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Request for Proposal - Migration from OpenERP to Odoo: Migration of database, Implementation, Hosting, and System Administration for Friends of the Earth International

Background and Context

Friends of the Earth International (FoEI) is the world's largest grassroots environmental federation with 70+ national member groups and millions of members and supporters around the world. FoEI's International Secretariat is based in Amsterdam and holds operational responsibility for the federation. The International Secretariat manages key operational aspects for the federation—including Fundraising, Grant Management, Membership Development, and Monitoring, Evaluation, and Learning (MEL) with the assistance of a legacy and customized module of OpenERP system. While this software system has served us well, the underlying architecture is outdated and is increasingly difficult to maintain, scale, or integrate with contemporary tools. To align with our principles of digital sovereignty, transparency, and operational efficiency, the Federation seeks to migrate to Odoo, the modern successor to OpenERP. We require a partner with specific expertise in OpenERP-to-Odoo migrations to manage the full lifecycle of this transition: hosting, system administration, core module implementation, and customized development (if required) for our specific grant-making and MEL workflows.

Project Objectives

1. Infrastructure: Migrate from the legacy OpenERP stack to a secure, renewable-energy-hosted Odoo instance.
2. Preserve Institutional Memory: Ensure zero loss of critical historical data during the migration from OpenERP to Odoo.

3. Streamline Grant and Sub-Grant Management: Automate (whilst also providing for flexibility and human intervention) the end-to-end grant cycle including prospect research, donor management, call for proposals and final reporting and financial reconciliation.

5. Database Location and Security: Host data on secure servers within EU with strict security measures and compliance as well as ISO certifications.

Scope of Work

The selected vendor will be responsible for four key workstreams:

Workstream A: Hosting and System Administration

- Infrastructure Setup: Provision and configuration of Odoo-compatible servers (Linux-based) with 100% renewable energy commitment if possible.
- Security & Compliance: Implement AES-256 encryption, regular automated backups (daily incremental, weekly full), firewall configuration, and compliance measures.
- Maintenance: Provide 24/7 uptime monitoring, monthly security patches, and performance optimization.
- Disaster Recovery: Establish a tested disaster recovery plan with a preferred Recovery Time Objective (RTO) of <24 hours and Recovery Point Objective (RPO) of <24 hour.

Workstream B: Core Module Implementation & Process Mirroring

The vendor will configure and customize (only when necessary) the following standard Odoo apps to mirror existing internal processes currently handled in a customized OpenERP environment:

1. Fundraising & CRM:

- Migrate and clean donor data from OpenERP.
- Configure donor segmentation (individuals, institutions etc.)
- Maintain donor database with tracking and monitoring options.
- Connect donor database to FOEI's project, reporting and grant lifecycles

2. Grant Management:

- Re-engineer Workflows: Analyze current OpenERP grant workflows and replicate/improve them in Odoo in a way that reflects FOEI's own processes and vocabulary.
- Call for Proposals: Create a portal for our member groups to submit proposals.
- Review Workflow: Configure multi-stage review processes (and approval flows) with role-based access.
- Sub-Grant Agreement & Disbursement: Provide a system that can allow staff to create templates and then use template-based generation of agreements and automated disbursement schedules linked to reporting, review and accounting. The system must also keep track of donor related information in active grants and link that to sub-grant projects to assist time tracking, schedule reminders and reporting requirements.
- Centralized system for approvals flows and signature.

3. Membership Management:

- Migrate member groups database from OpenERP.
- Configure membership related information (based on FOEI's categories and processes).
- Automate reminders for member groups to fill up and update their information on a timeline basis.
- Connect the member groups contact database to FOEI's grant and sub-grant management processes.

Workstream C: Data Migration (OpenERP to Odoo)

- Legacy Audit: Conduct a detailed audit of the existing OpenERP database to identify data structures, custom modules, and data quality issues.
- Mapping Strategy: Develop a comprehensive data mapping document linking OpenERP fields to Odoo data models.

