

Request for Proposal (RFP): Finance Interface Software

CareerSource Citrus Levy Marion

Scope of Work

CareerSource Citrus Levy Marion (CSCLM), a 501(c)(3) not-for-profit organization, is seeking proposals from qualified vendors to provide a **finance interface software solution** that integrates seamlessly with **MIP Fund Accounting**. The desired solution should offer functionality similar to **Gazelle by NonProfit Technologies**, including but not limited to grant management, fundsource management by grant, purchase order creation, customer budget management, financial reporting, and real-time data synchronization. Gazelle is the current software being used by CSCLM.

The selected vendor will work closely with CSCLM's finance and IT teams to ensure a smooth implementation, data migration, and staff training. The solution must be scalable, secure, and user-friendly, with a strong emphasis on automation, transparency, and compliance with nonprofit financial standards.

It is our goal to have the new system implemented and staff training complete before December 30, 2025.

Overview

CSCLM is modernizing its financial systems to improve efficiency, accuracy, and reporting capabilities. We are looking for a cloud-based or hybrid finance interface platform that:

- Integrates directly with **MIP Fund Accounting**.
 - Supports **fund tracking**.
 - Provides **real-time financial dashboards and reporting**.
 - Offers **automated reconciliation and audit trails**.
 - Ensures **data security and compliance** with federal and state regulations.
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System Requirements

- Seamless integration with **MIP Fund Accounting** (API or direct sync).
- Cloud-based or hybrid deployment options.

- Role-based access control and user permissions.
 - Real-time financial reporting and dashboards.
 - Audit-ready transaction logs.
 - Secure data encryption and backup.
 - Mobile-friendly user interface.
 - ADA compliance and accessibility features.
 - User Acceptance Testing by CSCLM staff if modifications to an off-the-shelf product are proposed.
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Desired Functionalities

- Customizable financial reports and export options (Excel, PDF, CSV).
 - Workflow automation for approvals and notifications.
 - Budgeting and forecasting tools.
 - Multi-entity and fund tracking.
 - Document management and attachment support.
 - Training modules and user support documentation.
 - AI-powered insights or anomaly detection (preferred but not required).
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Selection Criteria

Proposals will be evaluated based on:

- Alignment with system requirements and desired functionalities.
- Demonstrated experience with MIP Fund Accounting integration.
- Cost-effectiveness and transparency of pricing.
- Implementation timeline and support structure.
- Innovation and added value beyond baseline requirements.

Shortlisted vendors may be invited to present a **live demonstration** of their solution, including a walkthrough of MIP integration and key features. See Attachment 1 for scoring details.

Proposal Requirements

Each proposal must include:

- A signed letter of intent from an authorized representative.

- A detailed description of the proposed solution and its architecture.
 - A breakdown of all costs, including:
 - Licensing and setup fees
 - Integration and customization costs
 - Training and onboarding
 - Ongoing support and maintenance
 - Implementation timeline with key milestones.
 - Terms for future upgrades and enhancements.
 - Overview of post-launch support and service level agreements (SLAs).
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Stevens Amendment

Services delivered by CareerSource Citrus Levy Marion are supported by the Employment and Training Administration of the U.S. Department of Labor as part of an award totaling \$6.9 million with no percentage financed from non-governmental sources. We are estimating costs for services requested in this RFP to be \$20,000 - \$25,000.00 (annually). However, we will review all proposals outside of this estimation if the services offered warrant a variance outside these estimated costs.

Proposal Submission and Timeline

- **RFP Release Date:** Monday, June 30, 2025
- **Proposal Due Date: Friday, July 25, 2025 at 4:00pm**
- **Review Period:** July 28 to August 1, 2025
- **Demonstrations:** August 4 through August 15, 2025
- **Executive Committee Selection:** August 27, 2025
- **Board Approval:** September 3, 2025

Respondents must submit their proposal in one (1) hardcopy and one (1) single electronic file in .PDF format by 4:00pm Eastern Standard Time on Friday, July 25, 2025 to: Dale French, Executive Vice President. Submissions should be marked "Finance Interface Proposal" for ease of identification. The primary point of contact for this request and all inquiries is:

Dale French
dfrench@careersourceclm.com
CareerSource Citrus Levy Marion
2703 NE 14th Street, Ocala, FL 34470
(352) 732-1700, Ext 2204 FAX (352) 873-7910

- CSCLM shall have the right to terminate this procurement if it fails to receive funding appropriate to continue operation. In such event, CSCLM shall give 30 days' advance notice of intent to do so, or, if funding is not established in time to allow such, a shorter period of notice is possible.
- Parties wishing to appeal or protest the provider selection and recommendations of the

Executive Committee should file a written protest within three business days of the committee's action. Such protest should include the basis of the protest and any other pertinent materials which the party wishes to have considered as justification for its protest.

- Letters of protest should be addressed to:

Carl Flanagan, Chairman
CareerSource Citrus Levy Marion
2703 NE 14th Street
Ocala, FL 34470

- Upon receipt of a protest, the Chairman will convene a meeting of the Executive Committee. All parties involved in the protest will be notified of the protest and the time and place of the hearing of the protest by the Executive Committee. Any affected party may present, in writing, a response to the protest for consideration by the Executive Committee.
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ATTACHMENT 1

CRITERIA	MAXIMUM POINTS
1. Proposed solution provides seamless integration with MIP.	10
2. Proposed solution allows user customization by role.	5
3. Proposed solution provides detailed and real-time reporting and data dashboards.	10
4. Proposed solution demonstrates acceptable levels of data security.	10
5. Proposed solution provides user-customizable reports by grant/fundsource.	10
6. Proposed solution provides access to budgeting and forecasting tools for grant management.	10
7. Demonstrated experience by the proposing entity with system implementation, data migration and user training.	10
8. Proposing entities ability to meet implementation timeline goals set forth in the RFP.	5
9. Proposed solution meets ADA compliance and accessibility standards.	5
10. Overall cost to proposed features and benefits. (If cost exceeds amounts listed in the RFP consider the features and benefits and if the additional cost supports the overall project scope)	25
TOTAL - MAXIMUM POINTS	100

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