

Terms of Reference (TOR): Cloud Hosting, Migration and Support of the HRMS/Payroll System and QuickBooks

Tender Number:
GBM/PR/ERPQ/Oct/2026/002

1. Introduction

The Green Belt Movement (GBM) seeks to move two systems to a reliable, secure cloud environment: its HRMS/Payroll system (one application, called the ERP in this document) and its QuickBooks accounting system. The ERP runs today on an on-premises server, and the QuickBooks company file is held locally rather than on a server. GBM wants both hosted, backed up, protected and supported by a qualified cloud service provider, with remote access for authorised staff, at a cost a small NGO can carry.

Field	Detail
HRMS/Payroll system	HR Master by Endeavour Africa Ltd, a web-enabled (browser-based) application, is used for HRMS and payroll as one system. The version and database engine are provided to registered bidders on written request.
Application supplier	Endeavour Africa Ltd, Nairobi. GBM arranges the supplier's help with installation, licence re-activation and any upgrade, and the bidder coordinates with it.
Employee self-service	Where used, it is reached through the VPN.
ERP data	About 15 GB, growing about 2 GB a year
ERP users	2 user licences; HR and finance staff reach the system remotely through the VPN
QuickBooks	Desktop company file. Edition and version are provided to registered bidders on written request.
QuickBooks data	About 13 GB, growing about 1.8 to 2 GB a year; the local company file is to be consolidated during migration
QuickBooks users	Up to 10. Bidders price for 10 users
Where the systems are today	ERP on an on-premises server; QuickBooks held locally
Peak use	Monthly payroll run and month-end close
Remote access	Finance and HR staff need secure access from outside the office.
Hosting specification	GBM does not prescribe servers. Bidders propose and justify the hosting specification from the figures above.

Sizing basis. The workload, not the old server, sets the size. Annex A carries the data volumes forward over the contract term. Bidders size to those figures and show how capacity can grow without a second migration.

2. Objective

To engage a qualified cloud service provider to provide cloud hosting services only for GBM's existing HRMS/Payroll system (the ERP) and QuickBooks accounting system: hosting, securing, backing up and supporting them in the cloud, migrating all historical data, training key staff with a short written guide, and providing a managed service for an initial 12 months, renewable yearly for up to 36 months in total.

The HRMS/Payroll system and QuickBooks are one tender and one contract. GBM is not procuring new or alternative HR, payroll or accounting systems and is not changing the software it uses. A bid that proposes replacing either system, or substituting another, does not meet this Terms of Reference. No other system is

part of this tender. Optional items are priced separately (Section 7), and GBM chooses them after the award.

3. Scope of Work

The scope of work includes, but is not limited to, the items below. M means mandatory: a “No” disqualifies the bid. D means desirable and is scored.

3.1. Platform and Hosting

Provision of a scalable, secure cloud environment meeting the following requirements:

