

Request for Proposal

Introduction

Coastal Villages Regional Fund (CVRF) is requesting proposals for Enterprise Resource Planning (ERP) software systems to facilitate collection, validation, storage, and distribution of data and information across the organization and its subsidiaries. Detailed requirements are included in Scope of Work.

Submissions

RFP Coordinator:

Name	Hans Clark
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Phone	907-980-1272

RFP Schedule:

Questions due from vendors	9/25/2026
Proposals due	10/9/2026
Interviews/Demonstrations	Oct/Nov 2026
Announce successful vendor, publish Notice of Selection	12/16/2026
Execute contract	1/31/2026

Vendor Responsibilities:

Solicitation Documents:

To download a copy of this document and the Requirements Matrix, see:

<https://coastalvillages.org/erp-rfp>

Each firm is responsible to fully read and understand all provisions of this RFP. If your firm has questions, contact the RFP Coordinator (listed under “Submissions” above). Each firm is responsible to follow all the instructions contained in this RFP and all published amendments.

The Proposer acknowledges and agrees that it has read this RFP and agrees to be bound by its terms and conditions.

The contents of the Proposal, specifically including those parts that deal with requirements, purchase cost, and official published specifications will become contractual obligations, and will be made part of the final Agreement.

Caveats

CVRF may reject any and all proposals. CVRF may cancel this procurement action at any time, even after the issuance of a Notice of Selection.

All costs incurred in the preparation of a proposal and participation in this RFP and negotiation process shall be borne by the proposing firms.

Proposal Requirements

Proposals shall be submitted to the RFP Coordinator (listed under “Submissions” above) by the date and time identified in “RFP Schedule” above.

Submit all inquiries in writing by email to the RFP Coordinator. Answers and clarifications will be in the form of an Addendum posted to [ERP RFP – Coastal Villages Region Fund](#).

Any changes to the RFP will be in the form of an Amendment posted to the same webpage.

Any changes by a proposer to a Proposal must notify the RFP Coordinator by email with the revised proposal attached.

During the procurement process, commencing with the issuance of the RFP and continuing until the award of a Contract for the project (or cancellation of the procurement) no employee, member, agent, vendor, advisor or consultant of any Proposer shall have one-on-one communications, directly or indirectly, regarding this procurement with any representative of CVRF involved in this procurement, except for communications permitted by this RFP. Any verified allegation that a Proposer has engaged in such prohibited communications may cause CVRF to disqualify a Proposer or a member of a Proposer’s team from participating in this process, all at the sole discretion of CVRF.

Selection Process and Criteria

CVRF will evaluate Proposals through an Evaluation Panel, including analyzing responses, ranking the ability to fulfill requirements in the Requirements Matrix, and potentially contacting references.

At CVRF’s discretion, vendors may be contacted to demonstrate functionality, answer questions, and address issues in interviews.

If interviews are conducted, CVRF may use combined evaluation of the Proposal and interview/demonstration to determine final ranking. **If a Proposer does not participate in a scheduled interview, CVRF may disqualify the Proposer.**

Proposers may request a debrief from the RFP Coordinator no later than 14 days after CVRF issues a Notice of Selection.

Evaluation Criteria

CVRF will use the following evaluation criteria and weighting.

Artifact	Used For Scoring
Requirements Matrix	Functional Fit (35%)
Vendor Qualifications Page	Experience Score (10%)
Implementation Page	Implementation Score (15%)
Data Migration Page	Data Migration Score (15%)
Pricing Page	Cost Score (15%)
Support	Support Score (10%)

Negotiation Process

After the Notice of Selection, CVRF will negotiate with the selected firm to finalize Scope of Work, project schedule, and total price. If negotiations are unsuccessful, CVRF reserves the right to select a different firm and will issue a Notice of Selection.

