Request for Proposals & Partnerships

Prepared: April 30, 2025

Proposal Submission Deadline: June 6, 2025

Request for Proposals and Partnerships: CRM

Purpose

Scouts Canada is inviting proposals for a modern, scalable CRM solution that will play a key role in our digital transformation. We're looking for a unified system that enhances the experience for members and volunteers, reduces administrative burden, and improves operational efficiency—so our teams can focus more on delivering our mission: to develop well-rounded youth who are better prepared for success in the world.

We welcome proposals from vendors and prospective partners that align with the objectives outlined in this RFP and share our vision for a long-term, strategic partnership.

About Scouts Canada

Scouts Canada is the country's leading co-ed youth organization, serving young people aged 5 to 26. Through outdoor adventures, community contributions, and skills-building experiences, we help youth grow into confident, capable leaders.

Each year, over 44,000 youth participate in our year-round programs across the country. An additional 5,000 youth attend summer camps, and 1,800 participate in introductory programs like *Learn to Camp*.

This work is powered by more than 17,000 dedicated volunteers, supported by 64,000 parents, guardians, and donors, and connected to a wider community of over 280,000 subscribers and followers across Canada. Together, we're helping build a better world through youth empowerment and community engagement.

Background

Scouts Canada currently operates on a legacy, custom-built system for registration and member management. While it has served us well in the past, it no longer meets the scale or complexity of our operations.

With more than 14,000 staff and volunteers using the system and approximately 46,000 youth registering during peak seasons, the platform is under increasing strain. It relies on a patchwork of disconnected applications with limited integration, leading to inefficiencies, manual workarounds, and a growing support burden on our teams.

This fragmented environment makes it difficult to deliver a seamless experience for members and volunteers and limits our ability to access timely insights and reporting.

Investing in a new CRM and registration system is a critical step in our digital transformation journey. We're seeking a modern, scalable solution that supports our operations, empowers our volunteers, and helps us deliver even greater impact in the communities we serve.

Project Vision and Objectives

Scouts Canada is seeking a modern, scalable CRM solution (or suite of tools) that will serve as a centralized platform for managing our relationships with key stakeholders. The system should support the following goals:

- Deepen engagement with members, donors, and volunteers through a unified experience
- Streamline administrative processes and reduce manual workload
- Strengthen data security and governance to meet compliance requirements
- Support integration with core business systems and future scalability
- Deliver actionable insights through flexible reporting and analytics

Partnership

We're looking for more than just a product—we're seeking a strategic partner who shares our values of collaboration, flexibility, and long-term impact. The ideal partner is passionate about youth development and volunteer engagement and is excited to support a wide range of programs—from STEAM and environmental education to outdoor adventure and community service.

To support this vision, vendors are welcome to propose partnership opportunities that bring mutual benefit. These could include co-branded campaigns, logo placement, in-kind contributions, or other creative ideas that align with Scouts Canada's mission and reach.

Please use **Appendix B** to outline any partnership offerings or requirements you'd like to include in your proposal.

CRM Requirements

We're looking for a tool -or a suite of integrated tools -that can deliver the features outlined in **Appendix C**. Below is a high-level overview of the main feature areas to guide your response. Please complete the matrix in Appendix C, indicating whether each feature is fully supported, requires customization, or is not available.

Our goal is to find a solution that meets our current needs, with the flexibility to grow and adapt with us over time.

- **Core CRM Capabilities**
  The CRM should give us a complete view of all our stakeholders, including detailed profiles, roles, history, notes, and interactions. It should support custom data collection, help prevent duplicate records, and offer strong administrative tools for managing users and workflows. We also need self-service options that allow parents / guardians to manage their own profiles and registrations, with support for mobile use, multiple languages, and accessibility compliance (e.g., WCAG) to ensure equity and usability for all.
- **Registration & Waitlists**
  The system must support high-volume seasonal registration and be scalable in a cloud-based environment. It should offer real-time availability tracking, dynamic capacity limits, and easy-to-use registration tools -including a searchable interface (e.g., by location). Automated waitlists, customizable approval workflows, notifications, and staggered enrollment are all key features to improving the registration experience.
- **Volunteer Registration & Management**
  Getting started as a volunteer should be simple and clear. The CRM should automate volunteer registration and account setup, offer step-by-step guidance, and send timely reminders (e.g., renewals or profile updates). It should also make it easy to search and manage volunteer records. Integration with background check services, relationship tracking, and eLearning platforms is essential to ensure a seamless and supportive experience for our volunteers.
- **Access, Security & Technical Capabilities**
  Given the CRM will handle sensitive information, it must include strong security and access controls. This means the system should support detailed, role-based permissions so that only authorized users can access specific data. Multi-factor authentication (MFA), single sign-on (SSO), and encryption of data both at rest and in transit are required.

