



Town of Creston

REQUEST FOR EXPRESSION OF INTEREST (“RFEOI”)

For

ENTERPRISE RESOURCE PLANNING (ERP) SOFTWARE SOLUTION

Expression of Interest submissions marked “ENTERPRISE RESOURCE PLANNING (ERP) SOFTWARE SOLUTION” will be received at the Town of Creston

| | |
|---|--|
| Issue Date: | April 8, 2026 |
| Closing Date and Time: | Expressions of Interest must be received by e-mail to Kirsten Dunbar at kirsten.dunbar@creston.ca by the closing time of 3:00 pm (15:00 hrs.) Pacific Time, April 29, 2026. |
| Questions and Inquiries to be sent to: | Kirsten Dunbar at kirsten.dunbar@creston.ca before the close of the business day April 22, 2026. |

All RFEOI documents may be obtained from the Town’s website or BC Bid. It is the sole responsibility of proponents to check the Town’s website and/or BC Bid for any updated information and addenda before the Closing Date and Time.

The Town reserves the right to accept or reject any or all Expressions of Interest and will not be responsible for any costs incurred by the proponents in preparing an Expression of Interest.

There will be no public opening of submissions.

Kirsten Dunbar
Director of Corporate Services
Town of Creston

Table of Contents

| | | |
|------|--|----|
| 1.0 | GENERAL INFORMATION | 4 |
| 1.1 | Purpose of the Request | 4 |
| 1.2 | About the Town of Creston | 4 |
| 1.3 | Scope of ERP Needs | 4 |
| 1.4 | Current System and Transaction Volumes | 6 |
| 1.5 | Terminology..... | 7 |
| 2.0 | INSTRUCTIONS TO PROPONENTS..... | 8 |
| 2.1 | Review and Interpretation of Expressions of Interest..... | 8 |
| 2.2 | Inquiries and Clarifications | 8 |
| 2.3 | Non-Solicitation | 8 |
| 2.4 | Addenda | 8 |
| 2.5 | Omissions or Discrepancies | 8 |
| 2.6 | Expression of Interest Requirements | 9 |
| 2.7 | Modification or Withdrawal of Expressions of Interest..... | 9 |
| 2.8 | Opening of Expressions of Interest..... | 9 |
| 2.9 | Insurance | 9 |
| 2.10 | Registration with WorkSafe BC | 9 |
| 3.0 | SUBMISSION REQUIREMENTS FOR EXPRESSIONS OF INTEREST..... | 10 |
| 3.1 | Mandatory Requirements | 10 |
| 3.2 | Content | 10 |
| 3.3 | Delivery..... | 10 |
| 3.4 | Prices | 10 |
| 4.0 | TERMS AND CONDITION OF RFEOI | 11 |
| 4.1 | Acknowledgment..... | 11 |
| 4.2 | Preparation of Expression of Interest..... | 11 |
| 4.3 | Conflict of Interest..... | 11 |
| 4.4 | Interpretation | 11 |
| 4.5 | No Claim | 11 |
| 4.6 | Not a Tender | 11 |
| 4.7 | No Obligation to Proceed | 11 |
| 4.8 | Town’s Reservations..... | 12 |
| 4.9 | Applicable Law | 12 |
| 4.10 | Freedom of Information and Protection of Privacy Act | 12 |
| | Schedule 1 EXPRESSION OF INTEREST SUBMISSION FORM..... | 13 |
| 1. | Vendor Profile..... | 14 |

| | | |
|----|---|----|
| 2. | Relevant Experience..... | 14 |
| 3. | Solution Overview..... | 14 |
| 4. | Technical Overview and Integration Capability | 16 |
| 5. | Cost Estimates..... | 16 |

1.0 GENERAL INFORMATION

1.1 Purpose of the Request

The purpose of this Request for Expressions of Interest (“RFEOI”) is to identify potential software vendors and solution approaches to support the Town of Creston’s future Enterprise Resource Planning (“ERP”) needs. The Town intends to use responses to better understand the market, assess the fit of commercially available solutions, identify likely implementation and support considerations, and inform its approach to a possible future procurement process.

Responses to this RFEOI will be considered non-binding. However, the Town may elect to use the information gathered to identify organizations invited to a future RFP process.

