



TERMS OF REFERENCE (ToR) and REQUEST FOR PROPOSALS (RFP)

**Design, Configuration, Implementation, Data Migration, Training,
and Support of an Enterprise Resource Planning (ERP) System for
the Africa Minigrid Developers Association (AMDA)**

1. INTRODUCTION

1.1. About AMDA

AMDA is the pan-African industry association representing private sector minigrid developers and allied partners, working to make Africa's minigrid market investable, scalable, and central to achieving universal energy access. As the unified and credible voice of the sector, AMDA advances the policy, regulatory, and financial conditions required to support sustainable market growth.

Through authoritative sector intelligence, targeted policy engagement, structured mobilisation of private capital, and high-impact convening across the energy, finance, and productive use ecosystems, AMDA accelerates developers' pathways to scale and positions minigrids as a critical driver of Africa's electrification, economic growth, and broader development objectives.

As of July 2026, AMDA represents 72 member companies with operations spanning 30 countries across all 5 regions of Africa.

2. PURPOSE OF THE ASSIGNMENT

AMDA invites qualified ERP implementation firms to submit proposals for the provision, configuration, customization, implementation, training, support, and maintenance of an integrated ERP solution.

The selected solution shall:

- ⦿ Automate organizational processes
- ⦿ Improve financial accountability and governance
- ⦿ Strengthen internal controls
- ⦿ Improve reporting and decision-making
- ⦿ Support donor-funded program management
- ⦿ Eliminate fragmented spreadsheets and standalone applications
- ⦿ Provide a secure and scalable digital platform
- ⦿ Integrate business functions into a single source of truth
- ⦿ Support future organizational growth

The proposed ERP should preferably be a mature, commercially proven, cloud-based solution requiring minimal custom software development and capable of supporting future expansion.

3. OBJECTIVES

The objectives of this assignment are to:

3.1. Strategic Objectives

- ⦿ Improve organizational effectiveness and productivity
- ⦿ Enhance transparency and accountability
- ⦿ Strengthen grant and project management
- ⦿ Improve organizational reporting and analytics
- ⦿ Ensure compliance with donor, statutory, and governance requirements

3.2. Operational Objectives

- ⦿ Standardize workflows across departments
- ⦿ Digitize approval processes

- ◉ Improve data quality and integrity
- ◉ Reduce manual data entry
- ◉ Improve document management and auditability

3.3. Technical Objectives

- ◉ Establish a secure, scalable ERP platform.
- ◉ Integrate core business processes.
- ◉ Enable self-service functionality.
- ◉ Improve access to real-time organizational information.

4. CURRENT ENVIRONMENT

The current operating environment includes the following systems:

Function	Current Tool
Accounting	QuickBooks
Asset Register	Excel
Payroll	Excel
HR Records	HR Database
Project Management	Excel
Grants Tracking	Excel / QuickBooks

The implementation partner shall assess the current environment and develop an approved migration strategy for all relevant historical data.

5. Scope of Work

The implementation partner shall provide end-to-end ERP implementation services

5.1. Phase 1: Inception and Requirements Assessment

A) The consultant shall:

- ◉ Conduct stakeholder consultations.
- ◉ Review current operational processes.
- ◉ Document business requirements.
- ◉ Conduct business process mapping.
- ◉ Assess existing systems.
- ◉ Perform functional and technical gap analysis.
- ◉ Develop an implementation roadmap.

B) Deliverables:

- ◉ Inception Report
- ◉ Stakeholder Analysis
- ◉ Business Process Mapping Report
- ◉ Requirements Specification Document
- ◉ Gap Analysis Report

5.2. Phase 2: Solution Design

A) The consultant shall:

- ⦿ Configure system architecture.
- ⦿ Design organizational workflows.
- ⦿ Design approval hierarchies.
- ⦿ Define user roles and permissions.
- ⦿ Establish reporting structures.

B) Deliverables

- ⦿ Solution Design Document
- ⦿ Security Design Framework
- ⦿ Workflow Design Matrix
- ⦿ User Access Matrix

5.3. Phase 3: System Configuration and Customization

The selected vendor shall configure and deploy required modules.