We’re also looking for a system with strong integration capabilities -including modern, well-documented APIs and support for real-time, two-way data sharing. Preference will be given to solutions that offer RESTful APIs, webhooks, and compatibility with middleware platforms like Zapier, Mulesoft, or Azure Logic Apps. Finally, the CRM should include full audit logging and offer the flexibility to customize public-facing features, such as registration forms and portals.

- **Payment Processing & Subsidy**
  The CRM should include built-in tools to handle payments smoothly and securely. It needs to support things like group rates, gifting memberships, and applying discounts or subsidies to eligible members. To make financial processes more efficient, we’d also like to see automated refund options or customizable workflows for handling different transaction types.
- **Marketing, Communication & Engagement**
  Effective communication is a big part of what we do. The CRM should support outreach through email, SMS, and chat -with features like automated messages, behavior-based triggers, and engagement workflows to help keep our members and volunteers informed and involved.
  Tracking leads across multiple channels (like Facebook, Instagram, LinkedIn, and X/Twitter), collecting feedback through surveys, and analyzing engagement data will help us better tailor our outreach and understand what’s working.
- **Reporting & Analytics**
  We need strong reporting and analytics tools to support data-informed decision-making across the organization. The CRM should enable users to build and schedule custom reports, export data in various formats, and access role-based dashboards. Basic predictive analytics, such as for capacity planning, and support for real-time insights and trend analysis are important. In addition to basic reporting and dashboards within the CRM, the ability to deliver advanced analytics and cross-system reporting through external BI platforms like Microsoft Power BI or Tableau is required.
- **Financial & Fundraising**
  Fundraising and financial support are key to our mission. The CRM should make it easy to manage donations, sponsorships, and major gifts -including automatically generating tax receipts. It should also support recurring donations and make grant tracking more manageable. We’re looking for a solution that connects financial aid applications with reporting tools to simplify the process for both our team and our members, while also improving transparency.

In addition to the core CRM capabilities listed above, the solution must have the ability to deeply integrate with Scouts Canada's existing and future **Program Delivery** and **Training** tools. While these features are not required as part of the CRM's core functionality, vendors who offer capabilities that support training, program planning, meeting management, attendance tracking, achievement tracking, and honours and awards management—either as built-in features, add-on modules, or partner solutions—are invited to highlight these in their proposal.

RFP Proposal Submission Requirements

Thank you for your interest in partnering with Scouts Canada to support our mission through a modern CRM solution. Vendors are asked to submit their full response electronically, in PDF format, and keep submissions under 3,000 words if possible. Responses must be emailed to digitaltransformation@scouts.ca no later than June 6, 2025.

To ensure a thorough and consistent evaluation, please include the following information in your proposal:

1. **Company Overview**
    - Organization name, location, and primary contact
    - Brief background, including relevant expertise
2. **Relevant Experience**
    - Examples of similar CRM projects
    - Two client references, including contact information
3. **Project Team**
    - Key team members and their roles
    - Relevant qualifications and expertise
4. **Proposed Solution**
    - Overview of key features, system architecture, and security measures
5. **Project Delivery Approach**
   Please outline your implementation strategy, including:
    - High-level approach, phases, milestones, and timeline
    - Roles and responsibilities of project team members
    - Data migration plan, including how historical participant data will be handled and validated.
    - Post-implementation support, including service levels, response times, upgrade cycles, and product roadmap alignment
6. **Integration Capabilities**
   Please describe how your solution integrates with other systems, including:

- API types and capabilities (e.g., REST, GraphQL)
- Supported standards and protocols (e.g., OAuth, webhooks)
- Compatibility with middleware tools (e.g., Zapier, Mulesoft, Azure Logic Apps)
- Support for real-time and scheduled data sync
- Any known limitations (e.g., API rate limits, access restrictions)
- Access to technical documentation for Scouts Canada developers

7. **Pricing**

   Please provide a clear and transparent pricing model that includes:
   - Licensing costs
   - Implementation and support fees
   - Any optional services or add-ons

   Complete **Appendix A: Pricing Tables** as part of your submission.