Current Operations

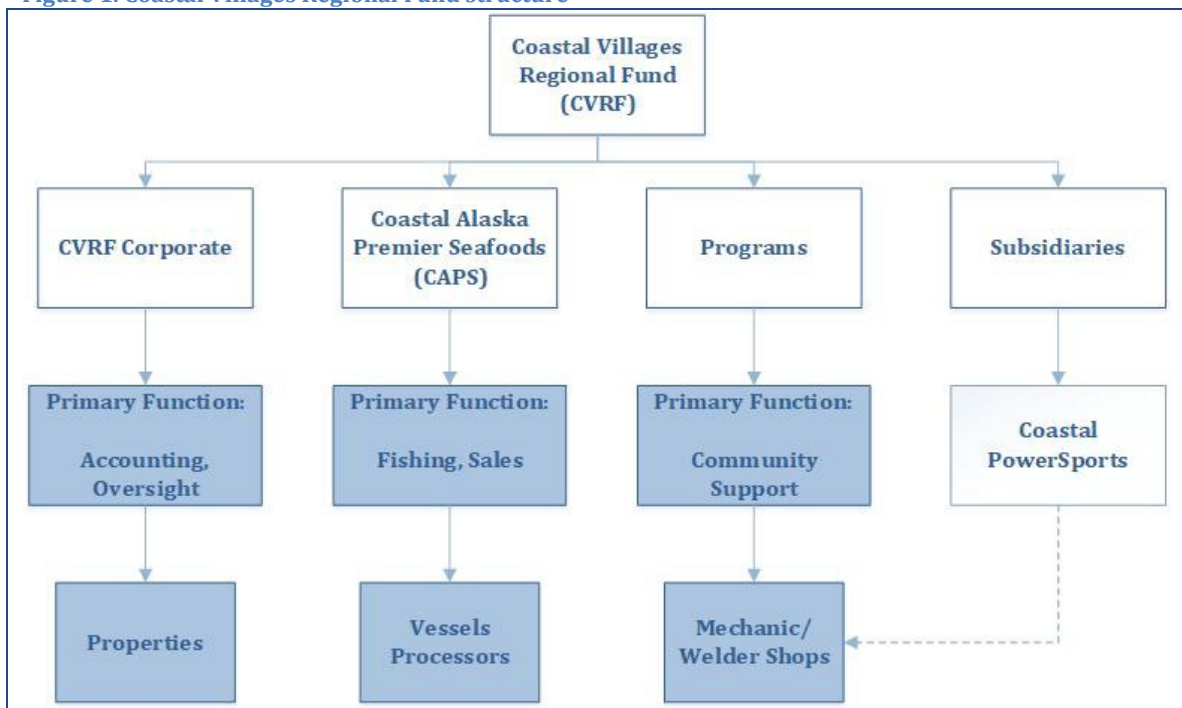
Coastal Villages Regional Fund is a non-profit organization that operates Alaska-village development programs and a four-vessel crab, pollock, and cod harvesting and processing fleet that fulfils Community Development Quotas and Individual Fishing Quotas in the Bering Sea in Alaska. CVRF uses revenue from Coastal Alaska Premier Seafood (CAPS) to fund village development and support programs. It owns subsidiaries, including Coastal PowerSports and Excellence Seafoods.

CVRF currently uses Dynamics GP and a variety of third-party add-ons to complete end-to-end ERP functions, including Accounting and Finance, Sales, Procurement, Inventory management and logistics, HR and payroll. Reporting is primarily handled by PowerBI. Other tracking and management is performed using Excel workbooks in every area of ERP activities.

In an effort to support ongoing operations and non-profit activities, CVRF requires improved visibility into data, including capital expenditures, operational expenses, non-profit outlays, harvesting and processing quota allocations, project management, and subsidiaries.