6. ERP FUNCTIONAL REQUIREMENTS

6.1. Financial Management Module

Minimum requirements include:

A) General Ledger

- ⦿ Multi-fund accounting
- ⦿ Multi-grant accounting
- ⦿ Multi-currency management
- ⦿ Cost center accounting
- ⦿ Chart of accounts management

B) Budgeting

- ⦿ Annual budgeting
- ⦿ Budget revisions
- ⦿ Scenario planning
- ⦿ Commitment control
- ⦿ Budget variance analysis

C) Treasury Management

- ⦿ Cash management
- ⦿ Bank reconciliation
- ⦿ Bank account management

D) Accounts Payable

- ⦿ Vendor management
- ⦿ Invoice processing
- ⦿ Payment approvals
- ⦿ Payment scheduling

E) Accounts Receivable

- ⦿ Billing management
- ⦿ Automated invoicing

- ◉ Receipt management

F) Fixed Assets

- ◉ Asset registration
- ◉ Depreciation management
- ◉ Asset transfers
- ◉ Asset disposal

G) Reporting

- ◉ Balance Sheet
- ◉ Income Statement
- ◉ Trial Balance
- ◉ Cash Flow Statement
- ◉ Budget vs Actual Reports
- ◉ Grant Financial Reports
- ◉ Donor Reporting Templates

The original ToR identifies budgeting, general ledger, bank reconciliation, fixed assets, grant accounting, automated invoicing, and financial reporting requirements.

6.2. Human Resource Management

The system shall provide:

A) Employee Administration

- ◉ Employee database
- ◉ Position management
- ◉ Organizational structure management

B) Leave Management

- ◉ Annual leave
- ◉ Sick leave
- ◉ Study leave
- ◉ Compassionate leave
- ◉ Leave approval

C) Payroll

- ◉ Payroll processing
- ◉ Payroll reports
- ◉ Tax deductions
- ◉ Statutory deductions

D) Performance Management

- ◉ Goal setting
- ◉ Performance reviews
- ◉ Appraisal workflows

E) Learning and Development

- ◉ Training plans
- ◉ Training tracking
- ◉ Skills management

F) Self-Service Portal

Employees shall be able to:

- ⦿ Apply for leave
- ⦿ Submit travel requests
- ⦿ View payslips
- ⦿ Update personal information
- ⦿ Track approvals

The need for HR, payroll, leave, performance and training management is identified in the current ToR.

6.3. Procurement and Contract Management

The ERP shall support:

A) Procurement Planning

- ⦿ Procurement plans
- ⦿ Budget-linked requisitions

B) Purchasing

- ⦿ Purchase requisitions
- ⦿ Purchase orders
- ⦿ Comparative evaluations
- ⦿ Bid management

C) Supplier Management

- ⦿ Vendor registration
- ⦿ Vendor performance evaluation
- ⦿ Supplier database

D) Contracts

- ⦿ Contract repository
- ⦿ Contract lifecycle management
- ⦿ Contract reminders

Current requirements include purchasing, bid management, supplier management, and contract management.

6.4. Project and Grant Management

The ERP shall provide:

- ⦿ Donor management
- ⦿ Grant budgeting
- ⦿ Grant allocation
- ⦿ Activity planning
- ⦿ Workplan monitoring
- ⦿ Results tracking
- ⦿ Partner management
- ⦿ Contract management
- ⦿ Program reporting
- ⦿ Milestone tracking
- ⦿ Approval workflows

The original ToR requires grant allocation, partner management, reporting, contract management, and activity approval.

6.5. Asset Management

The solution shall support:

- ⦿ Asset registration
- ⦿ Barcode management
- ⦿ Asset movement tracking
- ⦿ Asset valuation
- ⦿ Depreciation tracking
- ⦿ Physical verification
- ⦿ Asset disposal management

6.6. Document Management

The ERP shall:

- ⦿ Store supporting documents.
- ⦿ Support document version control.
- ⦿ Maintain audit trails.
- ⦿ Provide secure access controls.
- ⦿ Enable document search functionality.

7. TECHNICAL REQUIREMENTS

The proposed ERP shall:

7.1. Architecture

- ⦿ Be cloud-hosted (preferred).
- ⦿ Support web-based access.
- ⦿ Support mobile access.

7.2. Availability

- ⦿ Minimum uptime of 99.5%.

7.3. Security

- ⦿ Multi-factor authentication.
- ⦿ Role-based access control.
- ⦿ Encryption at rest and in transit.
- ⦿ Audit logging.
- ⦿ Password policies.

7.4. Backup and Recovery

- ⦿ Daily automated backups.
- ⦿ Disaster recovery procedures.
- ⦿ Recovery point objective (RPO) and recovery time objective (RTO) to be proposed

7.1. Integration

The system should support integration with:

- ⦿ Microsoft 365
- ⦿ Outlook

- ⦿ Excel
- ⦿ Power BI
- ⦿ Banking platforms
- ⦿ Future third-party applications through APIs

8. DATA MIGRATION

8.1. The vendor shall:

- ⦿ Assess data quality.
- ⦿ Clean and validate data.
- ⦿ Develop migration templates.
- ⦿ Migrate historical records.
- ⦿ Reconcile migrated data.
- ⦿ Conduct migration testing.

