



TERMS OF REFERENCE

CONSULTANCY SERVICES FOR THE PROVISION OF MAINTENANCE AND SUPPORT OF SAGE 300 ERP, INCLUDING NEW INSTALLATIONS, UPGRADES, TRAINING, AND DEVELOPMENT

MARCH 2026

1. About FSDT

Established in 2004, the Financial Sector Deepening Tanzania (FSDT) is a donor-funded financial sector market facilitator that aims to achieve poverty reduction through a transformative financial sector that offers inclusive and sustainable financial solutions to improve the livelihood, wellbeing, and empowerment of underserved Tanzanians. FSDT's work is guided by the Market Systems Development (MSD) approach, which aims to develop market systems that benefit the poor, offering them capacities and opportunities to improve their lives.

Currently, FSDT's main target markets are women, youth, and MSMEs, who have been identified as the most financially excluded market segments in the country. FSDT is dedicated to supporting the financial sector in delivering inclusive, quality financial solutions that meet the financial needs of women, youth, and MSMEs.

Through its catalytic function, FSDT hopes to achieve the following changes in the market:

- Improved policies, legal and regulatory frameworks that promote gender equality, as well as economic and financial opportunities for women, youth, and MSMEs.
- Improved availability of relevant financial sector infrastructures that will equip the financial sector players and other stakeholders with the ability to meet the needs and aspirations of women, youth, and MSMEs.
- Financial service providers developing and scaling innovative and responsive financial solutions/tools for women, youth, and MSMEs to promote equality, empowerment, and wellbeing.
- Improved confidence and capability of women, youth, and MSMEs to demand and use financial solutions.

2. Rationale of the assignment

FSDT seeks to appoint a suitable and accredited Sage Service Provider to provide an end-to-end software system support and maintenance services for Sage 300 ERP (formerly Sage ERP Accpac), including new installations, upgrades, training, and development for a period of three months.

3. Scope of Work

The consultant/firm will be responsible for the following deliverables throughout the assignment. The service provided should be in alignment with the FSDT policy and procedures.

- **Application Management**

This includes support on the Sage 300 ERP system administration; the vendor will be required to demonstrate a Sage Certified partnership.

- **Incident Management**

The consultant will be responsible for managing the lifecycle of all incidents. The goal of the incident management process is to restore normal service operations as quickly as possible,

minimizing the adverse impact on business operations. This will be achieved by establishing a single point of contact, including phone number, email address, and other necessary logging tools.

- **Request fulfilment**

The consultant will enable users to request and receive standard services; to source and deliver these services; to provide information to users about services and procedures for obtaining them; and to assist with general information, complaints, and comments.

- **Event management**

The consultant will be responsible for detecting and classifying events occurring within the Sage 300 ERP application environment, as well as advising on and selecting the appropriate control action to take.

- **Availability management**

The consultant will optimize the ERP's capacity to support FSDT in delivering a cost-effective, sustained level of Sage 300 ERP availability that will enable FSDT to meet its objectives. The vendor will be responsible for ensuring Sage 300 ERP is up and available for use in accordance with the conditions of the respective SLAs.

- **Access management**

The consultant will be responsible for ensuring only authorized FSDT users are given the rights necessary to access Sage 300 ERP and prevent non-authorized users from gaining unauthorized access. This should include, but not be limited to:

- Establishing and maintaining the access request process, verifying access, or providing access rights.
- Ensuring the availability and regular review of access logs o Remove/ restrict rights.

- **Problem management**

The vendor shall be responsible for proactively eliminating recurring incidents and minimizing the impact of the incidents that cannot be prevented. The vendor should have the tools and ability to detect, categorize, and resolve the problems.

- **Service reporting**

The vendor should have a clear plan to provide structured reporting to FSDT on the level and quality of service provided every month. The report is expected to include, at a minimum, incident management and problem management performance against service levels. Upon fulfilment of the service request, the service desk must notify the user, ensuring that they are satisfied with the outcome, service request is properly documented, that any known problems are raised, and service request is formally closed.

- **Service level management**

The vendor shall be responsible for monitoring, reporting on, and maintaining service levels. This shall involve comparing actual performance with pre-defined expectations, determining appropriate actions, producing meaningful reports, conducting regular reviews with FSDT, and ensuring proactive measures for improvement are pursued and implemented.

