



REQUEST FOR PROPOSALS

FOR

PROVISION OF ICT SERVICES

ELIGIBLE TO REGISTERED FIRMS ONLY
(NOT INDIVIDUALS)

Description of Bid: DEVELOPMENT OF AN INSTITUTIONAL MANAGEMENT INFORMATION SYSTEM.

Bid Number: MESPT-ICT-10100-2026

Bid Closing/Opening Date: 14th July 2026

Bid Opening Time: 12:00 noon East Africa Time

Issue Date: 30th June 2026

1. Micro Enterprises Support Programme Trust (MESPT) invites sealed bids from eligible candidates for development of an Institutional Management Information System Eligible candidates may obtain further information from MESPT at the address below during business hours **0800hrs** to **1700hrs**.

Micro Enterprises Support Programme Trust (MESPT)

Tausi Lane 01, Westlands

P.O. Box 187-00606,

Nairobi, Kenya

Tel: 0722 207 905 / 0735 333 154

Email address: procurement@mespt.org

2. Bid documents herein are free of charge.
3. All bids shall not be accompanied by bid security.
4. Complete bidding documents **shall be** submitted through electronic means in the manner indicated below:

[submission via email: tender@mespt.org]

Email attachments should be 10Mbs maximum. If it exceeds, submit in form of a link.

Bids must be received on or before the date and time indicated below:

Date: 14th July 2026

Time: 12:00 Noon (East Africa Time)

5. Prices quoted should be net inclusive of all taxes and quoted in **Kenyan Shillings**. All prices shall remain valid for **90 days** from the closing date of the bid.

Link for clarifications: [MESPT-ICT-10100-2026 - Clarification](#)

Chief Executive Officer

Micro Enterprises Support Programme Trust

TERMS OF REFERENCE

DEVELOPMENT OF AN INSTITUTIONAL MANAGEMENT INFORMATION SYSTEM

INTRODUCTION

Micro-Enterprises Support Programme Trust (MESPT) is a Kenyan development organization established in 2002. MESPT's overall objective is to promote economic growth, employment creation and poverty alleviation through enterprise development. This is achieved predominantly through support to the development of agricultural value chains whilst embracing and promoting the green growth and climate change agenda. Through its vision of building a more Prosperous Society, MESPT facilitates increased commercialization, decent employment and green transformation through targeted interventions in the selected value chains. The Trust is a multi-donor entity jointly founded by the Government of Kenya and the European Union who later relinquished their position to the Royal Danish Embassy in Kenya, Ministry of Foreign Affairs of Denmark (DANIDA). To learn more about MESPT, please visit www.mespt.org.

I. INTRODUCTION AND BACKGROUND

This Terms of Reference (TOR) outlines the requirements for developing a robust, Salesforce-based Management Information System (MIS) integrated with other systems. The system is designed to unify several departments under a single source of truth, replacing fragmented manual processes with an automated, data-driven ecosystem.

Current operations across Finance, Programmes, Credit, MEAL, GYSI, and the Executive Office are hindered by siloed data, reporting delays, and manual tracking. Key pain points include inconsistent document management and the inability to track real-time beneficiary and portfolio performance.

The MIS will transform the organization from reactive reporting to proactive decision making. By automating the end-to-end lifecycle of programmes; from partner engagement to impact evaluation; the system ensures transparency, institutional memory, and superior safeguarding standards.

II. OBJECTIVE

The primary objective of the proposed system is to develop an integrated, secure, and data-driven platform that centralizes multi-year programme management while ensuring data integrity, automated workflows, and enhanced visibility through role-based dashboards to optimize operational efficiency, stakeholder collaboration, and compliance tracking.

- **Centralized Data Management:** Establish a single repository for all multi-year programme documentation and results.
- **Automated Workflows & Governance:** Streamline internal approvals and partner interactions through automated processes and dedicated Partner Portals.
- **Enhanced Visibility:** Provide role-based dashboards tailored to departmental needs from high level executive insights to granular departmental notifications.
- **Advanced Tracking & Compliance:** Ensure rigorous results/indicator tracking (MEAL), disaggregated inclusion data (GYSI), and strengthened sub-grantee financial oversight (Finance).
- **Data Integrity:** Leverage Power BI for advanced analytics while maintaining strict data quality controls and security protocols.

