

REQUEST FOR PROPOSAL

**RFP NO. FIN 26-01 Enterprise Resource Planning
(ERP) Consulting Services**

DATE OF ISSUE: July 22, 2026

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1. SUMMARY

The Township of Esquimalt (the “Township”) is seeking proposals from qualified consultants to provide ERP consulting services to assist with the procurement and implementation planning of a modern ERP system. The consultant will lead strategy development, requirements gathering, RFP creation, evaluation, and vendor selection. Proponents shall familiarize themselves with all aspects of the work required for this RFP and the area to be studied. Further information is contained in the Scope and Deliverables section of this document.

2. INFORMATION FOR PROPONENTS

Closing Location, Date and Time

- Proposals must be received at the Township of Esquimalt Municipal Hall, 1229 Esquimalt Road, Esquimalt, B.C., V9A 3P1, by: 3:00 p.m. PST on Monday, August 10th, 2026.
- Proponents shall submit two (2) original hard copies and one (1) USB key copy prepared in .PDF format. The Proposal should be enclosed and sealed in an envelope/package clearly marked “RFP for ERP Consulting Services”. No other information should be marked on the outside of the envelope/package.
- Late Proposals will not be considered and extensions will not be granted.
- Proposals will not be opened in public.

Please note:

- It is the sole responsibility of the Proponent to ensure the Township receives their Proposal prior to the closing time and date. All costs to prepare the Proposal shall be borne solely by the Proponent.
- The computer clock in the offices of the Township of Esquimalt determines the official closing time for this RFP.
- Facsimile (fax) or e-mail Proposals for this RFP will not be accepted.
- Delivery of the RFP by a courier service shall be the responsibility of the Proponent and will be rejected if the envelope/package is delivered to a location other than which is stated in the RFP and the envelope/package fails to be delivered to the Township prior to the closing date and time.

Communications and Enquiries

All enquiries regarding this RFP are to be directed in writing by email to the following contact person and department. Information obtained from any other source is not official and should not be relied upon as factual or accurate. All enquiries and responses will be recorded and will be distributed directly to the BC Bid website.

Attn: Ian Irvine, Director of Financial Services and IT
Email: finance@esquimalt.ca
Telephone: 250-414-7141

Questions are to be submitted in writing before 4:00pm PST on July 31st, 2026. The Township reserves the right not to answer questions received after this date.

The Township will attempt to respond to all reasonable inquiries but reserves the right not to respond. Proponents finding discrepancies or omissions in the RFP documentation or having doubts as to the meaning or intent of any provision should immediately notify the contact person listed above. If the Township determines that an amendment to the RFP is required, the Township will issue an addendum, and such addendum will be posted on the BC Bid and Township's websites.

No oral conversation will affect or modify the terms of this RFP or may be relied upon by the Proponent.

Addenda

All addenda, amendments, or further information regarding this RFP will be published on the BC Bid and Township of Esquimalt websites. Each addendum will be incorporated into and become part of the RFP. It is the sole responsibility of the Proponent to monitor the BC Bid website regularly to ensure that they have received all updates.

3. TERMS AND CONDITIONS

Acceptance and Rejection of Proposals

This RFP is not an agreement to purchase goods or services. The Township is not bound to enter into a Contract with any Proponent. The Township reserves the right to:

- Not accept any Proposal in response to this RFP;
- To reject any and all Proposals, including without limitation the lowest priced Proposal, even if the lowest priced Proposal conforms in all aspects with the RFP;
- To reject any Proposal at any time prior to execution of a Contract;
- To reject Proposals which are incomplete, conditional or obscure or contain erasures or alterations of any kind;
- To waive immaterial defects and minor irregularities in any Proposal;
- To assess the ability of the Proponent to perform the Contract and reject any Proposal where, in the Township's sole estimation, the personnel and/or resources of the Proponent are insufficient.

Cost of Proposal

The Proponent shall assume all costs related to the preparation and drafting of their Proposals and the Township shall, under no circumstances, be liable to compensate respondents for such costs.

