TERMS OF REFERENCE

Procurement of Odoo Configuration, Implementation, Training and Technical Support Services

Background

Men 4 Women (M4W) is a South Sudanese national non-governmental organisation committed to advancing gender equality, transforming harmful social norms, promoting sexual and reproductive health and rights (SRHR), preventing sexual and gender-based violence (SGBV), and strengthening peacebuilding and social cohesion.

As part of its organisational capacity-strengthening efforts, M4W is receiving support through the SUCCESS Programme, implemented by Mercy Corps and IPCS and funded by the European Union (EU). This support provides an opportunity to strengthen M4W's institutional systems, operational efficiency, accountability, and organisational sustainability.

M4W recognises the need for an integrated organisational management system to improve coordination, standardise workflows, strengthen internal controls, enhance transparency, and support timely decision-making. The system should integrate key operational functions, including financial management, procurement, human resources, inventory and asset management, project management, document management, and grant oversight.

M4W therefore intends to configure and institutionalise Odoo ERP as an integrated organisational management system tailored to its operational requirements, approved policies, and procedures. The proposed system will serve nine users and cover relevant applications, including Accounting, Analytic Accounting, Documents, Employees, Payroll, Time Off, Attendances, Purchase, Inventory, Approvals, Expenses, Project Management, Planning, Timesheets, Contacts, Sign, and management reporting and dashboards.

The system should support donor and project budget monitoring, expenditure tracking by budget line, procurement workflows, asset management, staff administration, and monitoring, evaluation, and learning (MEL). The service provider must clearly distinguish standard functionality from additional configuration, third-party applications, integrations, or custom development, including associated licensing, maintenance, and implementation costs. Particular attention should be given to South Sudan payroll requirements, donor reporting, data security, user access controls, and data backup and recovery.

M4W invites qualified Odoo implementation partners or experienced service providers to submit technical and financial proposals covering system configuration, deployment, data setup where applicable, user training, documentation, and post-deployment technical support over an agreed ten-month period. The assignment will be coordinated from Juba, with practical training for nine

users. Two staff members based outside Juba must be accommodated through virtual training or equivalent remote arrangements.

The assignment is expected to commence on 16 November 2026, and interested applicants must submit their applications by 8 November 2026 at 5:00 p.m. Central Africa Time (CAT).

Purpose of the Assignment

The purpose of this assignment is to configure, deploy, and institutionalise Odoo as an integrated organisational management system tailored to M4W's operational requirements, financial and procurement controls, human resource administration, programme management, and grant reporting needs. The assignment will include the required subscription for nine users, system configuration, staff training, documentation, and ten months of post-deployment technical support to promote effective adoption, reliable reporting, and long-term system sustainability.

Specific Objectives

The selected service provider shall:

1. Provide the required Odoo subscription and licensing for nine users, including the agreed applications, subscription period, hosting arrangements, and clearly itemised costs.
2. Assess, configure, and deploy an integrated management system aligned with M4W's approved policies, procedures, and operational requirements, covering finance and accounting, procurement, inventory and asset management, human resources and payroll, programme and project management, grant tracking, and monitoring, evaluation, and learning (MEL), and any other task as agreed with M4W.
3. Establish appropriate system controls and reporting arrangements, including user roles, access permissions, approval workflows, data security, data quality, and management and donor reporting.
4. Build the capacity of M4W's nine designated users through practical, role-specific training, user documentation, and knowledge transfer, including virtual training arrangements for the two staff members based outside Juba.
5. Ensure effective system adoption and sustainability through testing, deployment support, system administration guidance, and ten months of post-deployment technical support, including troubleshooting, maintenance, and agreed routine adjustments.

Scope of Work

Licensing and Subscription Provision

The service provider shall:

- Provide and activate a valid Odoo subscription covering nine users for the agreed subscription period.
- Recommend an appropriate Odoo edition and hosting arrangement based on M4W's operational requirements, security needs, budget, and long-term sustainability.

- Specify the applications and features included in the subscription, available storage, hosting arrangements, licensing restrictions, and relevant service limitations.
- Provide documentation confirming subscription activation and access to the agreed applications.
- Clearly outline renewal costs, subscription terms, user limits, and potential additional charges for extra users, applications, third-party services, hosting, or storage.
- Identify any dependencies on external vendors, paid modules, or additional licenses.

The financial proposal shall separately itemise subscription and licensing costs, hosting, configuration, customization, training, data migration, and technical support to enable M4W to understand both initial and recurring costs.

