



## **Request for Proposal:**

# **Support Contract and Reporting Enhancements for Sage 300 ERP**

**Date of Issue: August 18<sup>th</sup>, 2025**

**Submission Due Date: September 12<sup>th</sup>, 2025**

**Expected Award Date: October 17<sup>th</sup>, 2025**

**Inquiries and Proposals to be directed to:  
Ian Robinson, Chief Financial Officer: [cfo@dcrs.ca](mailto: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), q̓íçəy̓ (Katzie), k̓wík̓wə́ləm (Kwikwetlem), q̓w̓a:n̓l̓ə́n (Kwantlen), q̓iq̓éyt (Qayqayt), x̓m̓əθk̓w̓ə́y̓əm (Musqueam) and s̓c̓əwaθən məsteyəx̓w (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

We support people and communities by providing resources, education and training, creating pathways for all to be a part of connected, stronger and healthier communities. Our organization is committed to providing opportunities for all British Columbians to ignite their individual potential, fostering a sense of belonging and building a future that protects the earth and guarantees equity for all.

Representation and lived experiences matter when it comes to delivering on our strategy; we commit to a compassionate and thoughtful approach that includes the experiences of individuals and communities. To this end, our work is led by a team of more than 500 staff and volunteers dedicated to delivering on our vision. With more than four-and-a-half decades of experience, we've refined our approach, yet remained nimble, allowing us to responsively address emerging community trends and needs with compassion and care.

We began our story in the City of Surrey, now the second-largest city in British Columbia with a population nearing 600,000. The city is located within Metro Vancouver and bordered by the United States to the south, the City and Township of Langley to the east, the Fraser River to the north and the Cities of Delta and White Rock to the west. Working in collaboration with community partners, we now offer services in multiple regions across the province.

Working within one of the fastest growing and most diverse regions in Canada has instilled innovation in everything we do. From Indigenous communities to the business sector and government, our ecosystem of partners is as diverse as the communities we serve and enables us to deliver collective impact through collaboration.



### Financial and Operational Disclosures

The Society was incorporated under the Society Act of British Columbia. The Society has Registered Charity status with the Canada Revenue Agency and thus is exempt from income taxes under section 149(1) of the Canadian *Income Tax Act*.

Financial statements are prepared in accordance with Canadian Accounting Standards for non-profit organizations set out in Part III of the CPA Canada Handbook – Accounting.

Internal financial statements are completed on a monthly basis and the Finance and Audit Committee are provided with internal statements six times per year at each Committee meeting.

The annual operating budget for the Society is close to \$30 million. Accounting, budgeting and financial reporting is completed through the Sage 300 accounting platform.

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



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## 1. Introduction

DIVERSEcity Community Resources Society is inviting qualified vendors to submit proposals for a new support contract for its current Enterprise Resource Planning (ERP) platform, Sage 300, along with targeted system enhancements to better support the organization's operational, financial and compliance needs.

This initiative aims to strengthen DIVERSEcity's back-office operations by improving system usability, integration, and automation; enhancing visibility, accuracy, and efficiency in financial workflows and payroll tracking; and expanding the depth and flexibility of financial and operational reporting.

This RFP is focused solely on ERP system support and reporting enhancements. A separate RFP related to CRM system modernization is being issued concurrently for vendors with broader implementation capabilities.

## 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 focuses on a new support contract for the current Sage 300 ERP system and delivery of targeted enhancements that strengthen financial management, operational efficiency, and integration capabilities. Vendors may respond to this RFP independently or, if capable, submit a combined proposal that addresses both the CRM and ERP requirements.

The objectives of this engagement are to:

- Establish a stable, responsive, and SLA-driven support agreement for the Sage 300 ERP environment.
- Enhance financial and program reporting to improve visibility, accuracy, and usability for decision-making.
- Streamline finance-related modules, including Accounts Payable, Accounts Receivable, and General Ledger.
- Enable secure, centralized, and role-based access to ERP data across relevant departments.
- Introduce automation and customization features to reduce manual effort and improve productivity.



- Support future integration with CRM and other enterprise systems to improve data flow, automation, and unified reporting.

### 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 ERP System Requirements

The proposed solution must:

- Provide streamlined, role-based, and secure access for finance and administrative users.
- Enable automation of repetitive tasks such as invoice generation, recurring journal entries, and scheduled reporting.
- Support enhanced integration with the CRM to enable cross-system workflows.
- Offer customizable financial reporting tailored to funder, project, and program requirements.
- Centralize invoice processing, reconciliation, and audit tracking within the ERP.
- Maintain a scalable system architecture with the capability to securely migrate historical data from Sage 300 if required.
- Support configuration and extension of existing ERP modules to meet reporting, budgeting, and cost-tracking needs.
- Be API-ready or include integration tools to enable future connectivity with the CRM or other third-party platforms.

#### 3.2 Integration Requirements

The proposed solution must:

- Ensure data compatibility with the current or future CRM platform.
- Enable unified reporting by leveraging shared client, project, and financial data across systems.
- Support secure API- or middleware-based integration for data exchange.
- Maintain compatibility with external analytics and dashboarding tools for advanced reporting.

### 4. Bidder Qualifications

DIVERSEcity Community Resources Society is seeking a qualified vendor with demonstrated expertise in supporting and enhancing Sage 300 ERP environments, preferably within nonprofit, public sector, or social enterprise settings.

The proponent must meet the following minimum qualifications:



- Proven track record in providing ongoing support, system optimization, and reporting enhancements for Sage 300 or comparable ERP systems.
- Proficiency in customizing financial and program reports, integrating ERP with CRM or other enterprise systems, and optimizing workflows for efficiency and accuracy.
- Strong project management and communication skills to collaborate effectively with finance, operations, and IT teams.
- Demonstrated ability to deliver secure, scalable, and low-disruption improvements to existing ERP environments.
- Experience with security, compliance, and audit requirements relevant to ERP data in the Canadian nonprofit sector.
- Availability of a dedicated support team with defined service levels and escalation processes for ongoing maintenance and enhancements.

## 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 experience providing support and reporting enhancements for Sage 300 ERP or comparable systems in nonprofit, public sector, or social enterprise settings.
- Confirm professional independence with respect to DIVERSEcity.
- Provide references from similar organizations that demonstrate the vendor's ability to act as a strategic and responsive ERP partner.
- Describe the recommended approach for delivering a support model and implementing targeted reporting enhancements within the existing Sage 300 environment.
- Outline your team's capabilities related to financial reporting customization, workflow optimization, and system integration.
- Describe any additional services or recommendations not explicitly listed in this RFP that may offer long-term value to DIVERSEcity.
- Detail options for providing staff training or reporting documentation to internal finance or program teams.
- Provide a detailed cost proposal, including support contract terms, reporting enhancement services, and any optional features.



- 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 ERP Capabilities and System Vision), Appendix B (Functional and Technical Gap Assessment) and Appendix C (Workflows and Reporting Requirements) 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 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	10%
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	20%
<b>Total</b>	<b>100%</b>

*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 12<sup>th</sup>, 2025. Proposal documents should be submitted electronically to:

Ian Robinson  
Chief Financial Officer  
Email: [cfo@dcrs.ca](mailto: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 ERP Capabilities and System Vision
- Appendix B: Functional and technical Gap Assessment
- Appendix C: Sample Workflows and Reporting Requirements
- Appendix D: DIVERSEcity Strategic Plan
- Appendix E: Confidentiality and Non-Disclosure Agreement

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