Company Overview

Figure 1. Coastal Villages Regional Fund structure



CVRF comprises:

- **Coastal Alaska Premier Seafood (CAPS)**

CAPS operates a commercial fishing fleet of fully owned, partially owned, and leased vessels to harvest crab and to harvest and process pollock and cod on behalf of 20 CVRF communities. The Alaska Department of Fish & Game (ADF&G) determines a total allowable catch by species and season. The National Marine Fisheries Service (NMFS) and National Oceanic and Atmospheric Administration (NOAA) Fisheries uses the total allowable catch and allocates Community Development Quotas (CDQs) seasonally and by species, which guarantees CVRF a set weight of harvest. CVRF also owns Individual Fishing Quotas (IFQs), which are also allocated by NMFS seasonally and by species.

Fishing for CDQs and IFQs is subject to detailed Federal regulations, covering harvesting, processing, and harvesting/processing. Reporting is required to both Sea State, Inc. (federal observers who report on catch, bycatch, etc.) and eLandings (ADF&G reporting of harvest quantities).

CVRF leases quota from other organizations and leases some of its own excess quota to other fishing operations. CVRF both pays and receives royalties from these leases. CAPS closely tracks harvesting and processing throughout each season as well as tracking royalty obligations; CAPS Quota Managers and Corporate AR Accountants maintain Excel Workbooks of the same quota and royalty data. Managing quotas is an intensive, specialized position; the Excel Workbooks are data-heavy.

CAPS maintains its fishing fleet, which involves managing projects, capital purchases, and major repairs and maintenance. Inventory is tracked for vessels that process the fishing catch. Project management primarily involves tracking major repairs and maintenance, which are performed by vendors. CAPS does not fully manage the projects; vendors themselves perform the scheduling, although CAPS does manage sequencing of activities.

CAPS negotiates sales contracts with about 30 clients for seafood and seafood products in the US, Asia, and Europe. There are also spot auctions for roe when it is available. Customer relationships are maintained by personal relationships. Negotiated quantities, pricing, delivery, and terms are maintained in Excel Workbooks. Network folders store emails and other documents to maintain an audit trail.

Production inventory data is collected by Innova equipment on board harvesting/processing vessels. The cost of goods sold (COGS) is calculated based on inventory unit to track projected revenue as inventory is produced.

As inventory is brought to port, CAPS manages deliveries, shipping, and invoicing. As with all perishable goods, rapid fulfillment of orders is normal operations. (That is, the product is shipped as soon as the vessel comes to port. Some inventory is stored for future sales.)

Payroll for CAPS is based on at-sea and in-port time. At-sea payroll is determined by crew share contracts and is paid at the end of a fishing trip; in-port payroll is hourly and is paid twice a month. Crew shares are contractual and are maintained in an Excel

Workbook; the gross pay per crew member is determined by the value of harvest per trip. Crew bonuses are also available per trip on vessels that both harvest and process fish. There are some technical issues with using electronic timekeeping on board some vessels; therefore, some timekeeping is currently done with paper timecards.

CAPS manages purchased inventory associated with on-board fish processing, vessel operations, etc. (e.g., packaging material). This is managed and tracked as different inventory than the fish that is for sale.

Communication, including transmitting daily production reports, with at-sea vessels is done with Starlink.

CAPS uses TeroMarine to manage procurement and vendor management, operating inventory, and preventive maintenance of vessels.

- **CVRF Corporate**

CVRF Corporate manages Accounting and Finance, Accounts Payable, Accounts Receivable, Payroll, and HR for CAPS, Corporate, and Programs.

CVRF Corporate performs oversight and policy enforcement to comply with Generally Accepted Accounting Principles (GAAP).

CVRF Corporate manages reporting and coordination with CAPS, Programs, and subsidiaries.

CVRF also handles management of two properties: an office building in downtown Anchorage, Alaska and a docking facility and office on Lake Union in Seattle, Washington. CVRF generates some revenue from rental income and moorage fees associated with these two properties. CVRF also manages all the expenses to manage, maintain, and operate the properties. Occasionally, CVRF generates revenue from tendering fees (that is, transporting fish from harvesting vessels to processing facilities so the harvesting vessels can remain on the fishing grounds).