III. **SCOPE OF WORK**

The selected vendor will be responsible for the end-to-end execution of the following tracks:

a) **FUNCTIONAL REQUIREMENTS**

Programme Registry & Lifecycle Management

- **Central Registry:** The system must provide a unified object model to track programmes, including activities, budgets, staffing, and geography.
- **Approval Workflows:** Automated multi-stage approval processes for annual plans and programme changes with full version control.
- **Activity Tracking:** Ability to link specific activities and field evidence (e.g., photos, geo-tags) to programme records without performance degradation.

Grant & Agreement Management

- **Compliance Tracking:** Automated alerts and reminders for donor reporting deadlines and compliance milestones.
- **Financial Oversight:** Real-time tracking of "Budget vs. Actuals" (BVA) for both prime grants and sub-grantees.

Indicators & Results (MEAL)

- Results Framework: Tools to define indicator catalogues (OutputàOutcome àImpact) with baseline and target values.
- Data Validation: Built-in rules to ensure data quality at the point of entry, reducing the need for heavy manual cleaning.
- Disaggregation: Automated calculation of results by gender, age, disability, and refugee status (GYSI metrics).

Partner & Beneficiary Registry

- Unique Identification: Assign unique IDs to all partners (FSPs/SMEs) and beneficiaries (farmers/clients) to prevent data duplication. For individuals, national ID numbers can be used for unique identification.
- Partner Portal: A self-service interface for external partners to upload reports/data and view reports.

Executive Oversight & Reporting

- Document Repository: A centralized, searchable library for multi-year documents (agreements, board minutes, evaluations).
- Strategic Goal Tracking: Capability to map every programme activity to specific Strategic Plan 2026–2030 objectives.
- Impact Aggregator: Automated roll-up of key indicators: Total Farmers reached, MSMEs supported, Jobs created, Sales turnover, women and youth reached.
- Green Metrics Module: Specific fields and validation rules to track adoption of climate-smart and regenerative agriculture practices.
- Programme Portfolio Performance; track Programme progress against targets, Budget absorption rates, Implementation milestones, Partner performance
- Market Linkage Tracker: Records for "Export Readiness" status and volume of sales realized through created market links.

Financial Health & Organization-Wide Monitoring

- Funding Gap Analysis: Real-time comparison of "Total Funding Secured" vs. "Annual Target" with automated calculation of the remaining pipeline needed.

- **Cost-Ratio Analytics:** Automated categorization of expenses to track Operational vs. Programme cost ratios.
- **Liquidity & Cash Flow Tracker:** Integration for tracking the performance of revolving funds, investments and general cash positions.
- **Productivity Metrics:** Linking staff records to programme milestone completions to measure institutional performance.

Credit Loan Pre-Approval

- The system must manage the end-to-end Pre-Approval Loan Origination workflow, including KYC document collection, collateral verification, and credit risk review.
- **KYC Document Management:** The system must allow users to upload, categorize, and store applicant identity documents (e.g., IDs, tax certificates).
- **Collateral Verification:** The system must record asset details, track valuation reports, and capture ownership confirmation data.
- **Workflow Automation:** The system must enforce a sequential workflow that blocks loan approval until KYC and collateral tasks are marked "Complete."
- **Audit Logging:** The system must log the time, date, and user ID for every document uploaded and collateral status change.

Ecosystem & Risk Management

- **Partnership CRM:** A specialized module for "Strategic Partners" (Banks, Donors, Cooperatives) to track policy influence engagements, private sector collaborations and market system actors engagement.
- **Integrated Risk Register:** A central hub to log Programme risks, financial risks, Safeguarding, Donor compliance, and ESG compliance with an "Audit Resolution" tracker for open findings.
- **Donor Mapping:** A "Multi-Donor Template Engine" that maps internal indicators to specific donor formats to eliminate manual reporting duplication.
- **Data Quality (DQ) Exception Engine:** A module that flags records missing "surrogate keys" or those failing "Logical Checks" (e.g., Beneficiary count > District population).
- **Audit Trail Visualization:** A "History Tracking" component on all objects showing Who, What, When, and Original vs. New Value.