1.2 About the Town of Creston

The Town of Creston is a growing municipality of approximately 6,200 citizens located in southeastern British Columbia and serves as a service, employment, and community hub for the surrounding Creston Valley region. Incorporated in 1924, the Town is governed by an elected Council comprised of one Mayor and six Councilors, and delivers a broad range of municipal services through its Finance, Corporate Services, Infrastructure Services, and Community Services functions.

As the Town continues to grow, it must ensure that its administrative systems, service delivery approaches, and underlying business practices continue to evolve and mature in order to meet increasing service expectations, improve organizational efficiency, and support the effective delivery of services to residents, businesses, Council, and staff. The current annual budget includes \$18.1 million in operating budget and \$17.1 million in capital budget.

1.3 Scope of ERP Needs

The Town has identified a number of current-state challenges through a recent technology review. These include limited capabilities in current tools, reliance on manual work, challenges with system support, and a lack of integration that leads to fragmented data and extensive duplicative work. Overall, the key objectives of an ERP replacement include the following:

- Reduce manual processes and reliance on spreadsheets and workarounds
- Where possible, replace fragmented legacy systems with a unified, integrated platform
- Improve data integrity, consistency, and cross-department visibility
- Enable modern reporting, analytics, and decision-making capabilities
- Strengthen integration with core systems and future digital solutions
- Implement scalable, modern platform supporting growth and change

The current systems used by the Town are as follows:

| Application | Current use |
|-------------|--|
| Vadim | Finance system, including support for: <ul style="list-style-type: none">• General Ledger• Accounts Receivable• Accounts Payable• Cash Receipting• Bank Reconciliation |

Town of Creston
ENTERPRISE RESOURCE PLANNING (ERP) SOFTWARE SOLUTION

| | |
|-----------------------------|--|
| | <ul style="list-style-type: none"> • Tax Administration • Utilities Administration • Cemetery • Business Licenses • Payroll |
| HRIS MyWay | Staff time entry and some HR information |
| CIBC | Banking and credit card platform |
| New Pay / Option Pay | Point-of-sale solutions |
| ArcGIS | GIS solution supporting planning |
| QGIS | GIS solution supporting public works |
| Unity Asset Manager | Work order management and some asset management |
| City Reporter | Permits and Inspections |
| eScribe | Council meeting management |
| Envisio | Public data sharing and reporting |
| Laserfiche | Records management |
| FirePro | Fire department and bylaw management support, including: <ul style="list-style-type: none"> • Hourly time tracking by incident for fire staff • Complaints and bylaw enforcement management • Ticketing |

Additionally, the Town uses excel documents to support various processes across the organization.

The Town’s core requirement is for modern finance functionality to replace Vadim. At minimum, the Town requires a solution that will provide strong support for:

- General ledger
- Accounts payable
- Accounts receivable
- Property tax administration
- Utilities administration
- Cash management
- Bank reconciliation
- Financial reporting
- Budgeting
- Project costing
- Grant management

These areas are central to the Town’s operations and would be expected to form the foundation of any future ERP solution that replaces Vadim.

Additionally, the Town is interested in understanding which broader municipal functions could be effectively supported by the ERP platform itself, to replace other current systems or excel tools currently used. For example, incorporating some of the following functions into a single platform could provide some benefits to staff and service delivery:

- HR & payroll
- Work orders and asset management
- Inventory management
- Procurement

- Planning and permitting
- Licensing, inspections and compliance
- Bylaw and enforcement
- Cemetery management
- Customer service request management
- Online citizen services
- Council meeting support
- Public reporting

Through the vendor input gathered by this RFEOI, the Town will further assess which of these functions could be replaced by an ERP platform, which could best leverage separate integrated solutions, and what overall solution architecture would best fit a small but growing municipality.

Please note that the Town is not currently interested in reviewing best-of-breed solutions for these specific non-financial areas. The Town’s initial focus is on ERP solutions and the extent of functionality they can be provided by ERP solutions.

Additionally, the Town has a preference for considering cloud-based solutions.