8. **Partnership Opportunities**

   We value partnerships that align with our mission and values. Please share:
   - How your organization's approach complements Scouts Canada's commitment to positive youth development
   - Any experience working with similar organizations (e.g., non-profits, volunteer-led, or youth-serving)
   - Ideas for mutual value—such as co-branded campaigns, in-kind contributions, or other collaborative initiatives

   Please see Appendix B: Partnership Offerings/Requirements

9. **Additional Information**
   - Any assumptions, limitations, or value-added services you wish to note

10. **CRM Requirements Matrix**

    Complete the matrix in Appendix C, indicating for each feature whether it is:
    - Built-in
    - Add-on
    - Requires customization
    - Not available

Submission Instructions

Vendors are asked to submit their full response electronically in PDF format. Responses must be sent via email to digitaltransformation@scouts.ca no later than June 6, 2025.

Proposal Evaluation

Proposals will be evaluated based on the following weighted criteria:

Evaluation Criteria	Weight
Solution Fit and Functionality	30%
Technical Capabilities	15%
Vendor Experience, Implementation, and Support Approach	15%
Partnership Approach and Mission Alignment	15%
Cost and Overall Value	25%

Scouts Canada reserves the right to adjust these weightings or consider additional factors to align with organizational priorities and strategic direction.

Schedule

The following is the anticipated timeline for the RFP process. Scouts Canada may adjust these dates as required to ensure a fair and thorough evaluation.

Milestone	Date
RFP Issued	April 30, 2025
Deadline to Submit Questions	May 14, 2025
Responses to Vendor Questions Issued	May 21, 2025
Proposal Submission Deadline	June 6, 2025
Shortlisted Vendors Notified	June 18, 2025
Vendor Presentations / Demos	Week of June 23-27, 2025
Reference Checks Completed	Week of June 30, 2025
Final Evaluation and Selection	By July 21, 2025
Contract Negotiation and Award	By August 31, 2025
Project Kickoff	October 2025 (exact date to be confirmed)

RFP Contact

For all inquiries or correspondence related to this RFP, please contact:

Theresa Ennis (she/her)
Director, IT and Digital Transformation
Scouts Canada
theresa.ennis@scouts.ca

Thank you for your interest in partnering with Scouts Canada. We look forward to reviewing your proposal.

Appendix A: Pricing Tables

Implementation Costs

Cost Component	Description	Cost (CAD)
Project Discovery, Planning & Management		
System Configuration, Development & Testing		
User Training (Train-the-Trainer preferred; please add additional rows to break out other training options)		
Data Migration & Cut-over		
Post Go-live Support		
Infrastructure Deployment (if required)		
Additional implementation costs (add in rows as needed)		

Licensing Costs

Please complete the table below to summarize your proposed licensing model and estimated costs. A detailed cost breakdown outlining module pricing, optional features, third-party costs, and applicable discounts should also be attached.

We anticipate needing approximately **14,000 user accounts** to support staff and volunteers. In addition, members (parents, guardians, youth, and volunteers) will require self-service access to manage their profiles. Please indicate how your licensing model addresses both system and self-service users.

License Detail	Description	Cost	Currency
Model	(e.g. per user/month, flat fee, ...)		
Terms	(e.g. minimum 12-month upfront, multi-year discounts)		
Third-Party			
~Total Cost of Ownership – Year 1			
~Total Cost of Ownership – Year 2+			
Additional costs (add rows as needed)			

Product Roadmap and System Evolution:

Please share any available information on planned enhancements, upcoming features, and the long-term vision for their solution. In addition, please describe your approach to system maintenance, including how upgrades are typically delivered, the frequency of updates, the level of customer involvement required, and your commitment to maintaining compatibility over time. This information will assist Scouts Canada in evaluating the long-term sustainability of your platform.

Appendix B: Partnership Offerings/Requirements

Vendors are invited to propose partnership opportunities that offer added value to Scouts Canada and/or their own organization. These could include logo placement, collaborative campaigns, in-kind services, or other creative ideas that align with Scouts Canada's mission and public presence.

Please use the table below to outline any partnership offerings or requirements. If any pricing discounts or incentives are tied to a proposed partnership, be sure to clearly indicate them as part of your submission.