- Evaluation Tracking: A dedicated repository for baseline/midline/endline studies that links "Recommendations" to "Management Responses" and subsequent "Action Items."

Document & Knowledge Repositor

- Advanced Metadata Tagging: Every uploaded file must be tagged by Donor, Programme, Year and Document Type (e.g., Governance Minute, Audit Report) to enable instant filtering.
- Version Control & Retention: Ability to lock final versions of agreements and automate document archiving/deletion based on a defined Retention Policy.
- Global Search: A "Google-like" search capability that scans document titles and metadata across multi-year repositories.
- GYSI & Safeguarding Hub
- Mainstreaming Checklists: Integrated safeguarding risk assessments required at the "Activity" or "Programme" creation stage.
- Transformation Metrics: Tracking qualitative "Empowerment" scores alongside quantitative "Reach" data (e.g., Women in leadership roles within supported MSMEs).
- Incident Management: A secure, restricted-access module to log and track the resolution of Safeguarding/ESG incidents.
- Role-Based Dashboards: Customized real-time views for different levels of management, powered by Power BI integration for advanced analytics.

Reporting Portals & Power BI

- Bi-Directional Partner Portal: Partners can upload narrative/financial reports and evidence (photos/attendance lists) while viewing their own performance dashboards.
- Automated Validation Gate: The portal must prevent submission if "Mandatory Evidence" (e.g., a signed participant list) is missing or if "Beneficiary Counts" exceed logical limits.
- Drill-Through Analytics: dashboards must allow executives to click a chart element (e.g., an underperforming region) and jump directly to the specific Salesforce Record.
- Ability to generate both Customized and inbuild reports for target users at different levels and in various formats, excel, pdf etc.
- Ability to export reports in various formats, excel, pdf etc.

Workflow & Governance Automation

- Multi-Level Approval Engine: System must support conditional routing for workplans and budgets (e.g., if budget > \$X, route to Executive Office; if GYSI risk is "High," route to GYSI lead).
- Automated Document Validation: Workflows that prevent a "Grant Close-out" unless all mandatory metadata (Evaluations, Financial Reports, Governance Minutes) are uploaded.
- Dynamic Task Triggers: Automatically generate "Donor Submission" tasks for Fundraising/Finance teams 30 days before a compliance milestone is due.

Advanced Data Architecture

- Canonical Data Mapping: Implementation of a "Global ID" system for Farmers, MSEs, and Partners to prevent fragmentation across Credit, MEAL, and Finance modules. Individual national IDs should be used to uniquely identify people.
- Slowly Changing Dimensions Type 2 Tracking: The analytics layer must support historical "point-in-time" reporting (e.g., "What was the risk level of this programme in Q2 2024 vs. now?").

Enterprise System Integrations

- Power BI: Real-time analytics dashboards embedded in Salesforce
- Navision: for financial information required on Dashboards and other decision making.
- IPRS: Real-time beneficiary ID verification
- Adobe Sign: Electronic signature workflows for document approvals
- EDMS; document management system for document archiving, versioning, search etc.

Mobile Data Collection

- Deploy Taro Works mobile application for offline/online field data collection
- Create customized forms and jobs for field officers
- Enable real-time data synchronization with Salesforce

Some of the Required Dashboards (Visual Summary)

