



TERMS OF REFERENCE

Recruitment of an IT Firm for the Microsoft 365 Transition and Long-Term Managed Services of Caritas Africa

Caritas Africa Regional Executive Secretariat (SERCAF) - Lomé, Togo

1. Background and Rationale

Caritas Africa is the regional directorate of the Caritas Internationalis confederation that supports the work of national Caritas organizations across the African continent. Reliable, secure, and modern digital tools are essential to its administrative coordination, programmatic collaboration, and stewardship of donor and partner relationships.

Caritas Africa has completed a digital maturity assessment that identified three priority areas for action: centralized governance and support for digital systems, cybersecurity and data privacy, and modernized infrastructure and remote access. In response, Caritas Africa is committed to two complementary improvements:

1. Maintain and continuously improve the operations of its existing IT systems and end-user devices.
2. Transition from its current hosted Exchange and on-premises file server environments to a modern Microsoft 365 Business environment, with the security, identity, and collaboration capabilities appropriate for a pan-African nonprofit.

To deliver these outcomes, Caritas Africa is recruiting a qualified IT firm under a single Terms of Reference structured as two contractually linked engagements: a time-bounded transition engagement followed by a longer-term managed services engagement. This structure separates the focused, milestone-driven work of moving to Microsoft 365 from the steady-state work of running the environment, while preserving continuity of the team and accountability across both.

2. Engagement Structure

This TOR covers two engagements:

- Phase A - Transition Engagement: a fixed-price, time-bounded program of approximately six months that delivers the migration to Microsoft 365 Business, the foundational identity and security configuration, and the initial period of stabilization.
- Phase B - Managed Services Engagement: a recurring service for an initial period of 24 months, renewable annually thereafter on satisfactory performance, that provides operational management, end-user support, security operations, and continuous improvement of the post-migration environment.

Bidders are required to submit one technical proposal covering both phases and two distinct financial proposals (Phase A as a fixed price, Phase B as a monthly recurring fee). Caritas Africa intends to award

both phases to the same firm to preserve continuity but reserves the right to award them separately if it determines that doing so represents better value.

Phase B will start only after formal acceptance of Phase A. Caritas Africa retains the right to terminate or pause the engagement at the acceptance gate of any Phase A sub-phase without penalty beyond the work already accepted.

3. Scope of Phase A - Transition Engagement

The Phase A engagement shall deliver the migration of Caritas Africa from its current hosted Exchange and on-premises file server environment to Microsoft 365 Business, with appropriate identity, security, and collaboration foundations in place. The firm shall plan and execute the engagement using a phased, gated approach as set out below.

3.1 Phase A Sub-phases and Indicative Timeline

#	Sub-phase	Indicative Duration	Primary Deliverables / Acceptance Criteria
A1	Discovery & Mobilization	4-6 weeks	Asset inventory, user inventory, current-state report, target-state design, migration plan, communications plan, signed mobilization charter
A2	Tenant Build & Identity Foundation	3-4 weeks	M365 tenant provisioned, domains verified, identity model implemented, MFA & conditional access policies enforced, security baselines configured, admin runbook produced
A3	Pilot Migration	3-4 weeks	Pilot group of 4-6 users migrated end-to-end (mailbox, OneDrive, Teams), success criteria signed off, lessons-learned captured, production migration plan refreshed
A4	Production Migration	8-10 weeks	All mailboxes migrated to Exchange Online, MX cutover completed, file server contents migrated to SharePoint and OneDrive, Teams rollout, legacy hosted Exchange decommissioned, EDM (Archive Hub) integration confirmed or migration path agreed
A5	Hypercare & Stabilization	4 weeks	Elevated support coverage, daily standups, defect log closed, knowledge transfer to Phase B service desk, formal Phase A acceptance, Phase B start authorization

3.2 Discovery & Mobilization (A1)

- Inventory of all end-user devices, peripherals, and shared equipment, including operating systems, age, license status, and condition.
- Inventory of all user accounts and mailboxes (active, shared, resource), distribution lists, and group memberships in the current hosted Exchange tenant.
- Inventory of file server volumes, shared folders, total data volume, file types, and access patterns; identification of orphaned or sensitive data.
- Confirmation of Microsoft Nonprofit eligibility and licensing pathway (TechSoup or direct), and procurement plan.
- Target-state design covering identity model, mail routing, file collaboration model (OneDrive, SharePoint, Teams), and security baselines.
- Migration plan with cutover sequencing, rollback approach, communications calendar, and risk register.