Event	Description	Requirements	Target	Penalties
Priority level 1	Complete system failure affecting majority or all users	Meantime to response <2 hours	100% adherence to timelines	20% of the monthly invoice per incident
		Mean time to repair <4 hours	100% adherence to timelines	
Priority level 2	Partial system failure affecting specific users or system is functioning but in a degraded state	Meantime to response <2 hours	100% adherence to timelines	10% of the total monthly invoice per incident
		Mean time to repair <8 hours	100% adherence to timelines	
Priority level 3	Maintenance or approved enhancements	Meantime to response <2 hours	100% adherence to timelines	10% of the total monthly invoice per incident
		Meantime to repair as scheduled	100% adherence to timelines	

The consultant will work on the tasks assigned to her/him on a project or weekly basis and will be assessed against the same.

4. Penalty maximum limit and service disputes

- The maximum penalties for poor performance and other non-compliance with the contract will be limited to 20% of the total monthly invoice fees, per incident.
- Furthermore, should the 20% limit be reached four (4) times during the contract period, the FSDT reserves the right to immediately enter a service dispute that may result in the termination of the contract.
- Notwithstanding the aforementioned, and without prejudice to any other rights FSDT has, FSDT reserves the right to enter into service disputes at any point in time with the view of contract cancellation. During a service dispute, the service provider shall continue to render services in terms in accordance with these service levels.

- FSDT is currently using the following modules for the Sage 300 Premium Enterprise Resource Planning (ERP) – Version 2022. There are different numbers of users per module, however not limited to the numbers expressed below.

Item	Software module description	User per module
SAGE 300 Premium ERP – Version 2022	Accounts Payable	
	Administrative Service	
	Asset Management	
	Common Services	
	General Ledger	
	Project and Job Costing	
	Norming Resource Manager	
	Visual Process Flows	
	Sage 300 People	
	Sage CRM	

The implemented modules have varying degrees of customization undertaken to meet the needs of the FSDT

5. Reporting

The consultant will report to the FSDT HR and Corporate Service Manager on all matters concerning the assignment outlined under this contract.

Reports:

The consultant is expected to submit the monthly reports or working documents and materials as agreed under the SLAs, part of performance monitoring.

6. Additional requirements

A. Training/ skills transfer

FSDT prefers a train-the-trainer method to ensure internal capacity to operate and support the systems. Therefore, the successful service provider is expected to provide comprehensive Super User (SU) training that will see the Sus in a position to take over 1st line (functional) support, and the internal system administration team taking over 2nd line (technical) support after the first 6 months into the contract. Basically, the internal support teams must become independent of the service provider after the first 6 months of the contract.

B. Additional Reports

Development of various exceptions and other reports as and when required, especially during the audit periods. These may be created either under the SLA, or they may be

created via a proper change control process. Bidders must therefore quote their rates for work outside the support SLA, but must accept that the municipality may dictate that the surplus SLA hours must be used.

C. Change control

FSDT may, at times, make requests for modifications to any of the systems listed above. The successful bidder must have expertise and access to the source code to effect such changes or must conclude agreements with the listed systems' vendors for the provision of such services as and when requested by the FSDT. Therefore, bidders would have to quote their rates for work outside the SLA. Also, the successful bidder is expected to adhere to the FSDT's ICT System Change Management policy concerning any requests that may lead to modifications to the core system and 3rd party systems.

D. Proposed fee structure

Except as otherwise specified herein, The Consultant shall make written requests to FSDT for all payments as per actual man-days and hours spent on each deliverable (specified level of effort for a stated period of time) as and when they fall due, showing clearly the cost categories, i.e., man-hours, professional fees, and detailed Reimbursable.

The bidder is required to present a proposed billing structure that indicates hourly charges for the respective services request and this will be charged based on the level of personnel engaged. This will require the bidder to present updated CVs of the team members who will be engaged for this assignment.

E. License Management

The successful bidder must accept that they will be the FSDT's license management agent for the core system and the 3rd party systems and thus takes responsibility to alert the FSDT at least three months before expiry of licenses for each of the systems listed. The successful bidder will also bear responsibility to alert the FSDT of any license implications for any modifications to any of the software or host hardware upon receiving notification or request for such change.

License fees will be charged based on the Sage price list. The Service provider is to assist with facilitating the payment of the licenses for the one (1) year period.

7. Evaluation and Selection

Method used

Overall, the preferred bidder will be selected based on presenting the most economically advantageous tender. This means that bidders will be evaluated on a combination of technical and financial criteria. In this case, the ratio between technical and financial scores will be 60/40.