- Migration Plan and Implementation: Plan and implement the migration of historical data and records strategically to maintain database links in the new system of Odoo.
- Validation: Perform a 100% reconciliation of financial, project, member groups data and critical records between the legacy system and the new Odoo instance.

Workstream D: Training and Change Management

- Process Documentation: Document the new Odoo workflows, highlighting differences from the old OpenERP processes.
- Training Materials: Develop user manuals and video tutorials for specific staff that rely on the system for their work: Admins (User and Access Management) and Users that require the system for their respective work.
- Workshops: Conduct at least 2 live training workshops for the staff at the international secretariat and for (non-secretariat) staff working at Friends of the Earth International.
- Support: Provide a 3-month post-go-live support period for bug fixes and minor adjustments.

Technical Requirements

- Odoo Version: Odoo Enterprise (preferably latest stable version)
- OpenERP Expertise: Vendor must demonstrate proven experience in migrating data and logic from OpenERP to modern Odoo.
- Integration: API development for integration with FOEI's NextCloud environment (preferable)
- Role-Based Access Control (RBAC): Granular permissions to ensure proper authorized access to data.
- Language Support: Interface and reports must support multiple languages.

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Deliverables

- Migration Plan: Detailed strategy for OpenERP-to-Odoo data mapping and migration.
- System Architecture Document: Diagram of hosting, security, and data flow.
- Configured Odoo Instance: Fully functional staging environment for user acceptance testing.
- Migrated Data: Complete transfer of historical data with validation report.
- Process Documentation: Comparison of old vs. new workflows.
- Training Materials: Manuals, videos, and recorded sessions.
- Go-Live Support: On-site/remote active support during the first 30 days.
- Source Code & Documentation: Full ownership of all custom modules, migration scripts, and configuration files.

Timeline

The project is expected to be completed within 4-6 months from contract signing.

Eligibility Criteria

Vendors must demonstrate:

- Minimum 7 years of experience implementing Odoo solutions.
- Proven Track Record of successful migrations from OpenERP modules to Odoo.
- Expertise in Grant Management and Reporting workflows (of social impact organizations/NGOs) within Odoo.
- Certified Odoo Partnerships (if applicable) and technical certifications.
- Commitment to data privacy principles.
- Experience working with decentralized or federated organizations.

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Proposal Submission Guidelines

Interested vendors should submit:

- Company profile, including background and relevant experience in providing similar IT services to nonprofit organizations.
- Description of technical expertise and qualifications of the team members who will be involved in the project.
- Technical Proposal: Understanding of OpenERP legacy challenges, proposed migration methodology, timeline, and team structure.
- Financial Proposal: Detailed breakdown of costs (implementation, licensing, hosting, training, support).
- References: Contact details for 3 past clients (preferably clients in the social impact sector), specifically highlighting migrations when applicable.
- Data Sovereignty Statement: Description of hosting infrastructure and data protection measures.

Evaluation Criteria

- Technical and Functional approach to Odoo migration and Implementation process
- Deep understanding of fundraising, grant management and reporting processes in the social impact sector
- Cost effectiveness, transparency and long-term sustainability factor in the proposal
- Data Security & Ethical Commitments
- Training & Support Plan

Submission and Contact Information

This Request for Proposals is not binding and does not create any contractual obligations between the organization and the service providers. The organization reserves the right to reject any or all proposals received if they do not meet the required criteria or are deemed unsuitable for our needs. All submitted proposals and accompanying documentation shall be treated as confidential and used solely for the purpose

of evaluation. The organization shall not be responsible for any costs or expenses incurred by the service providers in the preparation and submission of their proposals.

Please submit your proposal with subject line: Proposal for Migration and Implementation of Information Management System via email to hridija@foei.org by 7 November 2026. Should you have any questions or require further information, please do not hesitate to reach out to the same email address.

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