3.3 Tenant Build & Identity Foundation (A2)

- Provisioning of the Microsoft 365 tenant, verification of domains, configuration of DNS records (excluding final MX cutover, which is part of A4).
- Identity model implementation: cloud-only or hybrid as agreed in A1, with appropriate naming conventions and group structures.
- Multi-factor authentication for all active users; conditional access policies aligned with Caritas Africa risk appetite.
- Security baselines aligned with Microsoft secure score recommendations: anti-phishing, safe attachments, safe links, audit logging, retention defaults.
- Initial sensitivity label and data loss prevention policy framework, with a starter set of policies and a rollout plan handed to Phase B.
- Admin runbook and tenant configuration documentation.

3.4 Pilot Migration (A3)

- Selection of a pilot group of four to six users representing different roles and devices.
- End-to-end migration of pilot users including mailbox, OneDrive content, calendar, contacts, and Teams onboarding.
- Pilot success criteria signed off by Caritas Africa: mail flow, calendar integrity, search, mobile access, and offline access.
- Lessons-learned review and refresh of the production migration plan based on pilot findings.

3.5 Production Migration (A4)

- Wave-based migration of remaining users to Exchange Online, with per-wave communications and support.
- MX cutover and decommissioning of the legacy hosted Exchange environment after a defined coexistence period.

- Migration of file server contents to OneDrive (personal) and SharePoint (team and project sites) according to the target-state design, with permissions translated and validated.
- Teams rollout: standard channel structures, governance for team creation, guest access policies, and meeting hygiene.
- Confirmation of Archive Hub (or equivalent EDM) integration with the new environment, or, if agreed in A1, a separate migration plan for EDM content into SharePoint.
- Decommissioning plan and execution for legacy mail and file infrastructure, including secure data destruction certificates.

3.6 Hypercare & Stabilization (A5)

- Elevated support coverage with daily defect triage standups for the first two weeks following final cutover.
- End-user training delivered through a mix of live sessions and short video guides covering Outlook on the web, OneDrive, SharePoint, and Teams.
- Knowledge transfer from the Phase A delivery team to the Phase B operations team, with shared documentation, tenant runbook, and known-issue log.
- Formal Phase A acceptance signed by Caritas Africa, and authorization to start Phase B.

3.7 Acceptance Gates and Deliverables

Each Phase A sub-phase concludes with a formal acceptance gate. Caritas Africa shall not be required to authorize start of the next sub-phase, nor pay associated milestone fees, until acceptance criteria are met. Caritas Africa may, at any acceptance gate, decide not to proceed with subsequent sub-phases for any reason, in which case payment shall be due only for accepted work.

4. Scope of Phase B - Managed Services Engagement

Phase B provides the steady-state operation of the Caritas Africa IT environment from the day Phase A is accepted. Phase B builds on the documentation, processes, and configurations delivered in Phase A and shall be delivered against the service levels and key performance indicators set out in Section 5.

4.1 Service Desk and End-User Support

- Single point of contact for all IT incidents and requests, accessible by email, telephone, and web portal.
- Tiered support structure with documented escalation paths and ticket categories.
- Triage, classification, and resolution of incidents and service requests against agreed SLAs.
- On-site technical presence at the SERCAF premises in Lome at least twice per week (typically Mondays and Wednesdays) and additional days as required for incident response.
- Support for translation tools (DeepL, EditGPT, or equivalents) used by Caritas Africa, particularly for managing formats and glossaries.
- Support for the Archive Hub EDM platform users, including account administration and routine document management activities.

4.2 Endpoint and Device Management

- Maintenance of an accurate asset register covering all Caritas Africa end-user devices and shared peripherals.
- Standard device build, imaging, and provisioning for new staff.
- Patch management for operating systems and standard applications, with monthly compliance reporting.
- Endpoint protection (anti-malware, EDR) deployed and monitored on all managed devices.
- Device retirement, secure data wipe, and disposal in line with Caritas Africa policy.
- Routine maintenance and servicing of IT equipment, including peripherals and meeting room equipment.

4.3 Microsoft 365 Platform Administration and Security

- Day-to-day administration of identities, groups, mailboxes, SharePoint sites, OneDrive accounts, and Teams.
- Lifecycle management for users (joiners, movers, leavers) within agreed turnaround times.
- Continuous tuning of security baselines, conditional access, MFA, and DLP policies as risk and usage evolve.
- Monitoring of Microsoft secure score and compliance score, with quarterly improvement plans.
- Phishing simulation and security awareness campaigns at least twice per year.
- Management of backup, retention, and recovery policies, with periodic restoration tests.

4.4 Network, Hosting, and Infrastructure

- Monitoring of network connectivity at the SERCAF premises and supported sites, with proactive incident detection.