Business Process Assessment and System Configuration
The provider shall conduct an initial assessment of M4W's existing operational processes, approved policies, reporting requirements, and internal controls before configuring the system.

The assessment shall cover:

- Finance, accounting, and budget management.
- Procurement and supplier management.
- Inventory, equipment, and asset management.
- Human resource administration, payroll, and staff expenses.
- Programme, project, and activity management.
- Grant management and donor-specific budget tracking.
- Approval workflows and segregation of duties.
- Document management and information access.
- Planning, monitoring, reporting, and management oversight.

Based on the assessment, the provider shall prepare a configuration plan showing the proposed applications, workflows, required data, reporting outputs, and any identified system gaps. The plan must distinguish between standard functionality, configuration, third-party solutions, and custom development.

M4W shall review and approve the proposed configuration plan before implementation. Custom development or the introduction of additional paid applications shall only proceed with prior written approval from M4W.

Financial Management and Accounting
The provider shall configure the agreed financial management functionality to support M4W's financial operations, accountability, and reporting requirements, including:

- Configuration of the approved chart of accounts and accounting structure.
- Budget preparation, allocation, monitoring, and expenditure tracking.
- Recording of financial transactions, journal entries, and account reconciliations.
- Management of supplier invoices, payments, staff advances, and expense claims, as applicable.

- Financial approval workflows and segregation of duties.
- Grant- and project-specific budget tracking using appropriate analytical accounts, dimensions, or equivalent functionality.
- Financial reports comparing approved budgets, commitments, actual expenditure, and available balances, where supported by the agreed configuration.
- Management dashboards and financial reporting outputs.
- Audit trails and the storage or linking of relevant supporting documentation.

The configuration shall align with M4W's approved financial policies, delegated authorities, accounting practices, and applicable donor requirements. The provider shall not independently alter financial approval limits, payment authorisation arrangements, or other internal controls.

The provider shall demonstrate how the configured system will generate the financial reports required by M4W and identify any donor-specific reporting requirements that require additional configuration or development.

Procurement, Inventory, and Asset Management
The provider shall configure the agreed procurement, inventory, and asset management functionality to support M4W's procurement and resource management processes, including:

- Purchase requisitions and approval workflows.
- Requests for quotations, quotation comparison, and supplier selection documentation.
- Supplier registration and records management.
- Purchase orders and procurement status tracking.
- Recording and verification of goods and services received.
- Inventory receipts, issuance, transfers, stock balances, and stock movement reports.
- Asset registration, identification, assignment, location tracking, and disposal records, where supported by the selected applications.
- Linking procurement transactions to relevant budgets, projects, and financial records where technically supported.
- Retention of procurement documents and audit trails.
- Reports on procurement activities, supplier transactions, inventory movements, and asset records.

The configured workflows shall reflect M4W's approved procurement procedures, quotation requirements, approval thresholds, and documentation standards. The provider shall identify any gaps between the required procedures and the selected Odoo functionality and recommend practical solutions for M4W's approval.

Fleet Management
The service provider shall assess, configure, and deploy appropriate Odoo Fleet Management functionality to support M4W's vehicle administration and field operations. The system shall, as applicable, support:

- Registration and maintenance of vehicle records, ownership, assigned drivers, duty stations, and vehicle status.

- Vehicle allocation, trip requests, travel authorisation, trip logs, destinations, mileage, and vehicle utilisation.
- Fuel purchase records, consumption monitoring, and fuel expenditure tracking by vehicle.
- Preventive maintenance schedules, repairs, service history, odometer readings, and associated costs.
- Tracking of insurance, registration, roadworthiness certificates, leases, and other vehicle-related contracts and renewal dates.
- Recording of vehicle incidents and accidents, repairs, and related documentation.
- Integration of fleet expenditure with accounting, procurement, inventory, and project budgets where technically supported.
- Management reports covering fuel expenditure, maintenance costs, vehicle utilisation, and total operating costs.

The service provider shall distinguish between standard Odoo Fleet functionality and features requiring additional configuration, third-party applications, or custom development. Any additional costs and licensing requirements must be disclosed and approved by M4W before implementation.

Human Resources, Payroll, and Staff Expenses
The provider shall configure the agreed human resource and staff administration functionality to support:

- Employee records and organisational structure.
- Role-based access to personnel information.
- Leave management, attendance, and related staff administration processes, where included in the agreed scope.
- Payroll processing and associated financial records, where supported by the selected edition and configuration.
- Staff expense claims, advances, reimbursements, and approval workflows, as applicable.
- Storage and management of relevant HR documents.
- HR and payroll reports appropriate to M4W's operational requirements.