Changes to Proposal Wording and Content

The Proponent will not be allowed the opportunity to change the wording or content of its Proposal after closing and no words will be added to the Proposal, including changing the intent or content of the presentation of the Proposal, unless requested by the Township (e.g. minor clarifications).

Withdrawal of Proposal

The Proponent may withdraw their Proposal at any time prior to the Proposal closing time by submitting a written withdrawal letter to the Director of Financial Services and IT via email at: finance@esquimalt.ca

Ownership of Proposal

All Proposals submitted, other than any Proposal withdrawn prior to the opening of Proposals or any late Proposals, become the property of Township and will not be returned to Proponents.

Liability for Errors

While the Township has used considerable effort to ensure an accurate representation of information in this RFP, the information contained is supplied solely as a guideline for Proponents. The information is not guaranteed or warranted to be accurate by the Township, nor is it necessarily comprehensive, exhaustive or up to date. Nothing contained in this RFP is intended to relieve Proponents from forming their own opinions and conclusions with respect to the Services in this RFP.

No Obligation

This RFP is not a tender and does not commit the Township in any way to select a Leading Proponent or to proceed to negotiations for a Contract, or to award a Contract to any Leading Proponent, and the Township reserves the right at any time to reject all Proposals, terminate this RFP process and, if the Township elects, obtain or proceed with obtaining the Services in some other manner, including by advertising for new Proposals.

No Claims

The Township and its representatives, agents, consultants and advisors will not be liable to any Proponent for any claims, whether for costs, expenses, losses or damages, or loss of anticipated profits, or for any other matter whatsoever, incurred by the Proponent in preparing and submitting a Proposal, or participating in negotiations for a Contract, or other activity related to or arising out of this RFP.

Right to Cancel the RFP Process

The Township reserves the right in its sole discretion to postpone or cancel this RFP process at any time and may, in its discretion, elicit offers from other parties (whether or not such parties have responded to this RFP) or engage in another procurement process, including re-issuing a substantially similar RFP or negotiating with any party if:

- Only one Proposal is received;
- A suitable Proponent has not been selected;
- Approval is not granted by the Township of Esquimalt Council, the Chief Administrative Officer or the Director of Financial Services and IT;
- All Proposal(s) exceed the Township's set budget; or
- Contract negotiations have not been reached within a reasonable time as solely determined by the Township.

Conflict of Interest

By submitting a Proposal, the Proponent warrants that neither it nor any of its officers or directors, or any employee with authority to bind the Proponent, has any financial or personal relationship or affiliation with any elected official or employee of the Township or their immediate families which might in any way be seen by the Township to create a conflict.

Lobbying

If any director, officer, employee, agent, or other representative of a Proponent makes any representation or solicitation to any Mayor, Councillor, officer, or employee of The Township with respect to the Proposal, whether before or after the submission of the Proposal, The Township shall be entitled to reject or not accept the Proposal.

4. DEFINITIONS

Throughout this RFP, the following definitions are used:

“Addenda” means all additional information regarding the RFP, including amendments to the RFP.

“Township” means the Township of Esquimalt.

“Closing Location” includes the location or email address for submissions indicated in Section 2 of this RFP, or BC Bid, as applicable.

“Closing Time” means the closing time and date for this RFP as set out in Section 2 of this RFP.

“Consultant” means the successful proponent to the RFP who enters into a written contract with the Township of Esquimalt.

“Contract” means the written agreement resulting from the RFP, executed by the Township of Esquimalt and the Consultant.

“Must” means a mandatory requirement to be met for a Proposal to receive consideration.

“Project Manager” means the person in charge of the planning and execution of the project.

“Proponent” means an individual or company that submits, or intends to submit, a Proposal in response to this RFP.

“Proposal” means the proponent’s submission in response to this RFP.

“Request for Proposal” or RFP means the solicitation described in this document, including any attached or referenced appendices, schedules and addenda.

“Services” means and includes the provision by the consultant of all services, duties and expectations as further described in this Request for Proposals.

“Shall” means a mandatory requirement to be met for a Proposal to receive consideration.

“Should” means a desirable requirement that has a significant degree of importance to the objectives of the RFP.