Corporate uses Dynamics GP to manage all accounting functions, including AR, AP, production inventory, fixed assets, and financial record-keeping. SalesPad is an integrated third-party module that manages invoicing, Sales Orders, and customer master records. Corporate uses Paylocity to manage all HR and Payroll activities.

Corporate uses custom reporting (through PowerBI, Smartsheet, Spreadsheet Server) to generate reports, including CAPEX, operating expenses, sales revenue, etc., and Vena to manage project budgets and proposed major expenses.

- **Community Programs**

CVRF supports 20 remote, coastal Alaska communities with grants, training, youth employment, programs, senior support services, and Mechanic/Welder shops.

The Mechanic/Welder shops perform maintenance and repairs on equipment and vehicles in the 20 villages, which range in population from 70 to 1350. The

Mechanic/Welder shops operate independently from each other. Managing shop operations (work orders, equipment and parts purchases, shop inventory, invoicing, and taking payments) are primarily manual processes. There is no integration with the Corporate Accounting software; payments are reconciled by Corporate Accounting and some shop data is maintained in Excel Workbooks stored on shared network drives. Purchases are requested through email. Coastal PowerSports is the primary retailer that supports the Mechanic/Welder shops.

CVRF owns the **Community Service Centers (CSCs)** where the Mechanic/Welder shops are located. The CSCs have additional rooms for other community functions that support the villages, including access to the Internet via Starlink. CVRF Corporate is responsible for utilities, operations, staff, maintenance, upkeep, and improvements of the CSCs.

Internet connectivity for the communities is through Starlink.

Community programs include: a summer **Youth-To-Work program**, which ingests about 600 new summer employees into the payroll system through Paylocity; heating oil grants; senior support services; and yearly “gift certificates” to the Mechanic/Welder shop for shop labor activities.

Occasionally, the **People Propel®** grant and loan program subsidizes purchases of equipment, small vehicles, and outboard motors for subsistence harvest support. Coastal PowerSports is the primary retailer for the equipment, small vehicles, outboard motors, and vessel hulls for this program.

An electronic **Custom CRM (“Community Resource Management”)** system was developed to track membership, participation, and support services for each of the villages. It was customized from the Dynamics GP CRM module by an outside firm.

- **Subsidiaries**

- **Coastal PowerSports** is a wholly owned subsidiary that manages its finances in Lightspeed. It also uses Lightspeed to manage shop operations. Lightspeed is industry standard for Powersports dealerships and CVRF does NOT anticipate replacing it. It is the primary retailer who arranges logistics and shipping of equipment and parts for the Mechanic/Welder shops.
- **Excellence Seafoods** holds assets to support the CDQ requirements.
- Reporting for subsidiaries is included in yearly financial statements (Balance Sheet, P&L).
- Each month, subsidiaries export from **NetSuite** and Lightspeed and make a Journal Entry to “true up” accounting records.

Summary of Current Software Ecosystem

- Dynamics GP is used by CVRF Corporate to manage accounting functions.
- Paylocity is used by CVRF Corporate to manage HR and Payroll functions.

- TeroMarine is used by CAPS to manage vendors, requisitions, purchases, and vessel crews, as well as managing preventive maintenance and purchases for capital improvements to the vessels. TeroMarine has other capabilities that have not been implemented, though CVRF may implement them in the future.
- SalesPad is used by CAPS to manage customers, sales, inventory, and AR invoices.
- Innova is used by CAPS processing vessels to manage fish processing activities/inventory. Innova has other capabilities that have not been implemented, though CVRF may implement them in the future.
- PaperSave is used by CVRF Corporate to associate supporting documents with transactions in Dynamics GP as well as approval workflows.
- A Custom CRM ("Community Resource Management") built on the Dynamics365 (customer relations management) sales module is used by Programs to manage community participation in programs. It is maintained by a third party.
- PowerBI is used for reporting and dashboards.
- Excel and add-ons are used to manage data that is not currently manageable in Dynamics GP, TeroMarine, or Paylocity.
- SmartConnect
- Nolan Bank Reconciliation
- DocuSign
- Vena
- Spreadsheet Server
- Concur
- BluePay
- Paymode
- Microsoft 365 ecosystem (Outlook, Teams/SharePoint)
- eLandings
- Sea State, Inc.
- Netsuite
- Lightspeed
- Claude Co-Work
- 1099 Express
- Corpay
- Shared network drives

