



DIVERSE*city*
community resources society

**Request for Proposal:
CRM System Replacement AND/OR Enhancement with
Support Services**

Date of Issue: August 18th, 2025

Submission Due Date: September 12th, 2025

Expected Award Date: October 17th, 2025

Inquiries and Proposals to be directed to:

Ian Robinson, Chief Financial Officer: cfo@dcrs.ca



About DIVERSEcity

A registered charity in BC since 1978, **DIVERSEcity Community Resources Society** strengthens communities by helping people build the life they want with inclusive programs and services, while working together with community partners to advance change for an equitable and sustainable world.

DIVERSEcity recognizes that our work takes place on the ancestral, traditional and unceded territories of the SEMYOME (Semiahmoo), ǫ́icǫ́y (Katzie), kʷikʷəłəm (Kwkwetlem), ǫ́ʷa:ńłəń (Kwantlen), qiqéyt (Qayqayt), xʷməθkʷəy̓əm (Musqueam) and s̓c̓əwaθən məsteyəxʷ (Tsawwassen) First Nations. The knowledge, traditions and ongoing contributions of these communities are significant in providing context to the work we do, and DIVERSEcity recognizes the importance that reconciliation has in building truly inclusive and strong communities.

Background

With over 45 years of service as a B.C. social services organization, DIVERSEcity Community Resources Society has built a strong reputation for fostering equitable access to essential services for culturally and linguistically diverse communities. For 27 of those years, we have specialized in language services, including interpretation, translation, and English language learning, supported by clinical and case-managed programs.

As a Buy Social Canada–certified social enterprise, our Interpretation and Translation Services reinvest revenues directly into DIVERSEcity’s charitable programming for newcomers and diverse populations. This reinvestment model ensures that language access remains a central pillar of our equity-driven mission.

Over the past three years alone, DIVERSEcity has successfully fulfilled over 37,600 interpretation requests. We work with a network of 578 interpreters the majority being cultural minority members.

DIVERSEcity delivers services in collaboration with a wide range of partners, including provincial ministries, municipal governments, health and justice agencies, Indigenous and Métis organizations, community-based service providers and private sector clients.

This legacy of complex, high-volume, and community-driven service delivery underscores our need for a robust, integrated CRM system. A modern CRM will enable us to better manage interpreter assignments, track service metrics, generate reports, and enhance coordination with clients and contractors — ultimately strengthening the outcomes we deliver for communities across British Columbia.

[Learn more at dcrs.ca.](https://dcrs.ca)



Contents

1. Introduction	4
2. Objective	4
3. Scope of Work	5
3.1 Functional Requirements	5
3.2 Integration Requirements	5
4. Bidder Qualifications.....	6
5. Length of Engagement	6
6. Proposal Content	6
7. Proposal Evaluation	7
8. Submission Deadline.....	7
9. General.....	8
10. Appendices	9



1. Introduction

DIVERSEcity Community Resources Society is seeking proposals from qualified vendors to either replace or enhance its existing Sage CRM system, depending on the solution that best meets the organization's operational, technical, and strategic requirements.

This initiative aims to modernize and streamline client service operations; enhance usability, automation, and reporting capabilities; improve integration with the organization's ERP and other business systems; and ensure compliance with Canadian data privacy and residency legislation. The selected solution will establish a scalable, secure, and future-ready CRM environment that supports DIVERSEcity's mission, service delivery model, and long-term growth objectives.

2. Objective

DIVERSEcity Community Resources Society is issuing two coordinated but separate Requests for Proposal (RFPs) as part of a broader initiative to modernize its enterprise systems:

- RFP for the Customer Relationship Management (CRM) solution.
- RFP for Sage 300 ERP support and reporting enhancements.

This RFP pertains specifically to the CRM component, with the objective of replacing or enhancing the existing platform to better support client service delivery, operational efficiency, and organizational growth. Vendors may respond to this RFP independently or, if capable, submit a combined proposal that addresses both the CRM and ERP requirements.

