Request for Information (RFI)

Finance Front-End User Interface for Integration with MIP Accounting Software

1. Introduction and Background

CareerSource Citrus Levy Marion (CSCLM) is a 501(c)(3) not-for-profit organization and one of nearly 600 business-led local workforce development boards across the United States. Our mission is to bring together citizens, employers, and education providers to design and implement programs that support high-quality education, training, and employment services tailored to meet regional workforce needs. In pursuit of increasing our operational efficiencies and data-driven decision-making, we are seeking information on a modern finance front-end user interface that integrates seamlessly with our existing MIP accounting software (MIP Fund Accounting). The interface is used by case management staff. We are currently using the Gazelle system by Community Brands as the front-line staff user interface. This system will sunset effective December 31, 2025. Establishment of a new system and integration with our current system needs to be completed before December 31, 2025.

2. Background on MIP Accounting Software

Our current accounting software is MIP Fund Accounting. The ideal solution should ensure that the financial interface not only integrates well with what is currently in place, but also enriches the user experience by leveraging the strengths of the MIP system while extending financial data visualization and interactivity. Vendors are encouraged to share relevant case studies or examples of similar integrations in their responses.

3. Objective

The aim of this RFI is to gather detailed information from potential vendors on how they might design and deliver a finance front-end user interface that:

- Enhances data visibility and usability and provides ease of access to front-line staff to issue purchase orders and create and manage customer budgets.
- Provides a robust, secure, and intuitive dashboard for financial information.
- Seamlessly communicates with our existing MIP accounting system.

This interface should empower our staff to access real-time (or near real-time) financial data, generate reports, and make informed decisions that support the mission of our organization.

4. Scope of Work and Functional Requirements

Vendors should address the following areas in their response and outline how their proposed solution meets these needs:

A. User Interface (UI) and User Experience (UX)

- **Design Excellence:** A modern, clear, and intuitive design consistent with current UI/UX best practices, ensuring that the interface is user-friendly across desktop, tablet, and mobile devices.
- **Accessibility:** Compliance with accessibility standards to ensure all users, regardless of ability, have a seamless experience.

B. Integration and Communication

- **Interoperability with MIP:** The solution must integrate smoothly with our existing MIP accounting software through reliable API endpoints or web services.
- **Data Synchronization:** Capabilities for real-time or near real-time data exchange to ensure up-to-date financial insights.

C. Data Visualization and Reporting

- **Dynamic Dashboards:** Customizable dashboards that provide both high-level financial overviews and granular insights.
- **Reporting Tools:** Ability to generate detailed financial reports with visual charts and graphs that can be tailored to different user needs.

D. Security and Compliance

- **Robust Security Protocols:** Implementation of secure authentication, role-based access control, data encryption (both in transit and at rest), and audit logging.
- **Regulatory Compliance:** Adherence to applicable financial data handling regulations and best practices.

E. Scalability and Customization

- **Flexible Architecture:** A solution that can accommodate future enhancements or additional modules as organizational needs evolve.
- **Customizable Features:** Options for stakeholders to tailor dashboard views and financial reporting to specific needs.
- **Customizable User Profiles:** Allows administrator users to add, edit, and delete customer profiles for each end user.

F. Performance and Reliability

- **Efficiency:** Optimized performance to ensure minimal loading times even when processing significant volumes of data.
- **Reliability:** High availability and resiliency in order to support continuous financial operations.

G. Data Migration

- **Existing Historical Data:** The replacement system will need to allow for full data migration of historical customer information from the Gazelle system.

5. Evaluation Criteria

Responses to this RFI will be evaluated based on overall thoroughness of information provided in response to the categories in section 4 as well as:

- **Understanding and Alignment:** How well the vendor understands our requirements and the specifics of integrating with MIP.
- **Technical Approach:** The feasibility and innovation behind the proposed solution.
- **Experience and Track Record:** Demonstrated expertise in financial user interfaces and managing integrations with accounting systems.
- **Security and Compliance:** Measures in place to protect sensitive financial data.
- **User Experience and Accessibility:** The design approach and commitment to providing an inclusive, high-performing user interface.
- **Implementation Timeline:** Preliminary estimates of clear milestones, and realistic delivery timelines.
- **Support and Maintenance:** Options for post-deployment support, training, and ongoing maintenance.

6. Submission Guidelines and Timeline

Please include the following in your response:

- **Company Overview:** A brief profile highlighting your relevant experience, expertise, and previous work in financial systems and integrations.
- **Technical Proposal:** Detailed descriptions of your proposed solution, including system architecture, system requirements, integration methods, hosting requirements, security measures, and user interface design.
- **Project Plan:** Estimated timelines, milestones, and a preliminary cost breakdown.
- **References and Case Studies:** Examples of similar projects completed recently, emphasizing financial system integrations.
- **Questions:** Any clarifications you require regarding this RFI; all questions will be consolidated and shared with all prospective respondents to ensure common understanding.

Submission Deadline: Friday, June 27, 2025 at 4:00pm

Submission Method: Please send your response electronically to Dale French at
dfrench@careersourceclm.com

Contact for Inquiries: Dale French, 352-732-1700 ext. 2204,
dfrench@careersourceclm.com

7. Additional Information and Next Steps

Following the evaluation of RFI responses, selected vendors may be invited to participate in further discussions or to submit detailed proposals with bids. CSCLM is committed to a transparent and collaborative process and appreciates your insights and innovations in response to this RFI.

8. Conclusion

CSCLM views the development/implementation of a robust finance front-end user interface as a strategic investment in time management and efficacy of our case management staff. Your participation in this RFI process is instrumental, and we look forward to engaging with vendors who can offer creative, secure, and scalable financial solutions tailored to our unique needs.