentic AI
2.	Address and Contact Person of the Procuring Agency	Name: Shumaila Maqbool Designation: Manager Address: The Institute of Chartered Accountants of Pakistan (ICAP), Chartered Accountants Avenue, Clifton Block 8, Karachi - 75600 Telephone: (021) 111-000-422 Ext: 302 Email: procurement@icap.org.pk
3.	Method of Selection	Single Stage Two Envelop Procedure Quality and Cost based Selection Method <i>Financial Proposal is to be submitted together with Technical Proposal.</i>
4.	Address for Submission of Bids	The Institute of Chartered Accountants of Pakistan (ICAP), Chartered Accountants Avenue, Clifton Block 8, Karachi – 75600
5.	Number of Copies of Bids	One hard copy and corresponding soft copy. Each Bidder shall submit the following documents in two separate, sealed envelopes (together, the "Bid"): a) Technical Bid b) Financial Bid These two envelopes, in turn, shall be sealed in an outer envelope. The envelope shall also say: "DO NOT OPEN, EXCEPT IN PRESENCE OF THE PROCUREMENT COMMITTEE" . Each USB drive shall be submitted together with the ORIGINAL printed Bids in the same sealed envelopes: a) The USB drive containing the Bidders' Technical Bid should be included in the Technical Bid Envelope and should not contain any elements of the Financial Bid. b) The USB drive containing the Bidders' Financial Bid should be included in the Financial Bid Envelope.
6.	Bid Submission Deadline	October 30th, 2025
7.	Proposal Validity Period	90 days
8.	Language of the Bid	English

ANNEXURE 2: APPLICATION FORM

[ON THE LETTERHEAD OF THE BIDDER]

To,

The Institute of Chartered Accountants of Pakistan The Chartered
Accountants Avenue,
Clifton, Karachi - 75600

Re: Request for Proposal – Design, content development and pilot implementation of Hands-on Certificate Program on Agentic AI

[DATE]

Dear Madam/Sir,

Re: Submission of Bid for Hands-on Course on Request for Proposal Design, Content Development, and Pilot Implementation of Hands-on Certificate Program on Agentic AI

We, the undersigned, offer to render our services for the above-mentioned project in accordance with your Request for Proposal dated [(insert date)], and our Bid submitted herewith. We are hereby submitting our Bid, which includes this Technical Proposal and a Financial Proposal sealed under separate envelopes.

We hereby declare that all the information and statements made in this Bid are true and accept that any misrepresentation contained herein may lead to our disqualification. It is hereby confirmed that our bid is valid for 90 days from the date of bid submission deadline. We understand you are not bound to accept any Proposal you receive.

[Signature]

In the capacity of [Position]

Authorized to sign this Application Form of [Name of Bidder]

ANNEXURE 3: BASIC INFORMATION FORM

[ON THE LETTERHEAD OF THE BIDDER]

PROSPECTIVE BIDDER INFORMATION:

Name:

Type: (Corporation, Partnership, Sole proprietorship etc.) Company/Entity

incorporation/registration no:

Date of establishment:

Address of principal / registered office: Telephone number:

Fax number:

E-mail address:

Primary areas of business:

ANNEXURE 4: BIDDER'S EXPERIENCE FORM

[ON THE LETTERHEAD OF THE BIDDER]

The Prospective Bidder is required to provide sufficient detail pertaining to its experience in the format given below.

Assignment name:	
Duration of assignment (months):	
Name of the procuring agency	
Address of the procuring agency:	
Narrative description of Project:	

ANNEXURE 5: TEAM COMPOSITION AND TASK ASSIGNMENTS

Proposed Professional Staff for the Assignment:

S.No.	Name of Staff	Area of Expertise	Position assigned / to be assigned	Tasks to be assigned under the Assignment
1.				
2.				
3.				
n.				

ANNEXURE 6: CURRICULUM VITAE (CV) FOR PROPOSED PROFESSIONAL STAFF

Key professional staff qualifications and competence for the Assignment:

- The Bidders are required to provide comprehensive job descriptions for the proposed professional staff on the format given underneath.
- Proposed staff having experience of local culture and environment is desirable.

Curriculum Vitae (CV), strengths and expertise of key staff members

1. Name of Bidder [Insert name of Bidder proposing the staff]:	
2. Name of Staff [Insert full name]:	
3. Date of Birth:	Nationality:
4. Education [Indicate complete details of college/university and other specialized education of staff member, giving names of institutions, degrees obtained, and dates of degree completion]:	
5. Membership of Professional Associations:	
6. Training Received:	
7. Countries of Work Experience: [List countries where staff has worked in the last 3 years]:	
8. Employment Record [Starting with present position, list in reverse order every employment held by staff member (see format here below), dates of employment, name of employing organization, positions held.]	
From [Year]: _____ To [Year]: _____ Employer: _____	
Positions held: _____	
9. List of all tasks assigned to this proposed staff member under the Assignment for which the Bid is being submitted	

Note: Please use as many copies of the above CV format as required to cover all the proposed staff members. It is reiterated that the CVs of the proposed staff must be submitted on the above format.

FINANCIAL BID DOCUMENTS

ANNEXURE 7: BID PRICE

(To be included in the Financial Envelope)

[ON THE LETTERHEAD OF THE BIDDER]

		Name of Assignment: Development of Hands-on Training Program On Agentic AI Date of RFP issue: September 29 th , 2025 Bid Submission Deadline: October 30 th , 2025
No.	Activity Description	Expected Cost in PKR
1.	Development and designing of training modules.	
2.	Develop learning materials, Slide deck, Student Guide and teaching aids with appropriate case studies.	
3.	Develop reliable and valid assessment papers, milestones and certification requirements.	
4.	Propose weightage and sample paper for assessment marking of the assessment.	
5.	Development of practice material, home assignments and case studies.	
6.	Preparation topic wise Question Data Bank (Minimum 200 questions MCQ's).	

Note: Bidders are required to provide the break-up of Bid Price on the format given above.