ID	Requirement	M/D
	Platform	
ERP-01	Host on a cloud platform that meets ERP-02 to ERP-14, such as Microsoft Azure or Amazon Web Services, or an equivalent platform, in a data centre in Kenya or in a region GBM approves in writing. The bidder names the platform, the region and the data centre's certifications (Tier III or equivalent) and prices it on the same template. Data stays in the stated region unless GBM approves a move in writing.	M
ERP-02	The bidder is an authorised partner or reseller of the platform it proposes or operates the platform itself, shown by a letter or certificate that names the platform.	M
ERP-03	Design: the bidder explains how the ERP and QuickBooks are hosted (shared or separate servers) and how each gets the sizing, security and backup below. Each is priced separately in Section 7.	M
ERP-04	Propose and justify compute, memory and storage for the data volumes and peak use in Section 1 and Annex A, covering three years of growth and backups with 30% headroom. Show how capacity can be increased without re-migration.	M
ERP-05	Monthly availability of at least 99.9% for production (about 44 minutes of downtime a month), excluding agreed maintenance windows (Section 3, part 5).	M
ERP-06	The bidder supplies and prices every platform licence it must provide (operating system, database, remote access, backup software) for the user numbers in Section 1. Application licences stay with GBM. The bidder confirms in writing that hosting GBM's QuickBooks edition on its platform is permitted under Intuit's licence terms (for example through Intuit's authorised hosting program) and states the licence arrangement.	M
ERP-07	The hosted platform runs a vendor-supported operating system (Windows Server 2022 or later). Moving the existing server as it is (lift and shift) is not acceptable. Before pricing, the bidder confirms that the ERP, its database engine and QuickBooks run on the target operating system and states any upgrade the application supplier (Endeavour Africa) must provide. The bidder confirms in writing that it has contacted the application supplier and that the proposed environment is supported.	M
	Backup, recovery and security	
ERP-08	Daily backups kept for 30 days; monthly backups kept for 12 months; one copy stored in a different location (region). A full copy of all data is also delivered each month to storage controlled by GBM, outside the hosting platform.	M
ERP-09	Recovery point of no more than 24 hours and recovery time of no more than 8 hours, written into a documented recovery procedure and proven by a restore test every quarter with the report sent to GBM.	M
ERP-10	Encryption in transit (TLS 1.2 or higher) and at rest (AES-256 or equivalent).	M
ERP-11	Access only through VPN or an IP allow-list tied to GBM's firewall. No public database ports. Multi-factor authentication and named accounts for all bidder administrators. No bidder access to payroll or finance data without GBM's written approval, and all such access logged. Employee self-service, if used, is reached through the same VPN. GBM holds an emergency administrator account and can export all its data at any time.	M
ERP-12	Operating system and database patching: critical patches within 7 days, others within 30 days, and flaws being actively exploited within 72 hours, with notice before any outage.	M
ERP-13	Security and activity logs kept 12 months and available to GBM on request.	M

ID	Requirement	M/D
ERP-14	Confirmation of compliance with the Kenya Data Protection Act, 2019, with the data residency (region) stated, and a signed data processing agreement covering employee, payroll and financial data.	M
	Optional items (priced on the rate card, not in the scored total)	
ERP-15	Optional extras, each priced on the rate card and not in the scored total: (a) a test (UAT) environment for upgrades and payroll checks; (b) disaster recovery by replication to a second region, with a yearly test (the baseline is the off-site backup copy in ERP-08 and the targets in ERP-09); (c) an annual vulnerability scan with a summary report.	D
ERP-16	ISO/IEC 27001 certification or equivalent, with evidence.	D
ERP-17	The bidder can run the environment inside a cloud subscription owned by GBM, so any non-profit grant credits can apply, with platform charges billed at cost and shown separately from the bidder's fees.	D

3.2. Migration and Setup

- Migration of the ERP and all historical data from the current server to the cloud.
- Migration of the QuickBooks company file, including consolidation of the local file, to the cloud.
- Configuration of user access, remote access and backup schedules.

ID	Requirement	M/D
ERP-18	Migration plan and execution, coordinated with the application supplier, covering data transfer, validation by GBM users, cutover outside payroll days and month-end close, and a tested rollback. The bidder commits to dates in its bid.	M

3.3. Testing and Optimization

- Testing to confirm full functionality, performance and data integrity before go-live.
- Optimization of the environment after go-live.

ID	Requirement	M/D
ERP-19	Testing before go-live: reconciliation of migrated data against the old system, a payroll run in parallel with the old system, user acceptance testing and performance checks, with GBM's written sign-off before cutover, followed by two weeks of close support after go-live.	M

3.4. Training

- Training of key GBM staff on the cloud platform, emphasising scalability, security and backup procedures.

ID	Requirement	M/D
ERP-20	Training for key GBM HR, finance and ICT staff on access, backup and restore, security and escalation. The bidder supplies a short written guide in English covering how to log in and use remote access, how to request or remove access, how a restore is requested and tested, and whom to call and when. Documentation of configuration, backup schedule and recovery procedures is handed over at go-live and updated after any change. A training report is provided. The application's own user manual remains the application supplier's responsibility.	M

3.5. Managed Service

Provision of a managed service plan that includes user management, access control and system monitoring, and ongoing technical support and maintenance:

ID	Requirement	M/D
ERP-21	A helpdesk Monday to Friday 8:00 to 17:00 EAT, and 24x7 cover for Severity 1 incidents, with the response times below.	M
ERP-22	A monthly service report covering uptime, incidents, backups and patches.	M

ID	Requirement	M/D
ERP-23	A named technical contact and a deputy, both based in Kenya.	M

Service levels. These are written into the contract.