All three divisions extensively use Excel workbooks to manage projects, quota allocations, quota fulfillment, quota royalties, logistics, customer contracts, inventory allocation, CAPEX, crew shares (compensation for vessel crews), employee bonuses, payroll reports imported from Paylocity into Dynamics GP, budgets, projected revenue, community program work orders, and cost of goods sold (bill of materials). Multiple Excel add-ins used with these workbooks provide overlapping functionality and, in some cases, conflict with one another.

Challenges, Objectives, and Requirements

Key Challenges

- Heavy reliance on Excel Workbooks
- Low visibility into Capital Expenditures (CAPEX)
- Department level financial reporting
- Shortening/simplifying/automating equity role processes
- Excessive manual effort with bolt-on systems
- Specialized knowledge to manage quota data
- Personal relationships with customers
- Minimal automation in specialized sectors (perishable fish, fish products, and crab)
- Dynamics GP support is ending in 2029

Project Objectives

- Provide stable, extensible core ERP system that will support modules or functionality for specialized workflows, multiple locations (including at-sea vessels and remote Alaska villages using Starlink), and optional AI features
- Increase visibility into Capital Expenditures (CAPEX)
- Reduce manual tasks through automation
- Reduce “key-man risks” associated with specialized knowledge
- Reduce duplicated data
- Reduce reliance on Excel Workbooks
- Single source of truth for data currently managed in Excel Workbooks, TeroMarine, SalesPad, and Dynamics GP
- Some light-weight solutions that will integrate with the core Enterprise Resource Planning (ERP) system (for example, project management, Programs management, Mechanic/Welder shop operations)
- Economical solution that exposes the solution’s data layer to external analytics tools

Requirements

The Matrix of Requirements details CVRF’s requirements for this project. As described above (see “Current Operations”), there is a complex current landscape of operations, software, and manual processes.

The primary requirement is to replace the core ERP functions currently performed by Dynamics GP. While there is no requirement to replace TeroMarine, PaperSave, or Paylocity,

CVRF would like to see your offerings in these areas as well. CVRF reserves the option to continue with them and would like to see if your offering provides connectivity with them.

Must replace:

- Finance governance
- Accounts Payable
- Accounts Receivable
- Fixed Assets/Project Accounting
- Reconciliation
- Chart of Accounts
- Revenue and Expenses
- Reporting
- Salespad

Might replace:

- Inventory
- Project Management
- Preventive Maintenance
- Crew Maintenance
- Payroll
- Reporting

Demonstrated functionality should clearly identify which modules or applications are required. For example:

- Is support for attachments available without buying a separate module?
- Is there light-weight inventory tracking available without buying a separate module?
- Is the workflow engine a separate module?
- Is the Excel add-in a separate purchase?
- etc.

Vendor Instructions

Submission Instructions

Format

The proposal shall have one-inch margins, be no smaller than 10-pt font for readability, and have page numbers at the bottom of each page.

Page size, font size, margins, page numbers, etc.

Page limit (40?)

Number of diagrams (4?)

Proposal Contents and Order

The table below lists the required sections of the Proposal. Please use the filename and format listed.

Submit your Proposal as email attachments to the RFP Coordinator (listed under “Submissions” above).