The provider shall assess and explain the technical, legal, localisation, and third-party requirements for payroll processing in South Sudan before deployment. This shall include demonstrating how applicable salary calculations, statutory deductions, taxes, and payroll-accounting integration would be handled, where relevant.

Any payroll functionality that is unavailable through standard Odoo applications or the proposed edition must be disclosed, together with the proposed solution, associated costs, licensing implications, and ongoing maintenance requirements. The provider shall not represent payroll as fully compliant with applicable local requirements without demonstrating the basis for that claim.

Access to confidential personnel and payroll information shall be restricted to authorised users.

Programme, Project, and Grant Management
The provider shall configure the agreed project management, planning, and analytical functionality to support M4W's programme implementation and grant oversight requirements, including:

- Registration and management of programmes, projects, grants, and related activities.
- Assignment of responsibilities, tasks, deliverables, deadlines, and implementation milestones.
- Project planning and monitoring of implementation progress.
- Linking projects and activities to approved budgets, expenditure, procurement, and resource use where supported.
- Grant- and donor-specific budget coding or analytical dimensions, as agreed with M4W.
- Tracking of project expenditure against approved budgets and identifying variances.
- Reporting on implementation progress, resource utilisation, budget performance, and outstanding activities.
- Linking relevant project, procurement, financial, and document management processes to minimise duplicate data entry.

The provider shall assess M4W's monitoring, evaluation, and learning (MEL) requirements and explain how these can be supported through standard Odoo functionality, configuration, integration, or additional modules. Where required, the proposed solution should address indicators, baselines, targets, participant data and disaggregation, results tracking, and reporting against agreed project frameworks.

The provider shall clearly identify any MEL or grant management requirements that cannot be met through the proposed configuration. The objective is to establish a practical, integrated system that supports programme oversight and donor reporting without creating unnecessary parallel reporting processes.

User Roles, Permissions, and Internal Controls
The provider shall configure appropriate user access and system controls for the nine designated users, based on their approved roles and responsibilities. This shall include:

- Establishing user accounts, roles, and access permissions.
- Configuring approval hierarchies and segregation of duties.
- Restricting access to confidential financial, payroll, personnel, and safeguarding-related information.
- Configuring approval notifications, transaction histories, and audit trails where supported.
- Testing permissions to verify that users cannot access information or initiate, modify, or approve transactions beyond their authorised responsibilities.
- Establishing procedures for creating, modifying, suspending, and deactivating user accounts.
- Documenting the user-role matrix and system administration procedures.

M4W shall approve the final user-role and access-permission matrix before the system goes live. The provider shall also advise M4W on appropriate password practices, data security, and the principle of granting users only the access necessary to perform their duties.

Data Preparation, Migration, Testing, and Deployment
The provider shall work with M4W to prepare the system for operational use. The scope shall include:

- Developing and agreeing on a data migration plan, including templates, responsibilities, and validation procedures.
- Identifying the data required for migration, such as opening balances, supplier records, employee records, inventory and asset registers, and active project or grant information.
- Supporting M4W to prepare, clean, and validate the agreed data before migration.
- Migrating approved datasets and verifying their accuracy and completeness.
- Testing configured applications, approval workflows, access permissions, reporting outputs, and relevant integrations.
- Recording identified defects, documenting corrective actions, and resolving material issues before deployment.
- Conducting user acceptance testing with designated M4W personnel.
- Obtaining M4W's documented acceptance of the configured system before go-live.
- Establishing agreed arrangements for data backup, restoration, system administration, and recovery in the event of data loss or system failure.
- Providing deployment documentation and conducting a formal handover to designated M4W personnel.

Data migration shall be limited to the datasets agreed with M4W and shall comply with applicable confidentiality, data protection, and access control requirements. M4W shall retain ownership of its organisational data.

The provider shall not proceed to full deployment until material defects identified during user acceptance testing have been resolved or explicitly accepted in writing by M4W.

Staff Training and Capacity Building
The provider shall deliver practical, role-specific training for all nine designated users to enable them to operate the configured system effectively and confidently.

Training shall cover the applications relevant to each user's responsibilities, including:

- System navigation and routine Odoo use.
- Finance, accounting, budget monitoring, and financial reporting.
- Procurement, supplier management, inventory, and asset processes.
- HR administration, payroll, and staff expenses, as applicable.
- Programme and project planning, implementation tracking, and reporting.
- Grant and donor budget monitoring, where configured.
- Approval workflows, document management, and user permissions.
- Generation of operational and management reports.