Offering/Requirement	**Details**
(Add rows as needed)	

Appendix C: CRM Requirements Matrix

Category	Feature	Built-In	Add-On	Customization Required	Not Supported
Core CRM Capabilities	Unified record of all stakeholder relationships, profile changes, role history, etc.	[ ]	[ ]	[ ]	[ ]
	Customizable fields and forms for data collection.	[ ]	[ ]	[ ]	[ ]
	Automated tools for detecting and merging duplicate records.	[ ]	[ ]	[ ]	[ ]
	Comprehensive administrative tools for managing user records, permissions, etc.	[ ]	[ ]	[ ]	[ ]
	Self-service features for updating profiles, managing registrations, etc. (parents/guardians)	[ ]	[ ]	[ ]	[ ]
	Multi-language support (English, French).	[ ]	[ ]	[ ]	[ ]
	Accessibility compliance (e.g., WCAG) to ensure equity across all users.	[ ]	[ ]	[ ]	[ ]
	Mobile-optimized interface.	[ ]	[ ]	[ ]	[ ]
	Offline data access and sync functionality.	[ ]	[ ]	[ ]	[ ]
	Support for hierarchical organization structures and relationships.	[ ]	[ ]	[ ]	[ ]
	Comprehensive automated workflow functionality for various CRM processes, including notifications, registration/member status, payment processing, transfers, and engagement.	[ ]	[ ]	[ ]	[ ]

Category	Feature	Built-In	Add-On	Customization Required	Not Supported
	Ability to store and attach individual documents (e.g., PRCs, training certifications) directly to individual profiles (volunteers, members, staff)	[ ]	[ ]	[ ]	[ ]
	Tools (e.g., AI, OCR, or other automated methods) to extract and populate relevant data from uploaded documents, minimizing manual data entry for high-volume submissions.	[ ]	[ ]	[ ]	[ ]
Registration & Waitlists	Scalable, cloud-based infrastructure for high-volume, seasonal registration.	[ ]	[ ]	[ ]	[ ]
	Capacity-based registration with real-time availability tracking.	[ ]	[ ]	[ ]	[ ]
	Self-service registration for parents/guardians with dynamic waitlist creation and visibility.	[ ]	[ ]	[ ]	[ ]
	Search for local program options via interactive map or filters.	[ ]	[ ]	[ ]	[ ]
	Automated placement based on eligibility rules.	[ ]	[ ]	[ ]	[ ]
	Configurable approval workflows for transfers or exceptions.	[ ]	[ ]	[ ]	[ ]
	Waitlist prioritization with manual override options.	[ ]	[ ]	[ ]	[ ]
	Automated notifications to registrants regarding status or changes.	[ ]	[ ]	[ ]	[ ]
	Staggered enrollment and pre-registration functionality.	[ ]	[ ]	[ ]	[ ]

Category	Feature	Built-In	Add-On	Customization Required	Not Supported
	Time zone handling consistency for registrants.	[ ]	[ ]	[ ]	[ ]
	Multi-child registration with easy add-to-cart functionality.	[ ]	[ ]	[ ]	[ ]
Volunteer Registration & Management	Automate registration/account creation for volunteers and staff.	[ ]	[ ]	[ ]	[ ]
	Automated notifications (e.g., renewal reminders, profile updates).	[ ]	[ ]	[ ]	[ ]
	Intuitive search with advanced filtering and multi-field queries.	[ ]	[ ]	[ ]	[ ]
	Digital recognition tools (e.g., achievements, years of service).	[ ]	[ ]	[ ]	[ ]
	Volunteer shift sign-up and availability tracking.	[ ]	[ ]	[ ]	[ ]
	Relationship tracking between youth members, parents, guardians, and volunteers.	[ ]	[ ]	[ ]	[ ]
	Categorization based on participation, attendance, and engagement.	[ ]	[ ]	[ ]	[ ]
Access, Security & Technical Capabilities	Granular role-based access controls for data and system functionality.	[ ]	[ ]	[ ]	[ ]
	Multi-factor authentication (MFA).	[ ]	[ ]	[ ]	[ ]
	Single Sign On (SSO) capabilities.	[ ]	[ ]	[ ]	[ ]
	Data encryption at rest and in transit.	[ ]	[ ]	[ ]	[ ]
	Audit logging and activity tracking for compliance.	[ ]	[ ]	[ ]	[ ]

Category	Feature	Built-In	Add-On	Customization Required	Not Supported
	Ability to customize and brand public-facing interfaces.	[ ]	[ ]	[ ]	[ ]
	Ability for support roles to masquerade as registrant/ user.	[ ]	[ ]	[ ]	[ ]
	Scalability to support record volumes of 500,000, with flexibility to scale as data volume grows.	[ ]	[ ]	[ ]	[ ]
	Ability to archive or flag records for archival after a predefined period of inactivity, based on configurable rules related to engagement or activity history.	[ ]	[ ]	[ ]	[ ]
	Capable of delivering system response <2 seconds under load, 99.9% uptime.	[ ]	[ ]	[ ]	[ ]
Integration Capabilities	Modern, well-documented API available (e.g., REST, GraphQL)	[ ]	[ ]	[ ]	[ ]
	Support for webhooks or event-driven integrations	[ ]	[ ]	[ ]	[ ]
	Real-time data synchronization support	[ ]	[ ]	[ ]	[ ]
	Scheduled/batch data synchronization support	[ ]	[ ]	[ ]	[ ]
	Integration with Microsoft 365 (e.g., Teams, Outlook, Azure AD)	[ ]	[ ]	[ ]	[ ]
	Middleware compatibility (e.g., Zapier, Azure Logic Apps)	[ ]	[ ]	[ ]	[ ]
	Integration with authentication systems (e.g., SSO, OAuth, LDAP)	[ ]	[ ]	[ ]	[ ]
	Developer portal or access to technical documentation	[ ]	[ ]	[ ]	[ ]