8.2. Deliverables

- ⦿ Data Migration Strategy
- ⦿ Data Mapping Document
- ⦿ Data Validation Report
- ⦿ Data Reconciliation Report

9. CHANGE MANAGEMENT AND TRAINING

Vendors shall provide:

9.1. Change Management

- ⦿ Stakeholder engagement plan
- ⦿ Communication strategy
- ⦿ Adoption plan
- ⦿ Transition support

9.2. Training

- ⦿ Administrator training
- ⦿ Super-user training
- ⦿ End-user training

9.3. Documentation

- ⦿ User Manuals
- ⦿ System Administration Manual
- ⦿ Training Materials
- ⦿ Technical Documentation

Training and documentation requirements are already included in the current ToR.

10. TESTING AND ACCEPTANCE

10.1. The vendor shall conduct:

- ◉ Unit Testing
- ◉ Integration Testing
- ◉ User Acceptance Testing (UAT)
- ◉ Performance Testing
- ◉ Security Testing

AMDA shall sign off after successful UAT.

11. IMPLEMENTATION TIMELINE

Phase	Deliverable
Inception	Project Charter
Requirements Analysis	Business Requirements Report
Design	Solution Design
Configuration	ERP Modules
Migration	Data Migration
Testing	UAT Completion
Training	Training Completion Report
Go-Live	Go-Live Signoff
Support	Post-Implementation Report

Detailed schedules shall be proposed by bidders.

12. POST-IMPLEMENTATION SUPPORT

12.1. The vendor shall provide:

- ◉ Helpdesk support
- ◉ Bug fixes
- ◉ Security updates
- ◉ System enhancements
- ◉ User support

12.2. Minimum support period:

12 Months Post Go-Live

13. SERVICE LEVEL AGREEMENT (SLA)

Priority	Response Time	Resolution Target
Critical	4 Hours	24 Hours
High	8 Hours	48 Hours
Medium	24 Hours	5 Days
Low	48 Hours	10 Days

14. VENDOR QUALIFICATIONS

14.1. The vendor shall demonstrate:

- ⦿ Minimum 10 years ERP implementation experience.
- ⦿ Experience implementing ERP systems for NGOs, associations, development organizations, or donor-funded institutions.
- ⦿ Proven experience in ERP integration.
- ⦿ Qualified ERP consultants.
- ⦿ Project management expertise.
- ⦿ References from similar assignments.

The existing ToR specifies experience requirements, ERP implementation expertise and qualified personnel.

15. EVALUATION CRITERIA

Criteria	Weight
Technical Solution	30%
Methodology	15%
Relevant Experience	20%
Team Composition	15%
Support and Maintenance	10%
Financial Proposal	10%
Total	100%

Minimum technical threshold:
70 Points.

16. PROPOSAL SUBMISSION REQUIREMENTS

16.1. Technical proposal shall include:

- ⦿ Company profile
- ⦿ Methodology
- ⦿ Workplan
- ⦿ Team composition
- ⦿ Relevant references
- ⦿ Project approach
- ⦿ Risk management plan

16.2. Financial proposal shall include:

- ⦿ ERP licensing
- ⦿ Implementation fees
- ⦿ Training costs
- ⦿ Support costs
- ⦿ Taxes
- ⦿ Payment schedule

The current ToR requires technical and financial proposals, organizational profile, registration documents, tax documentation and team credentials.

17. DATA OWNERSHIP AND INTELLECTUAL PROPERTY

All organizational data generated, stored, migrated, processed, or maintained through the ERP system shall remain the sole property of AMDA.

AMDA shall retain unrestricted access to all business data and reports at all times.

18. CONFIDENTIALITY

The vendor shall maintain strict confidentiality regarding all AMDA information, systems, operations, records, personnel information, and financial information encountered during execution of the assignment. This requirement aligns with the confidentiality provisions already included in the existing ToR.

19. CONTRACT TERMINATION

AMDA reserves the right to terminate the contract for:

- ⦿ Material breach of contract.
- ⦿ Failure to meet agreed milestones.
- ⦿ Failure to meet quality standards.
- ⦿ Fraud, misconduct, or conflict of interest.

The current ToR provides for contract termination in the event of breach of obligations by the software company.

20. ANNEXES

Annex 1: Functional Requirements Matrix

Annex 2: Technical Compliance Matrix

Annex 3: Project Staffing Template

Annex 4: Financial Proposal Template

Annex 5: Vendor Reference Template

Annex 6: Acceptance Testing Criteria

Annex 7: Service Level Agreement Template

Annex 8: Risk Register Template

Annex 9: Data Migration Template

Annex 10: ERP Implementation Workplan Template

This version is structured to meet the standards typically used by international NGOs, donor-funded programs, development finance institutions, and professional procurement committees, while remaining aligned to the requirements already identified by AMDA.

DEADLINE OF SUBMISSION

The proposals are to be submitted in a soft copy to **Tenders@africamda.org** by **Thursday, 10th September**, at **4.00 p.m EAT** with the title **PROPOSAL FOR PROVISION OF AMDA ERP SYSTEM**.

Please note that late submissions will not be opened.



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