- Basic troubleshooting, system administration responsibilities, and escalation procedures.

Training shall use M4W-specific scenarios and practical exercises in a test environment or through agreed test transactions. The provider shall prepare user-friendly training materials and document attendance and a basic assessment of user competence.

Training shall primarily be conducted in person in Juba, with appropriate virtual training arrangements for the two staff members based outside Juba. The provider shall ensure that these staff members can participate effectively, access training materials, complete practical exercises, and receive follow-up support.

The provider shall submit a training plan specifying the sessions, target users, delivery methods, schedule, materials, and assessment arrangements for M4W's approval.

Documentation and Knowledge Transfer
To promote system sustainability and reduce dependence on external support, the provider shall prepare and hand over relevant documentation, including:

- System configuration and application register.
- User guides and role-specific operating instructions.
- User-role and access-permission matrix.
- Documented approval workflows and key system controls.
- Data migration and validation records.
- System administration and user account management guidance.
- Backup, restoration, and recovery procedures.
- Reporting instructions and templates for agreed management and donor reports.
- Records of training delivered and identified capacity gaps.
- A summary of known system limitations, customisations, third-party dependencies, and maintenance requirements.

All documentation shall be provided in accessible electronic formats and explained to designated M4W personnel during the handover process.

Post-Deployment Technical Support
The provider shall deliver ten months of technical support following the agreed support commencement date, as specified in the approved workplan and contract.

Support shall include:

- User assistance and troubleshooting.
- Investigation and resolution of system errors and configuration issues.
- Routine configuration adjustments within the agreed scope.
- Guidance on workflows, reporting, and system use.
- Support for user access and basic system administration.
- Advice on system updates, maintenance, backups, and recovery procedures.
- Documentation of significant incidents, resolutions, and corrective actions.

- Periodic reviews of system use, recurring issues, and outstanding support needs.
- Refresher guidance for users where recurring difficulties indicate a capacity gap.

The provider's technical proposal shall specify support hours, communication channels, response and resolution targets, issue prioritisation, escalation arrangements, exclusions, and any charges for work beyond the agreed scope.

The provider shall maintain a record of support requests and actions taken and provide periodic support summaries to M4W. Any proposed paid upgrade, new module, custom development, or additional service outside the approved scope must be submitted to M4W for written approval before costs are incurred.

Deliverables and Acceptance Criteria

Deliverable	Minimum acceptance evidence
1. Inception and assessment report	Documented assessment of M4W's operational requirements, existing workflows, system gaps, risks, and proposed solutions.
2. Implementation and configuration plan	Approved plan specifying the Odoo edition, applications, hosting, configuration approach, responsibilities, implementation schedule, costs, dependencies, and support arrangements.
3. Subscription and licensing	Evidence of an activated Odoo subscription for nine users, including the agreed edition, applications, hosting arrangements, subscription period, and associated costs.
4. Configured Odoo system	Agreed applications, workflows, financial and operational controls, reporting functions, and user permissions configured and demonstrated against M4W-approved requirements.
5. Data migration and system testing	Records of agreed data migration, data validation, workflow and permission testing, identified defects, corrective actions, and user acceptance testing results.
6. Training and documentation package	Training materials, attendance and competency assessment records for nine users, user guides, system administration documentation, and evidence of knowledge transfer, including remote training for the two staff members based outside Juba.
7. Go-live and handover report	Documented deployment approval, confirmation of user acceptance, outstanding issues and agreed actions, system administration handover, and applicable backup and recovery procedures.
8. Post-deployment technical support	Support records documenting requests received, issues addressed, resolutions, outstanding matters, and periodic service reports throughout the ten-month support period.

The service provider shall submit a detailed implementation schedule identifying deliverable milestones, timelines, dependencies, and review points for M4W's approval.

M4W shall review each deliverable and provide feedback within an agreed timeframe. Deliverables that do not meet the approved requirements shall be revised by the service provider

within a timeframe agreed with M4W, at no additional cost where the revisions relate to the approved scope of work.

Final acceptance shall be confirmed by M4W in writing upon satisfactory completion of the relevant deliverable. Deployment shall only proceed following documented user acceptance and approval by M4W, subject to the agreed procedures for resolving or formally accepting any outstanding issues.

Acceptance of the implementation deliverables shall not exempt the service provider from fulfilling its contractual obligations during the ten-month post-deployment technical support period.