“Work” means any labour, efforts, and/or duty required to accomplish the purpose of this project.

5. INTRODUCTION

The Township of Esquimalt requires the services of a consulting firm or individual who can lead the procurement process and related activities to replace the end-of-life ERP Financial System, Microsoft Dynamics GP. The replacement ERP solution will have a modern interface and architecture, likely be cloud-based, and meet the needs of the Township of Esquimalt now and in the future. The consultant will work with Township staff and potentially other consultants to assist with the following suggested phases of the ERP Procurement project:

- Develop a procurement strategy and lead the procurement process;
- Review the existing system; identify deficiencies and best practices;
- Develop the ERP replacement requirements and finalize procurement documentation;
- Develop an evaluation process for submissions received;
- Review submissions from vendors;
- Shortlist and facilitate vendor demonstrations and discovery;
- Assist in selection of the replacement solution; and.
- Assist in contract negotiations with the preferred vendor.

6. BACKGROUND

The Township of Esquimalt, located on southern Vancouver Island, is a vibrant and growing community. In 2023, Esquimalt's estimated population was approximately 18,000, and current population projections and housing developments indicate that Esquimalt will continue to grow steadily for the foreseeable future.

For over 20 years, the Township has used Microsoft Dynamics GP software (with vendor formerly Diamond Software, now Central Square, providing to support Canadian Payroll, Accounts Payable, Purchasing, Accounts Receivable, and Bank Reconciliation. Integrated solutions currently include Tempest, Management Reporter, PerfectMIND, HRISMyWay, and Citywide Budgeting.

As Microsoft has set a deadline of 2029 for sunseting support on this core ERP software, the Township is looking to replace/modernize its core financial software. An inclusion of Human Capital Management (HCM) functions in the ERP replacement software is desirable for our HR Department if budgetary constraints allow. Including functionality to allow self-service where possible is beneficial.

7. SCOPE AND DELIVERABLES

In Scope

The Consultant will use their experience and expert knowledge of ERP systems, procurement and implementation to provide the following services:

- a. Work with the project team to lead in defining the ERP replacement procurement strategy and approach;
- b. Review the current legacy ERP system and identify gaps in current capabilities;
- c. Validate system requirements by leading workshops with line-of-business staff;
- d. Conduct future state visioning with the project team;
- e. Identify crucial success factors and evaluation criteria for the ERP Replacement procurement;
- f. Develop technical requirements for the ERP replacement procurement;
- g. Assist in the development of the ERP replacement procurement evaluation mechanism;
- h. Assist with the evaluation and analysis of the ERP replacement proposals to shortlist preferred vendors;
- i. Facilitate scripted demos & detailed discovery of the shortlisted vendors;
- j. Facilitate price negotiation & vendor selection;
- k. Work with the project team to review contract deliverables and service levels; and
- l. Assist during the contract negotiation process with the preferred vendor.

The Consultant may propose changes and/or additions as required.

Potential In Scope

The Township of Esquimalt reserves the right to negotiate additional services from the consultant to provide advice and support during the implementation of the software to ensure project success.

Location of Work

This engagement requires the consultant to be on-site for the kick off meeting. All other information gathering meetings required for In Scope work can be discussed with the Township as to whether they are done in person or remotely.

Deliverables

The Township of Esquimalt expects several deliverables as part of this engagement. These deliverables may be refined or adjusted upon mutual agreement between the Township and the Consultant, based on the finalized ERP procurement strategy:

1. Procurement Strategy and Roadmap
2. Detailed Requirements Specification
3. Finalize ERP Procurement Documentation
4. Evaluation Scorecard and Shortlisting Assistance
5. Facilitation of Vendor Demonstrations
6. Recommendation of Preferred Vendor
7. Accepted Contract with Preferred Vendor

8. PROJECT TIMELINE

The Township has established a preliminary schedule which results in an accepted contract and implementation schedule with the approved vendor no later than May 2027. All established dates are subject to change at the discretion of the Township.

9. PROPOSAL FORMAT

Cover Letter

Provide a single-page, dated cover letter that includes the name, address, telephone number, and title and signature of the Proponent's contact person for this Proposal.

