

Request for Proposal (RFP): Financial Assessment and Budget Workflow Development

Date Issued: 1/8/24

Proposal Deadline: 1/15/24

Overview

Oregon Human Development Corporation is seeking proposals from qualified consultants to lend a hand getting our annual budget uploaded to our accounting system. This project focuses on evaluating and enhancing our use of Abila MIP and Microix budget modules. A key outcome will be the development and implementation of sustainable budget products and workflows to ensure ongoing effectiveness after project completion.

Project Goals

The selected consultant will:

Evaluate how to effectively utilize Abila MIP and Microix budget modules.

Provide actionable recommendations for optimizing the use of these platforms to produce accurate, timely, and comprehensive program and field office budgets, including tracking local funding sources.

Develop and implement budget products and workflows that can be used independently by our team after the project concludes.

Identify and address any gaps or inefficiencies in the current budgeting processes.

Deliver training and resources to ensure long-term adoption of the improved workflows.

Scope of Work

The scope of work includes:

Assessment: Conduct a detailed review of current budgeting workflows and system configurations.

Analysis: Assess the integration between Abila MIP and Microix and their alignment with organizational needs.

Development: Create customized budget templates, reports, and workflows that meet the needs of program and field office budgets.

Implementation: Roll out the new workflows and provide hands-on guidance during the transition.

Training: Conduct training sessions and develop user manuals to ensure staff proficiency in utilizing the new tools and processes.

Final Report: Submit a comprehensive report detailing findings, implemented changes, and recommendations for future improvements.

Proposal Requirements

Proposals should include the following:

Introduction: Overview of your organization, relevant experience, and understanding of the project.

Methodology: Description of how you will conduct the assessment, develop products, and implement workflows.

Deliverables: Outline of expected deliverables, including templates, reports, and training materials.

Timeline: Proposed timeline for completing the project.

Budget: Detailed budget including fees and any associated costs.

References: Examples of similar projects and client references.

Evaluation Criteria

Proposals will be evaluated based on:

Expertise in Abila MIP and Microix systems.

Experience in developing and implementing sustainable budgeting tools and workflows.

Quality and feasibility of the proposed methodology.

Cost-effectiveness.

References and past performance.

Submission Instructions

Submit your proposal electronically to Victor.Acevedo@ohdc.org by 1/15/2025. Please include "Financial Assessment and Workflow Development RFP" in the subject line. For questions or clarifications, contact Victor Acevedo.

Timeline

RFP Issued: 1/8/2025

Proposal Submission Deadline: 1/15/2025

Consultant Selection: 1/20/25

Project Start Date: 1/30/2025

Completion Date: On or before 2/28/2025

Contact Information

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