1.4 Current System and Transaction Volumes

Statistics and figure have been provided below to assist in proponents’ understanding of the Town’s current operating context.

| Organization Overview | |
|---|-------------------------------|
| Number of residents | 6,184 (2024 estimate) |
| Number of properties (different Roll #'s) | 3,250 |
| Annual Budget - Operating | \$18.1M |
| Annual Budget - Capital | \$17.1M |
| Number of permanent staff | 55 (plus 7 Elected Officials) |
| Number of annual casual / seasonal staff | 10 |

| Current ERP User Base | |
|---|----|
| Number of Finance users | 3 |
| Number of HR users | 2 |
| Number of limited users (e.g. reporting, approvals) | 6 |
| Number of staff time entry and self-service users | 55 |

| General Ledger Overview | |
|--------------------------------|-------|
| Number of active GL accounts | 2,664 |
| Number of funds | 15 |
| Number of banks accounts | 4 |
| Number of departments | 380 |

| | |
|----------------------------------|-----------|
| Number of projects annually | ~80 - 100 |
| Number of capital assets tracked | 7,000 |

| Transaction Volumes Overview | |
|--|----------|
| Number of active vendors | 4,991 |
| Number of vendor invoices processed annually | 5,408 |
| Number of accounts receivable customers | 1,078 |
| Number of tax accounts | 2,870 |
| Number of utilities accounts | 2,517 |
| Number of customer payment receipts annually | 11,620 |
| Number of licenses issued (business, animal) | ~ 12,000 |
| Number of building permits issued annually | ~ 60 |

1.5 Terminology

The following terms will apply to this RFEOI:

“Town” means the Corporation of the Town of Creston;

“Closing Date and Time” means the date and time provided on the cover page of this RFEOI;

“Contract” means the written agreement resulting from this any RFP subsequent to this RFEOI;

“Proponent” means an individual, Supplier or company that submits or intends to submit, an Expression of Interest inresponse to this RFEOI;

“Expression of Interest” means a submission by a Proponent in response to this RFEOI;

“RFEOI” means this Request for Expressions of Interest;

“RFP” means any Request for Proposals subsequent to this RFEOI;

“Submission Location” means the address provided on the cover page of this RFEOI and;

“Successful Proponents” means the Proponents selected by the Town to proceed to any subsequent RFP process.

2.0 INSTRUCTIONS TO PROPONENTS

2.1 Review and Interpretation of Expressions of Interest

Every Proponent bears exclusive responsibility to thoroughly review all RFEOI materials, including any supplementary documents issued throughout duration of the RFEOI. It is their obligation to understand all of the information and any terms that could impact the Expression of Interest in any manner prior to its submission.

2.2 Inquiries and Clarifications

Any questions and requests for clarification relating to the RFEOI may only be directed to the contacts identified on the cover page of the RFEOI.

2.3 Non-Solicitation

Proponents and their agents may only contact the Town representatives listed in this RFEOI and will not contact any other staff members or members of the Town Council with respect to this RFEOI at any time prior to the award of a Contract or the termination of the RFEOI. The Town at its sole discretion may reject the Proposal of any Proponent that makes any such contact.

2.4 Addenda

The Town reserves the right to modify the terms of the RFEOI at any time at its sole discretion up to the Closing Date and Time. Written addenda are the only means of varying, clarifying or otherwise changing any of the information contained in this RFEOI. It is the sole responsibility of the Proponent to thoroughly examine these documents and satisfy itself as to the full requirements of this RFEOI. If required, an addendum will be published on the following websites:

- a) BC Bid: www.bcbid.gov.bc.ca
- b) Town's website: www.creston.ca

Upon submitting an Expression of Interest, Proponents will be deemed to have received notice of all addenda that are posted on the Town's website and BC Bid and deemed to have considered the information inclusion in the Expression of Interest submitted. Information given by way of oral or verbal communication shall in no way be binding upon The Town for the purpose of this RFEOI.

2.5 Omissions or Discrepancies

Should a Proponent find discrepancies in, or omissions from the RFEOI, or should they be in doubt as to their meaning, they should at once notify the Town in writing who may send a written directive to all Proponents. No oral interpretations will be given by the Town to any Proponent as to the meaning of any part of the RFEOI Documents.

2.6 Expression of Interest Requirements

For an Expression of Interest to be considered, it must meet all requirements described in Section 3.0.

2.7 Modification or Withdrawal of Expressions of Interest

Modification to Expressions of Interest already submitted will only be allowed if submitted in writing prior to the Closing Date and Time. The Town reserves the right to request and receive modifications after the Closing Date and Time for purposes of clarification.

Submitted Expressions of Interest may be withdrawn by written notice provided such notice of withdrawal is received prior to the Closing Date and Time.