Category	Feature	Built-In	Add-On	Customization Required	Not Supported
	Ability to create custom connectors or use integration templates	[ ]	[ ]	[ ]	[ ]
	Audit logging for integration activity	[ ]	[ ]	[ ]	[ ]
Payment Processing & Subsidy	Integrated payment processing.	[ ]	[ ]	[ ]	[ ]
	Manage group rates with promotion-style functionality.	[ ]	[ ]	[ ]	[ ]
	Ability to gift memberships.	[ ]	[ ]	[ ]	[ ]
	Ability to apply subsidies or discounts to eligible members.	[ ]	[ ]	[ ]	[ ]
	Automated refund processing or workflow management.	[ ]	[ ]	[ ]	[ ]
Marketing, Communication & Engagement	Integrated marketing tools for email, SMS, and chat.	[ ]	[ ]	[ ]	[ ]
	Targeted messaging based on role, location, or engagement.	[ ]	[ ]	[ ]	[ ]
	Automated notifications for renewals, tasks, and engagement opportunities.	[ ]	[ ]	[ ]	[ ]
	Lead and pipeline management for prospective members and volunteers.	[ ]	[ ]	[ ]	[ ]
	Behavior-based triggers for communication and engagement.	[ ]	[ ]	[ ]	[ ]
	Feedback and survey tools or integrations to gather member input.	[ ]	[ ]	[ ]	[ ]
	Engagement analytics to track performance.	[ ]	[ ]	[ ]	[ ]

Category	Feature	Built-In	Add-On	Customization Required	Not Supported
Reporting & Analytics	Custom report builder.	[ ]	[ ]	[ ]	[ ]
	Report Scheduler.	[ ]	[ ]	[ ]	[ ]
	Multi-format exports.	[ ]	[ ]	[ ]	[ ]
	Role-based data management.	[ ]	[ ]	[ ]	[ ]
	Predictive analytics (capacity planning, trend analysis).	[ ]	[ ]	[ ]	[ ]
	Customizable dashboards can include live-updating visualizations (e.g., charts, counters, KPIs).	[ ]	[ ]	[ ]	[ ]
	Role-based dashboards allowing users to see relevant tools, data, and tasks in one place.	[ ]	[ ]	[ ]	[ ]
	Dashboards with actionable insights such as links, reminders, or task lists tied to the data shown.	[ ]	[ ]	[ ]	[ ]
	External BI integration for advanced analytics and cross-system reporting (e.g., Microsoft Power BI, Tableau).	[ ]	[ ]	[ ]	[ ]
Financial & Fundraising	Manage donor contributions and major gifts with automated tax receipting.	[ ]	[ ]	[ ]	[ ]
	Automate recurring donations.	[ ]	[ ]	[ ]	[ ]
	Grant Management tracking.	[ ]	[ ]	[ ]	[ ]
	Link financial aid applications with reporting tools.	[ ]	[ ]	[ ]	[ ]

Category	Feature	Built-In	Add-On	Customization Required	Not Supported
Additional Features (Interest Only) Vendors are invited to describe capabilities related to:					
	Activity and Event Planning to schedule and manage events, including location selection, equipment tracking, and logistics.	[ ]	[ ]	[ ]	[ ]
	Meeting and Program Management to organize recurring meetings, including agenda creation, attendance tracking, and resource distribution.	[ ]	[ ]	[ ]	[ ]
	Progress and Achievement Tracking to track individual progress, achievements, and milestones	[ ]	[ ]	[ ]	[ ]
	Training / Learning Management	[ ]	[ ]	[ ]	[ ]

Key:

- **Built-In**: Feature that is natively supported by the solution.
- **Add-On**: Feature available as an external addition or module.
- **Customization Required**: Feature that requires development or customization to be implemented.
- **Not Supported**: Feature that is not supported by the solution.