The selected solution must:

- Replace or enhance the current CRM platform.
- Improve workflows for client intake, service coordination, and translator/interpreter scheduling.
- Strengthen internal communication and collaboration through role-based access controls and real-time notifications.
- Reduce manual processes through automation and configurable tools that enhance usability.
- Ensure data security, privacy, and compliance with Canadian data residency requirements.
- Enable integration with Sage 300 ERP and other enterprise systems.
- Support data-driven decision-making through robust, real-time, and customizable reporting.



- Provide scalability to extend CRM functionality into other business areas beyond interpretation and translation services.

3. Scope of Work

Refer to Appendix A (Desired ERP Capabilities and System Vision), B (Functional and technical Gap Assessment) & C (Sample Workflows and Reporting Requirements) for detailed operational workflows and reporting requirements relevant to the proposed ERP solution. Supporting Documents will be available upon request and completion of NDA agreement.

3.1 Functional Requirements

The proposed solution must:

- Provide the ability to integrate with Sage 300 ERP and other potential future ERP platforms.
- Offer customizable workflows for intake, service coordination, and interpreter/translation management.
- Implement role-based access controls that meet departmental needs and privacy requirements.
- Automate key functions including invoicing, notifications (for clients, interpreters, and internal staff), and task management.
- Include integrated document management for uploading, storing, and retrieving service records.
- Support cloud-hosted or hybrid deployment with Single Sign-On (SSO) capability.
- Comply with Canadian data privacy and residency legislation, including applicable federal and provincial requirements.
- Provide configurable dashboards and in-system revenue and service reporting capabilities.
- Enable migration of client and service history from the existing CRM.
- Provide comprehensive user training and documentation for administrators and frontline staff.
- Offer a secure, mobile-accessible interpreter self-service portal supporting functions such as job acceptance, schedule management, and document uploads.

3.2 Integration Requirements

The proposed solution must:

- Support real-time or scheduled data synchronization with Sage 300 ERP.
- Enable unified reporting using data from both CRM and ERP sources.
- Offer open API support or be compatible with middleware for third-party integrations.
- Integrate with analytics and performance monitoring tools to support advanced reporting and business intelligence.



4. Bidder Qualifications

DIVERSEcity Community Resources Society is seeking a vendor with demonstrated expertise in CRM implementation or enhancement, preferably within nonprofit, public sector, or social enterprise environments.

The proponent must meet the following minimum qualifications:

- Proven track record in replacing or enhancing CRM systems to support efficient, mission-aligned service delivery and program operations.
- Proficiency in data migration, systems integration, and change management, with a focus on minimizing disruption to ongoing operations.
- Strong project management capabilities, including the ability to work effectively with cross-functional teams and multiple stakeholders.
- Capacity to deliver tailored training, onboarding programs, and user-friendly support documentation for administrators, frontline staff, and other end-users.
- Demonstrated experience in security and privacy best practices, including compliance with Canadian data residency and privacy legislation.
- A dedicated support team to ensure system stability, timely issue resolution, and responsiveness post-implementation.

5. Length of Engagement

The initial term of the engagement will be for one year. The agreement may be renewed, by mutual written consent, for up to two consequent one-year terms, contingent upon satisfactory performance, quality of support services, and evolving organizational need.

6. Proposal Content

Proposals should not exceed ten (10) pages in length and must include, at a minimum, the following information:

- Provide an overview of the proponent's firm, including relevant CRM experience in nonprofit, public sector, or social enterprise environments.
- Confirm professional independence with respect to DIVERSEcity.
- Provide references from comparable organizations that demonstrate the vendor's capacity to deliver reliable, sustainable CRM solutions.
- Describe the proposed approach for replacing or enhancing the current CRM system, including the rationale for technology or platform selection.
- Outline a detailed data migration and testing plan, including validation processes and risk mitigation strategies.



- Detail the proposed approach to user training, onboarding, and ongoing support for CRM users.
- Describe any additional services or features that may provide long-term value to DIVERSEcity.
- Provide a comprehensive cost proposal covering licensing, implementation, training, and ongoing support.
- Be prepared to demonstrate relevant system features in a secure demo environment or sandbox portal upon request, to validate proposed functionalities and user workflows.