- Technical administration of website hosting services and the Caritas Africa public website, including security patching, certificate management, uptime monitoring, and content publishing support.
- Technical administration of digital communication accounts and platforms (Facebook, TikTok, and other institutional social media channels) limited to access management, integration, and platform-level support; content strategy remains with Caritas Africa communications staff.
- Management of Zoom licenses for specific external use cases (such as meetings requiring interpretation), in coordination with Microsoft Teams as the primary collaboration tool.

4.5 Reporting, Governance, and Continuous Improvement

- Monthly service report covering tickets, SLA performance, KPIs, security posture, and risks, delivered by the fifth business day of the following month.
- Quarterly business review with Caritas Africa leadership covering service performance, roadmap, and continuous improvement initiatives.
- Annual technology roadmap review aligned with Caritas Africa strategic plan and digital ambition.
- Maintenance of the asset register, configuration documentation, and runbooks.
- Active management of risk and change control, with formal records and Caritas Africa approval for significant changes.

5. Service Levels and Key Performance Indicators

The following service levels and KPIs apply to Phase B and to the Phase A hypercare period (A5). They form a contractual minimum; bidders may propose tighter targets in their technical proposal.

5.1 Incident Severity and Response Targets

Tier	Description	Response Time	Target Resolution	Coverage
P1 - Critical	Service down or affecting all users; major data loss risk	30 minutes	4 hours	24x7 including weekends
P2 - High	Significant service degradation; affecting a department or critical user (Executive)	1 business hour	8 business hours	Business hours + on-call
P3 - Medium	Single user impact with workaround available	4 business hours	2 business days	Business hours

Tier	Description	Response Time	Target Resolution	Coverage
P4 - Low	General request, query, change or enhancement	1 business day	5 business days	Business hours

5.2 Key Performance Indicators

Service	KPI	Target
Core M365 services (Exchange Online, SharePoint Online, OneDrive, Teams)	Monthly availability	>= 99.5%
Service desk	First response within SLA	>= 95%
Service desk	Resolution within SLA (P1-P3 weighted)	>= 90%
Service desk	User satisfaction (post-ticket survey)	>= 4.0 / 5.0
Endpoint management	Devices with current security patches	>= 95% within 14 days of release
Endpoint management	Devices with active endpoint protection	100%
Identity & access	MFA coverage for active users	100%
Backup & recovery	Successful backup verification	100% weekly
Reporting	Monthly service report delivered	By 5th business day of following month

5.3 Business Hours and Coverage

Business hours are 8:00 to 18:00 local time at SERCAF, Monday to Friday, excluding Caritas Africa public holidays. P1 incidents shall be covered 24x7. The firm shall provide an on-call contact for P1 escalation outside business hours.

5.4 Service Credits and Remediation

Failure to meet SLA targets in any given month shall trigger a service credit calculated as a percentage of the monthly recurring fee, on a sliding scale to be specified in the contract. Persistent SLA breaches over three consecutive months shall constitute grounds for termination for cause.

6. Governance and Roles

Effective delivery requires clear governance during both phases. The firm shall align with the structure below and propose any refinements in its technical proposal.

6.1 Caritas Africa Roles

- Project Sponsor: the Regional Executive Secretary or designated delegate. Owns scope and budget; approves acceptance gates.
- Project Manager: a single point of contact accountable for Caritas Africa side coordination, communications, and decision facilitation.
- Steering Committee: convened monthly during Phase A and quarterly during Phase B.

6.2 Firm Roles

- Engagement Manager: senior executive sponsor on the firm side, accountable for overall delivery and commercial relationship across both phases.
- Phase A Project Manager: leads day-to-day Phase A delivery; PMP, Prince2, or equivalent certification expected.
- Service Delivery Manager (Phase B): leads operational service after acceptance; accountable for SLAs, KPIs, and continuous improvement.
- Technical leads: identity and security, messaging and collaboration, endpoint and infrastructure.
- On-site engineer: provides regular on-site presence at SERCAF as defined in Section 4.1.

6.3 RACI Summary

Activity	CA Sponsor	CA PM	Firm PM/SDM	End Users
Approve scope, budget, and gates	A	R	C	I
Day-to-day project delivery	I	C	R/A	I
Risk and change control decisions	A	R	C	I
User communications and adoption	I	R	C	A
Migration execution	I	C	R/A	C
Steady-state service desk and incidents	I	I	R/A	C
Monthly service review	C	A	R	I
Quarterly business review	A	R	C	I

R = Responsible, A = Accountable, C = Consulted, I = Informed.

7. Services Not Included

The following are not included in the Phase A fixed price or the Phase B monthly fee, and shall be subject to separate quotation and prior approval:

- Purchase or replacement of IT equipment, peripherals, network hardware, or licenses beyond what is provided by Caritas Africa.
- Major IT transformation projects unrelated to the Microsoft 365 transition or to agreed continuous improvement initiatives.
- Custom application development.
- Special interventions requiring resources outside the agreed team profile.
- Travel to Caritas Africa member countries beyond the SERCAF premises.

