# National Board of Public Health Examiners

**Request for Proposals**

**Credential Management System**

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# Purpose

The National Board of Public Health Examiners (NBPHE) is soliciting requests for proposals to implement an integrated credential management system (CMS) to support a new designation, the Disease Intervention Specialist (DIS) certification.

# About NBPHE

### History of the National Board of Public Health Examiners

The National Board of Public Health Examiners (NBPHE) was established as a non-profit organization whose mission is to credential the public health workforce. NBPHE is responsible for the development, maintenance, and administration of the Certified in Public Health (CPH) credential. The entrance point to the credential is the CPH examination, which is open to students and graduates from the Council on Education for Public Health (CEPH) accredited school and programs as well as public health professionals with sufficient work experience. The credential is evidence that candidates have demonstrated mastery of competencies relevant to contemporary public health. NBPHE's board is comprised of representatives from the Association of Prevention and Teaching Research (APTR), the Association of State and Territorial Health Officers (ASTHO), the National Association of City and County Health Officers (NACCHO), American Public Health Association (APHA), the Association of Schools and Programs of Public Health (ASPPH), Council on Education for Public Health (CEPH), Public Health Accreditation Board (PHAB) and individuals Certified in Public Health.

This CMS is not being implemented in support of the existing CPH credential, it is a new system to support a new credential the Disease Intervention Specialist, being developed by the ASPPH and NBPHE and funded by the Centers for Disease Control and Prevention.

### Relevant History and Background of the Disease Intervention Specialist Certification

The Centers for Disease Control and Prevention of the U.S. Department of Health and Human Services (HHS) has funded the development of a new certification for Disease Intervention Specialists as part of a Cooperative Agreement awarded to the Association of Schools and Programs of Public Health (ASPPH) and subaward to the National Board of Public Health Examiners (NBPHE). Through this funding, ASPPH and the NBPHE will develop a national DIS Certification to strengthen and unify the DIS workforce through skills and practice standards.

A DIS is primarily a non-licensed public health professional with applied expertise in preventing the spread of infectious disease at the community level. Disease Intervention Specialists (DIS) are vital members of the national public health workforce, reducing community spread of infectious diseases, including sexually transmitted infections (STIs), human immunodeficiency virus (HIV), COVID-19, viral hepatitis, tuberculosis, and more, through contact tracing, partner services, health education, and facilitating access to care.

# Project Description

The CMS will be the core platform for supporting management of DIS candidate engagement and credential tracking, data to effectively run and grow the program, promotional activity and market communication, and candidate community interaction.

The CMS requirements include customer relationship management (CRM), applicant intake and verification, certification management, and continuing education (CE) tracking and recertification. The system should also include the following capabilities and/or modules portal: reporting and analytics, volunteer module, study group message board, event registration, email marketing, and online courses. The CMS will integrate with our established partners for test administration and badging, working together in support of our team and our community.

NBPHE has a small but effective and collaborative team focused on successful implementation of the DIS credential as an important endeavor to support public health professionals and their support of public health.

Overall project goals:

- Prospect, certified professional, and partner management
- Customer account and identity management
- Customer journey and full lifecycle management
- E-mail marketing automation and ad-hoc communications
- Customer insights with detailed analytics
- Certified professional community support

We believe the development and support of DIS professionals to be a noble mission and are seeking a partner to join us on this mission, similarly, focused on serving these professionals with excellence and attentive support. We desire a system that is highly automated, reliable, intuitive, and secure. We desire a partner committed to a trusted relationship and who will act as a true extension of our team.

# RFP Approach and Specifications

We are seeking solutions, not just compliance with a feature list. The format of this RFP is intended to enable clarity around meeting essential requirements without being overly prescriptive or even exhaustive. To that end, we have included several open-ended sections and even in the sections where we have outlined requirements, we have also provided opportunity for narrative to portray how you can best meet our needs, stated or what you believe are unstated.

We are providing opportunity to address your questions, with time to use our answers to inform your response. We want to enable potential partners to give the accurate picture of your service and capabilities as well as cultural alignment, all in an effort to set up a success relationship that will benefit our mutual teams, our candidates, and ultimately the public.

The three top candidates will be invited to meet virtually with a committee to address questions, provide a chance to interact with each other's core team and hear a brief presentation. The selected vendor will be invited to contract for services using terms specified in the responses and subsequent negotiations.