Severity	Example	Response	Target fix or workaround
1. Critical	ERP or QuickBooks down	30 minutes, 24x7	
2. High	Major function degraded, many users affected	2 hours, business hours	
3. Medium	Single-user or minor issue	4 hours, business hours	
4. Request	Standard change or information request	1 business day	

Each bidder proposes its own target fix or workaround time for each severity level in its draft SLA, according to its capacity. The times in the successful bid are written into the contract and used for the service credits.

Service credits. If monthly availability falls below 99.9%, the bidder credits 5% of that month's fee for each 0.1 percentage point below it, up to 30%. Each missed Severity 1 response or fix time earns a credit of 2% of the monthly fee. Planned maintenance needs 5 business days' notice, falls outside payroll days and month-end close, and does not exceed 4 hours a month. Availability below 99% in any 2 months of a 6-month period lets GBM terminate without penalty.

3.6. Data Protection and Exit

Data protection. The bidder acts as a data processor under the Kenya Data Protection Act, 2019, signs a data processing agreement, and is registered with the Office of the Data Protection Commissioner where the Act requires. It processes data only on GBM's instructions, keeps GBM data separate from other clients, and tells GBM of any suspected breach without delay and within 24 hours at most. Payroll, finance and staff data are confidential.

ID	Requirement	M/D
ERP-24	On exit, within 14 days of a request the bidder returns all GBM data in an open, documented format (database backup plus export), supports the transition for up to 60 days at the contract rates, then securely deletes GBM data and issues a deletion certificate. After the first 12 months GBM can end the contract on 90 days' notice. No exit fee applies beyond what the bidder priced.	M

4. Deliverables

1. Fully functional HRMS/Payroll (ERP) and QuickBooks systems hosted in the cloud.
2. Documentation on system configuration, backup schedule and recovery procedures.
3. Training report and the written guide.
4. Monthly service performance reports.
5. Signed data processing agreement.
6. The written confirmations required in ERP-06 and ERP-07, and the platform partner letter.

5. Timeline

The project is expected to be completed within **6 weeks** from the date of contract signing, to be confirmed with bidders based on the proposed design:

- Requirement assessment and planning: 1 week
- Migration and configuration: 3 weeks
- Testing, parallel payroll run, optimization, and training: 2 weeks

Cutover is timed outside payroll days and month-end and year-end close. The contract runs for 12 months and is renewable yearly, on satisfactory performance, for up to 36 months in total.

6. Vendor Requirements

Interested vendors must meet the following criteria. A bid missing any item is rejected before technical evaluation (pass or fail).

1. Authorised partner, reseller or operator of the proposed platform, with a letter naming it (ERP-02).
2. Proven experience hosting ERP, HRMS, payroll or accounting systems: at least two clients in the last 3 years, each shown by a contract, LPO or completion letter. Experience in internet service provision alone does not count.
3. Three reference clients of similar size, preferably NGOs or similar organisations, with current contact names and numbers.
4. A Kenyan office and local support staff.
5. A named project lead and a deputy, with a short CV and a copy of their current cloud platform certificate. Certificates need no notarisation; GBM verifies them directly.
6. A technical proposal and a financial proposal that describe the same design, including backup, recovery and security features (ERP-08 to ERP-14).
7. Certificate of incorporation and CR12; valid KRA tax compliance certificate and current business permit; audited accounts or bank statements for the last 2 years.
8. A signed bidder declaration (Annex C), including the Bribery Act, 2016 and conflict-of-interest statements.

7. Budget

Vendors are required to submit a comprehensive quotation using the table below with no lines added, removed or renamed, so that bids can be compared. Prices are in Kenya shillings, excluding VAT, with VAT shown on the total line. Anything not priced is deemed included at no extra cost. Optional items are priced on the rate card, are left out of the total and the financial score, and are chosen by GBM after award. Bids are compared on the year 1 total (one-time charges plus 12 months of recurring charges). The year 2 and 3 prices are binding and are used for renewals.