• Dashboard Name	• Key Visual Elements and Indicators	• Primary Purpose
Strategic Impact	• Indicators: Farmers and MSMEs supported, Women and youth reached, Jobs created, Sales turnover, Loans disbursed (desegregated – value chain and green), Farmers linked to market • Visuals: Impact counters, Geographic heat maps, Progress bars vs targets	Mission-level tracking for Board/Executive Office.
• Programme Performance	• Indicators: Programme progress vs targets, Budget absorption, Partner performance, Key milestones • Visuals: Programme scorecards, Traffic light system (green/yellow/red)	Real-time "health check" for major programmes; FIYMA, etc.
• Financial Health	• Indicators: Total grants secured, Budget utilization, Cash flow forecast, Programme vs operational cost ratio • Visuals: Budget utilization charts, Funding pipeline tracker	Ensuring financial sustainability and liquidity.
• Partner & Ecosystem	• Indicators: Number of financial institutions engaged, Cooperatives supported, Market actors engaged, Value chain investments mobilized • Visuals: Partnership network maps	Visualizing MESPT ecosystem influence and partnerships.
• Risk & Compliance	• Indicators: Open audit issues, Compliance status, Programme risk levels, Safeguarding incidents	Manage institutional risk

	• Visuals: Risk heat maps, Compliance trackers	
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Some of the Reporting Portal Capabilities Matrix

Feature	Partner Reporting Portal	Internal Management Portal
Data Entry	Upload Narrative/Financial/Results	Review, Approve, or Reject Submissions
Evidence	Attach photos, GPS logs, attendance	View evidence linked to KPIs
Automation	System reminders for due dates	Overdue alerts for partner managers
Visibility	View own contract & targets	View consolidated "Partner Scorecard"

b) NON-FUNCTIONAL REQUIREMENTS

- **Security & Access Control:** Implement Role-Based Access Control (RBAC) to ensure staff only see data relevant to their department (e.g., sensitive safeguarding or financial data).
- **Scalability:** The system architecture must support an increasing volume of multi-year programme data and high-resolution activity evidence without performance loss.
- **Data Integrity & Traceability:** Maintain a full audit trail of all record changes to ensure accountability for donor audits and internal controls.
- **Interoperability:** The platform must support seamless integration with external tools like Microsoft 365 (for document collaboration), IPRS for ID validation, adobe sign, Power BI (for reporting) amongst others.
- **Availability:** Ensure high system uptime (e.g., 99.9%) to support real-time field data collection and executive decision-making.
- **Usability:** The interface must be intuitive to minimize the training burden for staff across different technical skill levels.
- **Offline Data Collection (Mobile):** To solve the "Delayed Reporting from Field Partners" challenge, the system must support offline data entry via mobile application (e.g., taro works) that syncs once connectivity is restored.
- **High-Resolution Geo-Tagging:** Support for Geographic Heat Maps to visualize regional scaling or exit decisions.

- **Advanced Data Cleaning (ETL):** Built-in data staging areas where partner data is "quarantined" and validated before merging into the "Single Source of Truth."
- **Multi-Dimensional Reporting (Power BI):** The integration must allow for "One-Click" switching between Donor views and Organizational views of the same data.
- **Historical Data Archiving:** Ability to store and retrieve data from past strategic periods (pre-2026) for longitudinal impact studies (Income growth/Climate resilience trends).
- **Encryption & Privacy:** Credit and Safeguarding data must be encrypted at rest and in transit (AES-256), with strict field-level security to prevent unauthorized access.
- **Portal Security (External Access):** The Partner Portal must support Multi-Factor Authentication (MFA) to protect sensitive organizational data.
- **Data Latency (Power BI):** Scheduled refreshes must ensure that "Strategic Dashboards" are never behind real-time field entries.
- **Concurrency:** The system must support simultaneous portal logins from hundreds of field partners during "peak reporting" windows (e.g., end-of-quarter) without lag.
- **Granular Permission Sets (RACI-Aligned):** Security architecture must follow the defined Data Domain Ownership (e.g., Finance can edit budgets, but only MEAL can edit Indicator Definitions).
- **Analytics Latency & ETL Integrity:** The Extract, Transform, Load/ Extract, Load, Transform (ETL/ELT) process from Salesforce to the Power BI semantic model must maintain referential integrity, specifically for multi-year historical tracking.
- **Metadata Search Performance:** The Search function must return results for multi-year documents (filtered by programme/donor/year) in under 3 seconds.
- **Mobile-First Data Entry:** Given the "Field/Travel" requirement, the interface for activity evidence (photos/docs) must be optimized for low-bandwidth mobile environments.
- **Privacy by Design (PII & Safeguarding):** High-sensitivity fields (safeguarding incidents, refugee status) must be obfuscated or restricted via Field-Level Security, even for system report-builders

IV. EXPECTED DELIVERABLES

The vendor must deliver the following artifacts and outcomes:

I. Inception Report

- Phased system development project plan and approach with clear timelines and costs.