Any such service shall be the subject of a written change request approved by Caritas Africa before work commences.

8. Required Firm Profile

Bidders shall demonstrate the following minimum qualifications:

- Registered legal entity in good standing, with a permanent presence in Togo or with a contractual partner that can guarantee on-site service in Lome.
- Microsoft Solutions Partner status or equivalent partnership credentials. Specializations relevant to Modern Work or Security are preferred.
- Demonstrated experience executing at least two Microsoft 365 tenant builds and Exchange Online migrations of comparable size in the last 24 months, with verifiable references.
- Experience providing managed IT services to nonprofit, multi-country, or international organizations.
- Qualified team members with current Microsoft, ITIL, and security certifications, including at least one identity and security specialist and one messaging and collaboration specialist.
- Demonstrated capability in cybersecurity, including incident response, vulnerability management, and data protection in line with Caritas Africa data privacy obligations.
- Capacity to handle and protect personal and beneficiary data in compliance with applicable data protection laws.
- Established service desk tooling for ticketing, asset management, and reporting.

9. Submission Requirements

Bidders shall submit a complete proposal package containing the following:

9.1 Technical Proposal

- Executive summary (maximum 2 pages).
- Understanding of the assignment and proposed approach for both Phase A and Phase B.
- Detailed Phase A migration methodology, including pilot strategy, cutover plan, rollback plan, risk management, and change control.

- Detailed Phase B service model, including service desk processes, ticket lifecycle, SLA management, and reporting cadence.
- Proposed team organization chart, with named individuals for the key roles in Section 6.2 and full CVs annexed.
- At least three reference engagements of comparable scope completed in the last 24 months, with client name, contact, period, and brief description.
- Tooling stack proposed for ticketing, monitoring, asset management, and reporting.
- Statement on data protection and confidentiality, including any sub-processors.

9.2 Financial Proposal

- Phase A: fixed price, broken down by sub-phase (A1 to A5), with milestone-based payment schedule aligned to acceptance gates.
- Phase B: monthly recurring fee, with all-inclusive scope as defined in Section 4.
- Hourly or daily rate card for services not included (Section 7).
- Validity period of the financial proposal of at least 90 days.

9.3 Mandatory Annexes

- Certificate of legal registration.
- Tax clearance certificate.
- Bank reference.
- Microsoft partnership status documentation, where applicable.
- CVs of all proposed team members.

10. Evaluation Criteria

Proposals shall be evaluated against the criteria and weights below. Bidders must achieve a minimum score of 70 out of 100 on the technical evaluation to be considered for financial evaluation.

Criterion	Weight	Notes
Technical proposal (total)	70%	
Methodology and migration approach	25%	Including risk management, rollback, change control
Proposed team and qualifications	20%	CVs, certifications (Microsoft, ITIL, security)
Microsoft 365 migration experience	15%	Verifiable references for similar tenant builds and Exchange-to-Exchange Online migrations
NGO / multi-country experience	10%	Experience working with nonprofit or pan-African organizations

Criterion	Weight	Notes
Financial proposal	30%	Phase A fixed price + Phase B monthly recurring fees evaluated separately
Total	100%	

11. Submission Instructions and Deadline

Applications must be submitted electronically on all business days between 8:30 a.m. and 5:30 p.m. to the following addresses:

- Email: recrutement@caritas-africa.org and secaf@caritas-africa.org, copying operationssupport@caritas-africa.org.
- Caritas Africa Regional Executive Secretariat located at 735, Boulevard des Armées, Lomé Tokoin Séminaire (Togo); Tel. +228 22 21 29 37.

The submission deadline is May 15, 2026, at 5:00 p.m. (Lomé local time). Late or incomplete bids will be rejected. For further information, please contact: (00228) 90 90 5956.

12. Final Provisions

- Caritas Africa reserves the right not to proceed with this call for proposals or to award only a portion of the engagement scope, without obligation or compensation to bidders.
- The selected firm shall be engaged through a formal contract incorporating this TOR, the accepted technical and financial proposals, the agreed SLAs, and standard Caritas Africa contracting clauses.
- All deliverables, documentation, and data produced under this engagement shall remain the property of Caritas Africa. The firm shall hand over all such materials at any time on request and at engagement closure.
- On expiry or termination of either engagement, the firm shall provide reasonable handover support to Caritas Africa or to a successor provider for a period of up to 60 days at no additional cost.
- Any dispute shall be resolved first through good-faith negotiation between the parties; failing that, through the dispute resolution mechanism set out in the contract.