Corporate Profile and Qualifications

Proponents must include a brief summary of their company's background, area of expertise, qualifications and number of employees. Proponents shall list any subcontractors or sub-consultants they intend to use and provide a similar summary. Proponents shall include at least five (5) project abstracts that clearly outline previous projects with similar services.

The referenced projects shall be of a similar or greater cost and magnitude which have been successfully completed by their company within the three (3) years. At least one (1) of the referenced projects should be a municipal or regional government. The project abstracts shall clearly note the project value, a comparison of budget versus actual costs incurred, project constraints, location, client names, and references. Proponents should provide the phone number and email address of any individual from each client who can provide details and feedback regarding the Services performed by the Proponent. The Township may contact these references.

Experience of Project Team

Proponents shall provide the Curriculum Vitae (CV) of the Project Manager; and list all other project team members that would be directly involved in the project, indicating relevant experience, qualifications, credentials, and notable achievements in each area of the Work. Proponents shall provide a project organization chart and a table clearly indicating the role and responsibility each team member will play, the anticipated hours of each, and the total role and project hours. The Consultants assigned to the project should remain in-place for the duration of the project, unless the written notification has been provided and approved by the Township's Project Manager. As a supplement, a schedule of rates for all key personnel, technical staff, and support personnel must be included. These rates will be used for any additional work that is authorized by the Township.

Approach and Methodology

Proponents are to communicate, in detail, their understanding of the scope of work and clearly define and describe how their proposed approach would meet those requirements, including the project constraints, risks, opportunities, sequence and timing of milestones, the respective expertise involved, and their time allocation for each.

Proponents should provide clear, well-defined plans for each project phase, broken down by tasks and deliverables and should indicate all services which are to be included, excluded, optional, or to be provided by others. These plans should include the scheduling of activities and resources necessary to meet the project objectives, including the provision of a quality assurance and control plan that ensures senior technical review of relevant project activities.

Schedule of Work

Proponents shall provide a work schedule and timeline which clearly identifies proposed start dates, progress meeting dates, milestones, other key events, and major project deliverables. The schedule shall identify the critical path, delineate what resources will be required, and when they will be required. The proposed timeline shall closely align with Section 8 Project Timeline.

Pricing

The submitted proposal should identify the 'Net Total Cost', plus applicable taxes, to provide the services as outlined in the Scope of Work. The Proposal must include a breakdown of the hourly charge out rates of key personnel and support staff (which must include labour and material costs, applicable taxes, expenses/disbursements, and any other charges). Direct project costs must be broken down by personnel and estimated hours per task. Disbursements shall include the costs of printing and reproducing, drawings, reports, travel, accommodation costs, out of pocket expenses, and all other expenses.

The Proposal may also provide separate pricing on additional features the Proponent feels would benefit the Township of Esquimalt in meeting its goals.

10. PROPOSAL EVALUATION

The Township, in its sole discretion, may disqualify any Proposal before its evaluation is fully completed if it contains false information, reveals a conflict of interest, or if the Proponent misrepresents any information provided within it. Proponents should include in their Proposals all relevant information that would allow the Township to accurately assess their organization regarding the evaluation criteria. The Township will make no assumptions on the behalf of the Proponent. The Township shall consider each Proposal and, after such consideration, shall have the right to require any or all of the respondents to attend a presentation to clarify their Proposal. The Township reserves the right to contact references provided by the Proponent, and to utilize information acquired from references as part of its overall evaluation.

The Township will evaluate each proposal submitted on the basis of how well the Proponents respond to the requirements of the RFP. Each submission will be assessed using a matrix scoring system based on the criteria below.

11. EVALUATION CRITERIA

This section details the evaluation process for selecting the best qualified Proponent. Proponents should ensure that they fully respond to all criteria in the order presented in their submission to receive full consideration during the evaluation process. The Township of Esquimalt recognizes that "best value" is the essential component of this project, and therefore the Township will carefully consider both

technical and cost factors in its selection criteria. The following table identifies the key criteria that the Township has deemed relevant, and the point assignment of each.