2. Requirements gathering, Analysis, Design & Architecture

- Business Requirements Document (BRD): A consolidated version of functional and non-functional needs, mapping them to specific MESPT system goals.
- Functional Specification Document (FSD): Technical "how-to" for every feature, specifically detailing:
 - Workflow Logic: Conditional routing rules for approvals.
 - Validation Rules: Logic for "Logical Checks"
- Data Model / Schema: A visual map of the Unified Object Model, showing relationships between Programmes, Grants, Partners, and Beneficiaries (using National IDs as Primary Keys). etc
- System Architecture Diagram: A high-level view showing the integration of Salesforce with Navision (Finance), IPRS (Identity), Adobe Sign (e-Sign) and Taro Works (Mobile).
- API Inventory & Integration Mapping: Technical specifications for the "Canonical Data Mapping" and real-time synchronization between systems

3. System Development, Configuration & Quality Assurance (QA)

- Traceability Matrix: A sheet ensuring every requirement maps to a specific piece of code or configuration.
- Master Data Management (MDM) Strategy: Protocol for the Unique Identification system to prevent data duplication across modules.
- Metadata Tagging Schema: A defined taxonomy for the Document Repository (Donor, Year, Type, etc.) to power the Global Search.
- TaroWorks Job & Form Templates: Offline-ready mobile forms for field evidence collection (geo-tags, photos).
- Test Plan & Scripts: Comprehensive tests for:
 - UAT (User Acceptance): Functional and non-functional requirements.
 - Integration Testing: testing the various systems integrations Navision (Finance), IPRS (Identity), Adobe Sign (e-Sign) and TaroWorks (Mobile) amongst any other.
 - Load Testing: Ensuring "Activity Tracking" doesn't suffer performance degradation with high data volumes.
 - Data Quality (DQ) Exception Report: Results from the initial data migration phase.

- System UAT pass rate of 90% and above

4. Capacity Building & Sustainability

- Knowledge Transfer Plan: A roadmap detailing the training schedule, topics covered, and assessment methods for various end users and ICT teams.
- Standard Operating Procedure (SOP) / User Manual: A step-by-step guide for performing all functions in the system
- Training Attendance & Assessment Records: Evidence of staff participation and their successfully completed competency tests.

5. System Implementation / Deployment to Production

- Deployment Roadmap
- Data Migration
- Role-Based Access Control (RBAC) Matrix: Definition of who sees what
- System Manuals & Training Kits: Tailored guides for Field Staff (Taro Works) and Executives (Power BI Drill-throughs) and ICT
- Disaster Recovery & Uptime Plan: Documentation of how 99.9% availability will be maintained, including integrations uptime e.g. Salesforce-Navision, IPRS, adobe, Taro works.
- Handover Report: A final document marking the transition of responsibility from the vendor to the internal teams, including a list of any known issues.

V. TECHNICAL AND ORGANIZATIONAL REQUIREMENTS

To be considered, the vendor's proposal must explicitly include:

- **Proposed Migration Approach:** A detailed methodology explaining the tools, development strategies and steps taken to ensure delivery of a robust system that meets the functional and non-functional requirements as detailed in the Scope section above.
- **Technical Capacity of the Team:** Resumes/CVs and professional certifications (e.g., Salesforce Developer and administration certificates etc.) of the specific engineers assigned to this project.
- **Organizational Experience:** Proof of company capability in handling similar sales force development projects.

- **Reference Letters:** A minimum of three (3) formal reference letters from previous clients detailing successful salesforce development of a scale similar to the scope of work above completed within the last 7 years.

VI. **FINANCIAL PROPOSAL STRUCTURE**

Vendors are required to detail the total cost for the complete project scope.

VII **ASSIGNMENT TIMELINES**

The consultant should finish all the above within fourteen (14) weeks.