Required Qualifications and Experience

The service provider must demonstrate:

- Proven experience implementing and configuring Odoo for NGOs, non-profit organizations or comparable institutions.
- Competence in accounting, procurement, HR, project management and organizational workflow configuration.
- Experience setting up user permissions, approval hierarchies and internal controls.
- Demonstrated capacity to train non-technical staff using practical methods.
- Capacity to provide reliable technical support for the full contracted period.
- Experience with data migration, system testing, documentation and handover.
- Availability of qualified personnel for implementation and support.

Preference may be given to an authorized Odoo partner or provider with verifiable Odoo implementation credentials and relevant experience supporting organizations in South Sudan or similar operating environments.

Applicants must disclose any third-party dependencies, recurring costs and material limitations of their proposed solution.

Application Requirements

Interested providers shall submit:

1. Technical proposal: Understanding of the assignment, proposed architecture, modules, configuration methodology, implementation schedule, testing and deployment approach.
2. Financial proposal: Itemized costs in USD for licensing, configuration, customization, training, technical support, taxes and any other applicable charges.
3. Company profile: Legal registration details, relevant technical capacity and contact information.
4. Evidence of experience: At least two comparable Odoo implementation assignments, including client references.

5. Team composition: CVs and roles of proposed implementation, finance-system and technical-support personnel.
6. Implementation plan: Milestones, dependencies, training arrangements and proposed go-live process.
7. Support plan: Support duration, service hours, response targets, escalation arrangements and exclusions.
8. Licensing and hosting details: Odoo edition, subscription conditions, hosting arrangements, renewal costs and any additional software requirements.
9. Conflict-of-interest declaration: Disclosure of actual or potential conflicts relevant to the procurement.

Evaluation Criteria

Criterion	**Weight**
Relevant experience and technical qualifications	20%
Technical approach and understanding of M4W's requirements	30%
Implementation, training and support plan	20%
Financial proposal and total cost of ownership	20%
References, service reliability and value for money	10%
Total	**100%**

M4W may verify references, request a demonstration, seek clarifications or conduct technical discussions before selecting a provider. Evaluation shall follow M4W's applicable procurement procedures.

Contract Management and Reporting

The selected provider will report to the M4W Executive Director or designated implementation focal person and coordinate with designated Finance, Procurement, Programme and Management users.

The provider shall submit progress updates against the agreed implementation plan and promptly report material risks, delays, security concerns and additional costs requiring approval.

Ownership, Confidentiality, Data Security, Safeguarding and PSEAH

All deliverables, working documents, tools, configuration documentation, and final products developed under this assignment shall remain the property of Men 4 Women. M4W shall retain ownership and control of its organisational data, and the service provider shall hand over all relevant documentation, data exports, and administrator access upon completion of the assignment.

The service provider shall maintain strict confidentiality of all M4W financial, personnel, donor, safeguarding-related, and operational information. Organisational documents and sensitive data shall not be disclosed to third parties, used for purposes unrelated to the assignment, or shared through external services without M4W's prior written authorisation. The provider shall implement appropriate access controls and data security measures to prevent unauthorised access, loss, disclosure, or misuse of information and shall disclose any hosting, data storage, licensing, or third-party service arrangements that may affect M4W's control of its information.

The service provider shall comply with M4W's applicable data protection, safeguarding, professional conduct, and Protection from Sexual Exploitation, Abuse and Sexual Harassment (PSEAH) policies and procedures. M4W maintains zero tolerance for sexual exploitation, abuse, and sexual harassment. The provider must uphold professional boundaries, respect the dignity and rights of all stakeholders, and ensure safe, respectful, and non-discriminatory interactions throughout the assignment.

Any safeguarding or PSEAH concerns arising during the assignment shall be reported promptly through M4W's designated reporting mechanisms, in accordance with confidentiality, survivor-centred principles, and protection from retaliation.

Applicants must confirm their willingness to comply with these requirements as a condition of engagement. Any breach may result in termination of the assignment or other appropriate action in accordance with applicable policies and contractual provisions.

Contract Period and Payment Arrangements

The contract shall cover the agreed implementation period and ten months of post-deployment technical support, with the detailed schedule established during contracting.

Payments shall be linked to agreed deliverables and acceptance milestones, subject to M4W's procurement and financial procedures. The financial proposal must distinguish one-time implementation costs from recurring subscription and support costs.

Submission of Applications

Interested companies should submit their complete applications electronically to men4womensouthsudan@gmail.com, using the subject line: **Proposal – Odoo Configuration, Implementation, Training and Technical Support**

Only successful applicants will be contacted following the evaluation process. M4W reserves the right to reject any application or cancel the selection process in accordance with its applicable procurement procedures.