2.8 Opening of Expressions of Interest

Expressions of Interest will not be opened in public. Expressions of Interest may be opened by the Town at any time after the Closing Date and Time.

2.9 Insurance

Insurance requirements will be defined in any subsequent RFP and associated contract.

2.10 Registration with WorkSafe BC

WorkSafe BC registration requirements will be defined in any subsequent RFP and associated contract.

3.0 SUBMISSION REQUIREMENTS FOR EXPRESSIONS OF INTEREST

3.1 Mandatory Requirements

The Town will only consider responses that meet the following criteria:

- 1) Must be submitted by the Closing Date and Time identified on this RFEOI.
- 2) The solution proposed must be an ERP solution.

3.2 Content

Each submission should contain:

- 1) A PDF document containing the Expression of Interest Submission Form and responses to the questions posed in Schedule 1.
- 2) Optionally, a single additional PDF document with additional product information the proponent wishes to share with the Town as additional complementary information to what is shared in the main response.

3.3 Delivery

Expressions of Interest submissions must be received by the Town before the Closing Date and Time, and using the methods identified on the cover page of the RFEOI.

Expressions of Interest submitted via email must not exceed 25MB in total file size.

3.4 Prices

Directional pricing information is requested as part of Schedule 2 for information only and are non-binding. The Town recognizes that vendors may only be able to produce a price range for this purpose. Pricing is not evaluated as part of this process.

4.0 TERMS AND CONDITION OF RFEOI

4.1 Acknowledgment

By submitting an Expression of Interest, each Proponent acknowledges that it has read, understood, and agrees to be bound by all terms and conditions contained in this Section 4.0.

4.2 Preparation of Expression of Interest

All Proponents will be solely liable for all costs incurred in the preparation of Expressions of Interest in response to this RFEOI. This RFEOI does not commit the Town to award a contract, to pay costs incurred in the preparation of an Expression of Interest, or to contract for the goods and/or services offered.

4.3 Conflict of Interest

By submitting an Expression of Interest, 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 Town or their immediate families which might in any way be seen by the Town to create a conflict.

4.4 Interpretation

In the case of any inconsistency or conflict between the provisions of the RFEOI, the provisions of such documents and addenda thereto will take precedence in governing in the following order: 1) Addenda, 2) RFEOI, 3) all other documents referenced in RFEOI.

4.5 No Claim

Except as expressly and specifically permitted in this Request for Expressions of Interest (RFEOI) no Proponent will have any claim for any compensation of any kind whatsoever relating to this RFEOI and by submitting an Expression of Interest each Proponent will be deemed to have agreed that it has no claim.

4.6 Not a Tender

This is a Request for Expressions of Interest and not a tender call or call for quotations. No contractual, tort or other legal obligations are created or imposed on the Town or any other individual, officer or employee of the Town by the Request for Expressions of Interest documentation or by submission or consideration of any Expression of Interest by the Town.

4.7 No Obligation to Proceed

Though the Town currently intends to fully proceed through the RFEOI, selecting a shortlist of vendors to proceed to an RFP process, the Town is under no obligation to proceed to the Contract, or any other stage. The receipt by the Town of any information (including submissions, ideas, plans, drawings, models, or other materials communicated or exhibited by any intended Proponent, or on its behalf) will not impose any obligations on the Town. There is no guarantee by the Town, its officers, employers, or managers that the process will be initiated by the issuance of this RFEOI will continue, or that this RFEOI process or any RFEOI process will result in a contract with the Town for the purchase of goods or services.

4.8 Town's Reservations

The Town reserves the right to:

- a) amend, cancel, delay, suspend, terminate, or withdraw this RFEOI at any time;
- b) re-advertise the RFEOI or to commence a new procurement process in any other form;
- c) to not evaluate any Expressions of Interest after the Closing Date and Time;
- d) waive any minor defect or irregularity in an Expression of Interest;
- e) after evaluation of Expressions of Interest has been performed, to not proceed to an RFP process; and
- f) amend or negotiate terms of the agreement, including contents of Schedule 1 with one or more Proponents.

4.9 Applicable Law

The law applicable to this RFEOI will be the law in effect in the Province of British Columbia. No action in respect to this RFEOI may be brought or maintained in any court other than in a court of competent jurisdiction of the Province of British Columbia.