VII. **PART VI: EVALUATION AND QUALIFICATION CRITERIA**

Stage 1: Preliminary/Mandatory Evaluation

The following criteria apply for the preliminary/mandatory evaluation. Failure to meet the requirements of the preliminary/mandatory evaluation shall lead to disqualification from the rest of the bidding process.

1. Must submit a duly filled serialized Technical Proposal.
2. Must submit a duly filled Financial Proposal.
3. Company's certificate of incorporation/registration.
4. Latest CR12 not more than 12 months.
5. Must submit a current and valid Tax Compliance Certificate issued by the Kenya Revenue Authority.
6. Must submit copies of the Identification Card (ID) or passports of the consultants.

Stage 2: Technical Evaluation

The evaluation of each response to this RFP will be based on its demonstrated competence, compliance, format, and organization. The purpose of this RFP is to identify those suppliers that have the interest and capability to support MESPT with the development of the institutional Management Information System for the salesforce.

Evaluation Criteria

1. **Completeness of Solution in regard to satisfying requirements.** Evaluation of the supplier's overall solution regarding how well it satisfies our requirements. Include planning, scheduling, designing, implementing, managing risks and post migration testing and validation.
2. **Experience.** Evaluation of the supplier's experience implementing the proposed solution. The supplier must demonstrate that they can provide a solution that meets the requirements of this RFP and encompass flexibility, scalability, performance, management,

security, and usability while leveraging our existing system components where feasible. Evaluation of the supplier's track record of product service, support, and customer satisfaction. Supplier commitment to developing, enhancing, and maintaining systems and flexibility of systems to meet future changing business needs.

The following criteria shall apply.

Criteria	Points
Understanding of the assignment (10 points)	10
Relevance of Approach & methodology with a detailed work-plan and clear timeframes (20 points)	20
Qualification and experience profile of the firm relevant to this assignment. At least 5 years' experience in salesforce development. Proof indicating that the vendor is a salesforce Certified Partner. (25 Points)	25
Technical qualifications of the technical personnel, certified personnel with certifications for salesforce developer certifications, salesforce administration certifications etc. The developers will have at least 4 years' experience in salesforce development. (25 Points)	25
Letters of recommendation by three major clients where the vendor has implemented a similar solution of the size of MESPT or larger. Please provide 3 references and their contacts including their recommendation letters and completion certificates (20 points)	20

Minimum points for technical evaluation is 70 points.

Stage 3: Award Selection Method

LCS – Least-Cost Selection Method will be used to select the winning bidder.

In the case of Least-Cost Selection (LCS), MESPT's evaluation committee will select the Bidder whose Proposal is the lowest evaluated total price among those Proposals that achieve the minimum technical score required to pass, notify the bidder and invite them to negotiate the Contract.

Notice to bidders on Technical Evaluation

- All bidders should indicate reference sites on salesforce development and implementation.
- All proposals shall be submitted in soft copy.
- Bidders Must meet all our requirements to be progressed to the financial evaluation.

Financial Evaluation

- The lowest evaluated bidder who meets all our technical evaluations will be recommended for award

- **Detailed Cost Schedules:** Provide detailed, itemized unit and total costs for each component and service proposed.

Deliverable	Percentage payment
Inception Report	10 %
Requirements gathering, Analysis, Design & Architecture deliverables	15%
System Development, Configuration & Quality Assurance deliverables	40%
Capacity Building & Sustainability Deliverables	10%
System Implementation / Deployment to Production	25%
Total	100%

Conditions

- MESPT reserves the right to accept or reject any proposal.
- Any canvassing will lead to automatic cancellation of the submitted proposal.

VII. SUBMISSION OF PROPOSALS

The Bidders should submit their bids to tender@mespt.org on or before **14th July 2026 at 1200 noon**. Kindly send your clarifications to procurement@mespt.org by **7th July 2026 at 0000Hours**. Responses to clarifications shall be provided on **8th July 2026**. Check for clarifications in the link provided above before submission of your proposal.

Conditions

- MESPT reserves the right to accept or reject any proposal.
- Any canvassing will lead to automatic cancellation of the submitted proposal.