Item	Type	Unit price (KES, excl. VAT)	Quantity, year 1	Year 1 total (KES)	Unit price, years 2 and 3 (KES)
Platform: production environment for the ERP (compute, memory, storage)	Monthly		12		

Item	Type	Unit price (KES, excl. VAT)	Quantity, year 1	Year 1 total (KES)	Unit price, years 2 and 3 (KES)
Platform: production environment for QuickBooks (write 0 if shared with the ERP)	Monthly		12		
Platform: backup and off-site copy	Monthly		12		
Platform licences (OS, database, remote access, QuickBooks hosting licences: list each)	Monthly		12		
Services: setup and migration of the ERP	One-time		1		
Services: setup and migration of QuickBooks	One-time		1		
Services: monitoring, patching, user management and support	Monthly		12		
Services: training and documentation	One-time		1		
Total, excluding VAT					
VAT					
Total, including VAT					

Rate card (not scored, but binding for the contract term). Bidders state their price for: the optional extras in ERP-15 (test environment per month, disaster recovery per month, annual vulnerability scan); each extra QuickBooks user per month; extra storage per 100 GB per month; extra vCPU or RAM; data transfer or bandwidth charges, if any; additional remote users; migration assistance at exit (per day); a day rate for any extra work, including ERP configuration or customisation (which is outside this scope); change requests beyond the included allowance; out-of-hours callout.

Commercial terms. All prices are in Kenya shillings and fixed for the first 12 months, including any platform charge the bidder pays in dollars. Renewal prices are the year 2 and year 3 figures in the price template, and any increase beyond them is capped at 5% or the annual inflation rate published by the Kenya National Bureau of Statistics for the month before the renewal notice, whichever is lower, with 90 days' notice. Payment is monthly or quarterly in arrears, within 30 days of a correct invoice and a service report. Confidentiality, anti-corruption and the donor compliance conditions that apply to GBM are part of the contract.

8. Submission Requirements

Submit one technical proposal and one separate financial proposal, each as a PDF in separate files (or sealed envelopes if submitted in print), together with the documents required in Section 6.

1. **Technical proposal, with no prices:** understanding of GBM's environment; the compliance matrix (Annex B) with a page reference for evidence on every line; the proposed platform and hosting specification, including backup, recovery and security features; the migration plan with a timeline; the support model and a draft SLA covering fault logging, severity levels, response times, escalation contacts and preventive maintenance; and the references. Keep it within 25 pages excluding annexes.
2. **Financial proposal:** the template in Section 7 and nothing else, describing the same design as the technical proposal.

Validity and rules. Bids stay valid for 90 days from the deadline. Late bids are not opened. GBM may ask a bidder to clarify, but not to change, its bid. Bid costs are the bidder's own. GBM may reject any bid above its available budget and may cancel the tender without liability.

9. Evaluation Criteria

Submissions are evaluated in three stages. The criteria and weights below are fixed when the tender is issued and are not changed after bids are opened.

1. **Preliminary check.** Mandatory documents in Section 6 and every M requirement in Section 3. Pass or fail.
2. **Technical score out of 100.** Bidders scoring below 70 are not opened financially.
3. **Financial score and award.** Financial proposals are opened only for bidders who passed stage 2.

Technical criterion	Marks
Relevant ERP and accounting hosting experience, and verified references	30
Compliance with the requirements, including desirable items	25
Support model and draft SLA (fault logging, severity levels, response times, escalation contacts, preventive maintenance)	15
Migration plan and timeline	10
Qualifications of the named team and certifications	10
Security, backup and data protection approach	10
Total	100

Experience marks go only to references that can be verified: a reference with no contract, LPO or completion letter scores zero, and experience in internet service provision does not count. The final mark is 60% technical and 40% financial.

$$\text{Final mark (out of 100)} = 0.6 \times \text{technical score} + \text{financial score}$$

The financial score is calculated from the year 1 total cost including VAT (Section 7):

$$\text{Financial score} = 40 \times (\text{lowest total cost} \div \text{bidder's total cost})$$

The bidder with the highest final mark wins; a tie goes to the higher technical score. GBM will call all references, and may ask shortlisted bidders for a demonstration. Evaluation is done by a panel of at least three GBM staff who sign a conflict-of-interest declaration, score independently on signed sheets, and then agree the result together. The scoring sheets are kept on file. All bidders are told the outcome in writing.

