

Blueberry River Restoration Society

REQUEST FOR PROPOSAL (RFP)

Custom Salesforce CRM & Funding Allocation Platform One-Time Project

ISSUE DATE

September 2, 2025

CLOSING DATE AND TIME

Proposals must be received in electronic format by 4:00 pm MST on September 30, 2025.

*All inquiries regarding this RFP must be submitted via email to
ceo@brrsociety.org*

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1. Purpose

The Blueberry River Restoration Society (“the Society”) seeks proposals from qualified consultants to complete a customized Salesforce CRM and funding allocation platform. The Society requires a scalable solution that empowers the team to do their best work in managing applications, approved projects and funding, while managing a centralized interest holder database.

2. Organization Background

The Society was established as part of the Blueberry River First Nations Implementation Agreement following the 2021 BC Supreme Court decision on cumulative impacts. It represents a unique partnership between Blueberry River First Nations and the Province of British Columbia, focusing on restoring ecosystems and upholding Treaty 8 Rights. Cultural revitalization is central to the Society’s mission, recognizing the interconnectedness of ecological and cultural renewal.

3. Scope of Work

The scope of work includes the custom development and deployment of a full-cycle funding management solution, internal application review and approval management, external project application and tracking management, and centralized constituent management, all within the Salesforce ecosystem. The successful proponent will be responsible for delivering a scalable and efficient solution that meets the specific needs of the Blueberry River Restoration Society.

The successful proponent will deliver the following:

Full-Cycle Funding Management Solution:

- Comprehensive funding application, approvals, and distribution management.

Internal Application Review and Approval Management:

- Efficient and effective application review and approval process and tools that ensure project feasibility, alignment with funding priorities, and that interest holders are appropriately engaged.

External Project Application and Tracking Management:

- Intuitive, accessible application submission and reporting system for project proponents, centralizing all details, documentation and deliverables for proposals and funded projects.

Centralized Constituent Management:

- Single source of truth for all interest holder data.

4. RFP Process

- **Intent to Submit:** Proponents are encouraged to confirm their intention to submit a proposal by emailing ceo@brrsociety.org no later than **September 15, 2025** (template attached in Appendix A). This ensures they receive all responses to inquiries and any additional information distributed during the RFP process. Proponents who do not submit an intent to submit may still submit a proposal but risk missing critical updates.
- **Inquiries:** All inquiries related to this RFP must be submitted via email to ceo@brrsociety.org by **September 15, 2025**. Responses to inquiries will be shared with all potential proponents by **September 19, 2025**.
- **Proposal Submission:** Proposals must be submitted in PDF format to ceo@brrsociety.org by **4:00 pm MST on September 30, 2025**. Late submissions will not be considered.
- **Notification:** Proponents will be notified of the results no later than **October 31, 2025**.

5. Proposal Format and Content

Proposals should include the following:

1. **Cover Letter:**
 - Signed by an authorized representative, confirming an understanding of the RFP and commitment to the proposed engagement (template attached in Appendix B)
2. **Work Plan:**

- Outline the methodology, timeline, and key deliverable dates for completing the project, including staffing levels and anticipated effort.

3. Experience and Qualifications:

- Describe the firm's relevant experience, including three recent projects with similar scope. Highlight experience working with Indigenous-owned organizations.
- Provide résumés of key personnel involved.

4. Price Proposal:

- Provide a total fee for the project and a detailed cost breakdown by deliverable.

5. References:

- Include contact information for three references from similar projects.

6. Other Information:

- Highlight additional qualifications or unique approaches that add value to the project.

6. Additional Terms and Expectations

- **Proposal Validity:** Proposals must remain valid for 90 days from the closing date.
- **Confidentiality:** Information obtained during this RFP process is confidential and must not be disclosed without consent.
- **Ownership:** All deliverables produced under this contract will be owned by the Society.

7. Evaluation of Proposals

Proposals will be evaluated based on the following criteria:

- Understanding of the Scope of Work
- Experience with Similar Projects
- Key Personnel Qualifications

- Experience Working with Indigenous Organizations
- Proposed Budget
- Flexibility and Approach

8. Criteria for Assessment

Proposals must clearly demonstrate the ability to meet the project's objectives, adhere to the timeline, and align with the Society's mission. The evaluation process may include interviews or presentations with shortlisted proponents.

9. Appendices

Appendix A: Intent to Submit Letter

Appendix B: Response Covering Letter

For more information about the Society, please visit [the Society's website](#).

Appendix A: Intent to Submit Letter

[Proponent's Letterhead]

[Date]

Blueberry River Restoration Society
via email: ceo@brrsociety.org

Attention: Angela D'Amato van den Hout, CEO

Dear Angela,

We, the undersigned, declare that we intend to submit a proposal in response to the Request for Proposal for Custom Salesforce CRM and Funding Allocation Platform issued on September 2, 2025. We understand that:

- Any questions about the RFP must be submitted to ceo@brrsociety.org by **September 15, 2025**
- Answers to questions submitted will be provided by **September 19, 2025** to all proponents who have provided an Intent to Submit Letter.
- Closing date is **4pm MST on September 30, 2025** and late submissions will be not be accepted.

Sincerely,

[Authorized Signatory's Name]

[Title]

[Firm Name]

[Contact Information]

Appendix B: Response Cover Letter

[Proponent's Letterhead]

[Date]

Blueberry River Restoration Society
via email: ceo@brrsociety.org

Attention: Angela D'Amato van den Hout, CEO

Dear Angela,

We, the undersigned, hereby submit our proposal in response to the Request for Proposal for Custom Salesforce CRM and Funding Allocation Platform issued on September 2, 2025. We have read and agree to all instructions and provisions contained in the RFP. We confirm that the statements made in our proposal are true and accurate.

Sincerely,

[Authorized Signatory's Name]

[Title]

[Firm Name]

[Contact Information]