	Description	Weight
1	Qualifications & Experience – Company experience, personnel qualifications, similar projects, references, etc.	30%
2	Methodology – Response to RFP project requirements, approach, demonstrated understanding of project requirements, work plan, etc.	30%
3	Proposal – Completeness, overall quality and level of details submitted, value added services, etc.	10%
4	Proposed Fees – Pricing structure, fees, costs, hourly rates, etc.	30%

12. AWARD

It is not the intent of the Township to award this project to any Proponent that does not furnish satisfactory evidence of possessing the experience and ability required, and sufficient resources to ensure acceptable performance and completion of the Work. The Township reserves the right to reject any submitted proposal from any Proponent who, in the Township's reasonable opinion, is deemed incapable of providing all necessary resources to perform the Work in a satisfactory manner.

This RFP is not a tender and does not commit the Township in any way to select a Consultant. This RFP and a Proposal received by the Township in response to it shall not give rise to any contract, including the contract known in the law of tendering as "Contract A", between the Township and the Proponent who submitted the Proposal. No contract of any nature shall arise between the Township and a Proponent unless and until the Proponent and the Township execute and enter the Contract. The Township reserves the right, should it be deemed in the best interest of the Township to so do, to reject or retain for its consideration. Proposals which are non-conforming because they do not contain the content or form required by this RFP or for failure to comply with the process for submission set out in this RFP. In addition, the Township may elect to reject any or all Proposals for the following reasons:

- All Proposals received are outside the available budget for this project.
- The Township decides to cancel the project.

Right to Negotiate

After the contract has been awarded to the Consultant, the Township reserves the right to negotiate minor changes, amendments, or modifications to the Consultant's Proposal, without offering the other Proponents the opportunity to amend their Proposals.

Failure to Execute an Agreement

In addition to all other remedies, if a selected Proponent fails to execute the Contract within 30 calendar days of notice of project award, the Township may, in their sole and absolute discretion and without

incurring any liability, rescind the selection of the Proponent. Should the aforementioned occur, the Township further reserves the right to remove the Consultant from eligibility to submit future proposals for other projects thereafter.

Limitation of Liability

Each Proponent agrees not to bring any claim against the Township or any of the Township's employees, advisors and representatives for costs, expenses, losses or damages, loss of anticipated profits, or for any other matter whatsoever, for any matter in relation to or arising out of this RFP, including but not limited to:

- if the Township awards the Contract to a Proponent who submitted a Proposal that does not comply in a material or immaterial way with the requirements of this RFP or if the Township otherwise does not conduct itself in conformity with this RFP; or
- if the Township modifies, suspends or cancels this RFP for any reason (including modification of the scope of the Work) or the Township exercise any rights under this RFP.

Insurance Requirements

The successful Consultant agrees to implement and submit proof of insurance upon award of the Contract. The insurance must be maintained for the duration of the Contract at the Consultant's own cost and expense, in such amount, in such forms, and with insurers acceptable to the Township. No Contract will be awarded to any Consultant who cannot meet the insurance requirements.

Regulatory and Legislative Compliance

The successful Consultant shall ensure services and products provided in respect to the Work are in accordance with, and under the authorization of, all applicable authorities and municipal, provincial, and federal legislation and Acts. The Consultant will provide the Township with a copy of their current Certificate of Clearance from WorkSafeBC BC, prior to, or at the time of, signing the Contract.

The consultant must have the necessary qualifications for and be willing to accept the responsibilities as Prime Contractor for the Contract.

By submitting a Proposal, the Proponent represents that it has the legal capacity to enter a Contract and is in compliance with all federal, provincial, and municipal laws and regulations applicable.

Force Majeure

Neither party shall be responsible for any delay or failure to perform its obligations under this agreement by reason of force majeure. If either party is unable to perform any of its contractual obligations by reason of force majeure, including fire or other casualty, strike, order of a public authority, Act of God, or other cause beyond the reasonable control of such party, then such party shall be excused from such performance of the obligations for the duration of such cause. In the event such inability to perform shall continue longer than 30 days, either party may terminate this agreement without further liability by giving written notice to the other party