If you have useful or explanatory diagrams, please include them as separate files.

Order	Item	Filename	Format
1	Proposal Transmittal Letter	<Company Name> ERP RFP 1 Letter	Word or PDF
2	Proposal Introduction	<Company Name> ERP RFP 2 Introduction	Word or PDF
3	Requirements Matrix	< Company Name> ERP RFP 3 Matrix	Excel
4	Vendor Qualifications	<Company Name> ERP RFP 4 Qualifications	Word or PDF
5	Implementation Approach	<Company Name> ERP RFP 5 Implementation	Word or PDF
6	Data Migration Approach	<Company Name> ERP RFP 6 Data Migration	Word or PDF
7	Pricing Sheet	<Company Name> ERP RFP 7 Pricing Sheet	Word or PDF
8	Confidentiality and Nondisclosure Agreement	<Company Name> ERP RFP 8 NDA	Word or PDF
9	Diagrams	<Company Name> ERP RFP 9 Diagram <1, 2, 3, etc.>	JPG or PDF

Proposal Transmittal Letter

Please provide a single page transmittal letter. Please include:

- Company name, mailing address, contact person, email address, and telephone number
- List of the files attached to the Proposal, including filenames, including any additional diagrams

Proposal Introduction

Please provide a single page describing your offering. Please include:

- Supported functional areas (e.g., AR, AP, Payroll, etc.)
- Overview of modules available
- Address whether your offering can meet all the requirements OR whether it provides connectivity to 3rd party applications that can meet those requirements¹
- Other relevant information about your offering or company that may be useful

Requirements Matrix

Filling Out the Requirements Workbook

- The tabs are organized by color to reflect functional areas of an ERP system. There are tabs that provide brief introductions to explain the current landscape. This is to provide context to better understand the requirements.
- Column B identifies CVRF's priority of the requirement. You cannot change the selection in this column.
- In column C, select:
 - **Core Functionality** if the feature is available without customization
 - **Configurable** if the feature is available (only) through configuration
 - **Custom** if the feature is available with customization or an additional module
 - **Not Available** if the feature is not available
- In column D, please provide any context. For example, list any additional modules that are required for full functionality; explain how the functionality can be alternatively achieved; whether your offering fully or partially meets the requirement, etc. **YOU DO NOT NEED TO FILL OUT COLUMN D FOR ALL ITEMS.**

¹ "The primary requirement is to replace the core ERP functions currently performed by Dynamics GP. While there is no requirement to replace TeroMarine, SalesPad, PaperSave, or Paylocity, CVRF would like to see your offerings in these areas as well. CVRF reserves the option to continue with them and would like to see if your offering provides connectivity with them."

- Do not change the formatting, add columns, remove lines, remove columns, or manipulate drop-downs or formulas. There are password-protected tabs to help us with evaluations.

Vendor Qualifications

Please provide a **one**-page description of your qualifications. Please include:

- Company overview
- ERP experience
- Industry expertise (rapid-fulfillment of perishable goods, fisheries, non-profit participation and programs engagement, etc.)
- References

Implementation Approach

Please provide a **one**-page description of your implementation approach. Please include:

- Methodology
- Timeline estimate
- Risk mitigation strategy
- Roles and responsibilities
- Staff resources (in-house or outsourced)
- Training and change management strategy or offerings

Data Migration Approach

Please provide a **one**-page description of your data migration approach and experience. Please include:

- Methodology or examples of past migrations
- Existing migration tools
- Examples of data volumes
- Cleansing expectations to be performed by CVRF
- Recommended sequencing of CVRF's data migration

Pricing

Please provide a **one**-page description of your pricing and contract breakdown. Please include:

- Licensing structure (site, per-user, etc.)
- Contract lengths and restrictions
- Current version offerings

- Á la carte pricing (per module, if available)
- Ongoing support and training pricing
- Pricing for implementation and configuration
- Pricing for data migration and cleanup support