10. Contact Information

All inquiries should be addressed in writing to GBM Procurement Committee on this E-mail: procurement@greenbeltmovement.org no later than 16th October 2026 at 1700 hours. Any inquiry made past this date will not be responded to. Answers are shared with every bidder. Contact with other GBM staff about this tender may lead to disqualification

Tender applications including technical and financial proposals must be physically submitted in sealed envelopes no later than **30th October 2026 at 1700 hours**. The application must be clearly labeled and the tender number **GBM/PR/ERPQ/Oct/2026/002** indicated on the envelope, addressed to GBM Procurement Committee:

**The Procurement Committee,
The Green Belt Movement,
Adams Arcade, Kilimani Road, Off Elgeyo Marakwet Road
P.O BOX 67545-00200, Nairobi**

Note: Only inquiries are to be made through the E-mail and any full tender application sent through E-mail shall be rejected.

Key dates

Step	Date
Tender issued	9th October 2026
Last day for written clarification questions	16th October 2026
GBM answers circulated to all bidders	20th October 2026
Bid submission deadline, 1900Hrs EAT	30th October 2026
Shortlisted bidders' demonstrations	16th November 2026
Notification of award	17th November 2026

Who may bid. Registered Kenyan companies, or foreign companies with a registered Kenyan entity and local support staff, that meet the mandatory requirements in Section 6.

Annex A: Data volumes used for sizing

Item	Calculation	Result
ERP data today	Current figure	15 GB
ERP data after 3 years	15 GB + 3 × 2 GB a year	21 GB
QuickBooks data today	Current figure	13 GB
QuickBooks data after 3 years	13 GB + 3 × 2 GB a year (top of the 1.8 to 2 GB range)	19 GB
Combined data after 3 years	21 GB + 19 GB	40 GB
With 30% headroom (ERP-04)	40 GB × 1.3	52 GB
Availability (ERP-05)	0.1% of a 730-hour month	about 44 minutes of downtime a month

Backup storage is sized separately by the bidder from the schedule in ERP-08. These are data volumes, not server specifications: GBM's current server also runs other systems, so its size says nothing about what these two systems need. If GBM's data volumes or user numbers change, the sizing changes with them.

Annex B: Compliance matrix

Bidders copy every requirement row from Section 3 and add the columns below. "Partial" or "No" on an M item disqualifies the bid. Evidence must be a page or document reference, not a restatement of the requirement.

ID	Requirement	Product name and model (platform)	Comply (Yes / Partial / No)	How it is met	Evidence (document, page)
ERP-01	Host on a cloud platform that meets ERP-02 to ERP-14, such as Microsoft Azure or Amazon Web				

ID	Requirement	Product name and model (platform)	Comply (Yes / Partial / No)	How it is met	Evidence (document, page)
	Services, or an equivalent platform, in a data centre in Kenya or in a region GBM approves in writing. The bidder names the platform, the region and the data centre's certifications (Tier III or equivalent) and prices it on the same template. Data stays in the stated region unless GBM approves a move in writing.				

Annex C: Bidder declaration

To be signed by an authorised signatory on company letterhead. We, the company named below, confirm that:

- We have read and accepted this Terms of Reference, including the service levels, data protection and exit terms.
- The information in our bid is true, and we will provide evidence on request.
- We have no conflict of interest with GBM staff, board members or evaluation panel members, or we have declared it in writing.
- We have not offered, and will not offer, any bribe, gift or improper inducement in connection with this tender, in line with the Bribery Act, 2016, and we will report any solicitation of a bribe to GBM management.
- We are not debarred or under investigation by any government or donor body.
- Our prices include all costs and remain valid for 90 days.

Field	Entry
Company name	
Name	
Title	
Signature	
Date	
Company stamp	