The technical component of each proposal will be scored first using a grid that assesses several key attributes. This is set out below:

Criteria	Sub criteria	Points
<p>Bidder relevant experience for the assignment: (To qualify for the points the service provider must submit signed reference letters obtained from the where they similar services) relevant organization provided</p>	<p>The reference letter must bear the letterhead of the organization where the Sage 300 (Accpac) support, maintenance, upgrade, training and development was provided. FSDT reserves the right to contact these organisations, without prior notice to the bidder.</p> <ul style="list-style-type: none"> • Bidder with four or more relevant reference letters of contracts of similar services = 40 points • Bidder with three relevant reference letters of contracts of similar services = 30 points • Bidder with two relevant reference letters of contracts of similar services = 20 points • Bidder with one relevant reference letters of contracts of similar services = 10 points • Bidder with no relevant reference letters of contracts of similar services = 0 points 	40
<p>Experience of bidder's Lead Consultant that will be assigned to the contract: (The bidder must attach Curriculum Vitae (CV) of the lead consultant to qualify for points)</p>	<p>The Curriculum Vitae (CV) and qualifications of the Lead Consultant will be used for allocation of points as follows:</p> <ul style="list-style-type: none"> • Lead consultant with 5 or more years' relevant 	40

	<p>experience on Sage 300 (Accpac) support, maintenance and development = 40 points</p> <ul style="list-style-type: none"> • Lead consultant with 4 years relevant working experience on Sage 300 (Accpac) support, maintenance and development = 30 points • Lead consultant with 3 years relevant working experience on Sage 300 (Accpac) support, maintenance and development = 20 points • Lead consultant with 2-year relevant working experience on Sage 300 (Accpac) support, maintenance and development = 10 points • Lead consultant with no relevant working experience = 0 points <p>NB</p> <p>The bidder must submit a list of all team members' credentials who will be involved in the project and specify the Lead Consultant.</p> <ul style="list-style-type: none"> • FSDT reserves the right to verify the authenticity of the qualifications 	
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Plan	The plan must include the training of FSDT staff and IT	20
To transfer skill and train FSDT staff and IT system developers on existing and new installations.	<p>system developers and transfer skills on existing and new installations.</p> <p>Plan should include the following:</p> <ul style="list-style-type: none"> • How the Standard Operating Procedures will be implemented = 10 points • Timelines = 5 points • How staff competence will be tested = 5 points • No Plan – (0 points) 	
Total Points		100

Minimum Scoring:

A bidder must have obtained a minimum of 80 points out of the total points for functionality to qualify to be evaluated on prices. After the functionality evaluation, the qualifying bids will be evaluated in accordance with the 80/20 preference point system.

The deadline for submission of the proposal documents is 5pm, 23rd March, 2026.

Any queries relating to this TOR should be submitted in writing to FSDT under the following address. All questions and the answers will be shared with all short-listed candidates. The deadline for any queries is 2 days before the tender submission deadline date.

Procurement Manager,
The Financial Sector Deepening Tanzania,
2nd Floor De Ocean Plaza,
Plot 400 Toure Drive,
P.O. Box 1559, Oyster Bay, Dar es Salaam, Tanzania
procurement@fsdt.or.tz

8. Other matters

8.1. Confidentiality

All information contained in the terms of reference and attachments is provided on a strictly confidential basis solely for the use of Tenderers in connection with a competition for the supply of services for the above contract. It is a condition of this competition that Tenderers (and any sub-contractors) shall:

- Take all reasonable measures to protect this confidentiality and avoid the unauthorized use, disclosure, publication, or dissemination of confidential information;
- not use this information other than for the purposes of preparation of a tender, and shall disclose it only to officers, directors, or employees on a specific need-to-know basis; and
- Not disclose, publish, or otherwise reveal any of the information contained herein except with the specific prior written authorization of FSDT.

8.2. Conflict of interest

Tenderers (and any sub-contractors) must disclose in their tender details of any circumstances, including personal, financial, and business activities that will, or might, give rise to a conflict of interest, if they were awarded this contract. Where Tenderers identify any potential conflicts, they should state how they intend to avoid such conflicts. FSDT reserves the right to reject any tender which, in its opinion, gives rise, or could potentially give rise to, a conflict of interest.

8.3. Taxation Matters

The winning bidder will be responsible for paying withholding tax and all other tax liabilities as per Tanzanian Tax laws. Any such tax amounts shall be the responsibility of the consultant