Proponents are encouraged to review Appendix A (Desired CRM Capabilities and System Vision), Appendix B (Functional and Technical Gap Assessment), Appendix C (Workflows and Reporting Requirements), and Appendix D (Data Migration Considerations) to fully align their proposal with DIVERSEcity’s operational context and needs. Supporting Documents will be available upon request and completion of NDA agreement.

7. Proposal Evaluation

Your proposal will be assessed by a selected group of senior internal employees that will apply a weighted score across various categories as follows:

Category	Percentage Weighting
Alignment with DIVERSEcity’s scope and objectives	10%
Technical fit and future scalability	20%
Demonstrated understanding of nonprofit operational needs	5%
Fee structure and transparency in costing proposal	20%
Ability to deliver as a long-term strategic and sustainable business partner	10%
Quality of implementation strategy and risk mitigation	20%
Overall approach and responsiveness to the RFP	5%
Capacity to take on both RFPs	10%
Total	100%

Shortlisted proponents can expect to be invited to participate in an in-person meeting to demonstrate their proposed solution and its capabilities.

8. Submission Deadline

Please submit your response to this request for proposal no later than 12 pm noon (Pacific Standard Time) on September 12th, 2025. Proposal documents should be submitted electronically to:



Ian Robinson
Chief Financial Officer
Email: cfo@dcrs.ca
Direct Line: 604-306-9486

9. General

This RFP is not a tender and does not commit the Society in any way to select a preferred bidder, or to process to negotiations for a contract, or to award a contract. The Society reserves the right to, at any time, for any reason, reject all proposals, terminate the RFP and proceed with obtaining the services in an alternative manner.

Notwithstanding any other section of this RFP or any practice or custom of the trade or industry, the Society, in its discretion, reserves the right to, at any time, do any or all of the following:

- a) Accept any proposal;
- b) Disqualify a bidder from this RFP;
- c) Reject any proposal for any reason, including without limitation if in the Society's view the proponent does not have sufficient experience performing the services;
- d) Reject all proposals for any reason, terminate this RFP process and, if the Society elects, obtain or proceed, with the services in some other manner, including conducting a new procurement process;
- e) Accept a proposal which is not the lowest cost proposal even if the lowest cost proposal conforms in all respects with the requirements set out in this RFP, and
- f) Not proceed to review and evaluate, or discontinue the evaluation of, any proposal.

The Society may, in its discretion, reject any proposal which fails to confirm to or includes qualification to the requirements of this RFP, which is materially incomplete, obscure or irregular, which contains exceptions or variations, or which omits any material information required to be submitted. Notwithstanding anything to the contrary in this RFP, the Society may in its discretion retain any such proposal for consideration and may waive any or all of the foregoing, on such terms and conditions as the Society may consider appropriate, and consider such proposal in the same manner as proposals that fully conform to the requirements of this RFP without qualification.

By submitting a proposal, each bidder agrees that the Society and its employees, advisors and representatives will not under any circumstances be liable for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the bidder in preparing and submitting a proposal, participating in this RFP process or other activity related to or arising out of this RFP process, including if the Society for any reason cancels this RFP process, rejects any or all proposals, accepts any compliant or non-compliant



proposal or breaches any duty of fairness, express or implied term of the proposal documents or other duty to the bidder. Bidders are solely responsible for all costs whatsoever incurred by the bidder in connection with preparing and submitting a proposal and negotiating a contract.

10. Appendices

- Appendix A: Desired CRM Capabilities and System Vision
- Appendix B: Functional and Technical Gap Assessment
- Appendix C: Sample Workflows and Reporting Requirement
- Appendix D: Data Migration Considerations
- Appendix E: DIVERSEcity Strategic Plan
- Appendix F: Confidentiality and Non-Disclosure Agreement

Supporting Documents will be available upon request and completion of NDA agreement.