4.10 Freedom of Information and Protection of Privacy Act

Information received by the Town will be held in confidence and will become the property of the Town. The Town is, however, bound by the provisions of the *Freedom of Information and Protection of Privacy Act*, and all parties are advised that submissions will be treated as public documents and their contents disclosed if required to do so, pursuant to the Act.



Schedule 1 EXPRESSION OF INTEREST SUBMISSION FORM

The following cover page should be filled out and submitted along with the RFEOI Response.

| | |
|---|--|
| RFEOI Title and Number | |
| Respondent Organization Name | |
| Primary Contact Name and Title | |
| Primary Contact Phone Number | |
| Primary Contact Email | |
| Name of ERP Product | |
| Date of Submission | |
| Identify any Partners Included as Part of the Submission | |

Please provide responses to the following requests and questions.

1. Vendor Profile

Provide information about your organization, including:

- Legal company name, year established, location of company offices
- Overall background on the ERP solution offered (e.g. number of years in the market, number of current implementations in Canada)
- Description of your approach to implementation and ongoing support (i.e. vendor-led or partner-led)

2. Relevant Experience

Identify your organization’s experience delivering ERP solutions to other small Canadian municipalities, and whether you have implemented your solution in British Columbia. If possible, please include one reference client.

Additionally, identify any experience your organization has with migrating clients from the Vadim ERP and HRIS MyWay solutions.

3. Solution Overview

Provide information on the ERP product you offer, identifying capabilities the solution offers in each of the areas identified in the table below.

In the case where your ERP solution does not provide capabilities for a specified area, please identify whether you have successfully integrated your solution with common best-of-breed products in that functional area and provide examples if possible.

Additionally, if there are other additional capability areas not listed you believe could be valuable to the Town of Creston, please share that information within this section.

| Function | Capability Areas |
|---|---|
| Core Finance | <ul style="list-style-type: none"> • General Ledger & Financial Reporting • Budgeting & Forecasting • Procurement, Purchasing, Accounts Payable (PO tracking) • Accounts Receivable • Cash Management & Bank Reconciliation • Project / Job Costing • Fixed Assets Financial Management • Grant Management • Property Tax Administration • Utilities Administration |
| Payroll | <ul style="list-style-type: none"> • Time & Attendance Tracking • Payroll Processing & Calculations • Employee Self-Service (including Sick/PTO Balances) • Close integration between Finance and Payroll |
| HR | <ul style="list-style-type: none"> • Employee & Position Master Data • Performance Management • Training |
| Work Orders & Asset Management | <ul style="list-style-type: none"> • Maintenance Management • Inventory • Asset Management • Integration to GIS |
| Planning, Permitting & Licensing | <ul style="list-style-type: none"> • Land Management • Permit Management • Licensing (Business and Pet) • Integration to GIS |
| Bylaw and Enforcement | <ul style="list-style-type: none"> • Complaints Management • Investigations and Inspections • Ticketing & Fines |
| Customer Engagement | <ul style="list-style-type: none"> • Service Request Management (311) • Council Meeting Management (agendas, minutes, and livestreaming capability) • Citizen Mass Notification • Online Service / Payment Portal • Live citizen-access data and reporting |
| Cemetery | <ul style="list-style-type: none"> • Interactive Mapping • Sales Management • Burial Records • Work Order Scheduling • Public Facing Search Tools |

4. Technical Overview and Integration Capability

Provide information on the product related to the following:

- The solution's deployment model (e.g. cloud/SaaS)
- The solution's technical architecture
- How data is stored and managed (in particular, information on data residency, ownership and security)
- The solution's overall integration capabilities, and any experience in integrating the solution with other solutions within the Creston technology environment such as New Pay, Option Pay, HRIS MyWay, QGIS, Unity Asset Manager, Laserfiche, and FirePro

5. Cost Estimates

Provide directional estimates or cost ranges for the Town based on your experience with similar municipalities. The Town is interested in:

- Typical one-time implementation cost
- Typical annual costs such as licensing, based on the size of the organization
- Typical support costs (e.g. post go-live hypercare and ongoing maintenance)

Identify any assumptions made in what is provided (e.g. the extent of scope). The Town acknowledges that any estimates provided are non-binding and simply provided to assist the Town's understanding of the budget that would be needed to consider the respondent's solution. Note that statistics have been provided in a previous section to support the respondent's estimation.