## RFP and Implementation Timeline

| Activity | Due Date |
|---|---|
| RFP released | Monday, August 21, 2023 |
| **Notice of intent to bid & question submission deadline** | **Friday, September 1, 2023** |
| **RFP response due date** | **5pm EST, Friday, September 15, 2023** |
| Finalist notification | Friday, September 22, 2023 |
| Finalist presentations – virtual | week of October 9, 2023 |
| Vendor selection | Friday, October 20, 2023 |
| Contract execution | December, 2023 |
| Implementation kickoff | January, 2024 |
| Beta testing | Monday, April 1, 2024 |
| CMS go-live | Monday, July 1, 2024 |
| Exam delivery begins | Tuesday, April 1, 2025 |

We ask that bidders carefully consider the above timeline for managing response deadlines, building project timelines and to be ready for finalist presentations if selected.

## Key contact and question submission

All questions on RFP content must be submitted to:

Bill West, Cornerstone Strategies

bill.west@cornerstonestrategies.org

Cornerstone Strategies is our consulting firm acting on behalf of and with NBPHE to manage our search process.

Questions may be submitted any time, but no later than September 1, 2023. A written response to all submitted questions will be provided to all prospective respondents who have notified us of their intent to bid by September 6, 2023. While questions may be submitted any time prior to the deadline, we ask that all questions be compiled and sent in one grouping.

## RFP Format

Please respond with in the following format:

- Cover Letter: brief introductory overview as you may wish, identification of the representative on point for the responding organization, signature confirming compliance with requirements and conditions specified in this RFP document.

- About You
- Capabilities by Service Area
  - Candidate Engagement
  - NBPHE Staff & Volunteer Engagement
  - Partner Integrations
  - Marketing Engagement
  - Finance
  - Reporting
  - Service
  - System & Security
- Study Group Discussion Board
- Project Plan
- Fee Schedule

Each of the above sections are provided below and include a narrative overview as well as intended use cases. For the "Capabilities" sections we have also provided a response template containing requirements and opportunity for descriptive narrative. We have left the other sections open-ended but with information requested.

Where capabilities are specified, you will see an overview with use cases, followed by a response template to indicate if the capabilities are included in your platform or require customization. Included in the template is a narrative section where you have the option of describing your solution.

| Feature | Description | Included* or Custom |
|---|---|---|
| *Feature description* | *Capabilities required or otherwise specified as requested* | *Here indicate if the capabilities are "included" in your platform, or require "custom" development* |
| **Narrative | *You may add a narrative and examples to describe your solution, add color to how you are meeting or exceeding the stated needs* | |

*Note: To be designated as "included": they may be as standard feature or part of what you configure during implementation as a normal part of your process. What is "included" should come with no additional cost unless otherwise specified in the fee section.

**Note: The "Narrative" is an open-ended field. You may add graphics, examples, and overall solutions. You may even propose a different approach that you feel may be a better way to meet the stated need.

## Requirements and Conditions

- Bidder will provide all responses in electronic format by emailing them to the point contact or pre-arranging an alternative file upload process
- NBPHE will not make any payment or reimbursement to respondents in connection with this RFP

- Attachments are allowed in order to provide additional detail, workflow, or user interface examples. Excessive material may not be fully reviewed
- Information included in responses will remain valid for at least 90 days following submission
- Confidentiality. All materials and information shared by NBPHE will be considered confidential and will not be shared publicly nor beyond this RFP process
- Performance reviews. Vendors will be required to participate in period business reviews
- Right to audit. Vendor contracts will include a right to audit all materials related to the service, including but not limited to financial, security, and operational. The costs of such audits will be reasonably covered by NBPHE but resolution to fix any discovered failures will be covered by the vendor. Failure to comply with audits or address issues may result in termination of the contract.
- All processes and accommodations will be in compliance with the then-current Americans With Disabilities Act provisions at a minimum.
- Initial term. The initial term will be at least three years from date of contract execution, plus optional one-year extensions. Renewal terms and notice periods to enable possible transition will be determined during contract discussions.

### Selection Criteria

Selection will be based upon the following criteria:

- Cost: we need to adhere to our funding limits
- Stability of platform / uptime
- Best candidate service, ease of use
- Ease of use, service for NBPHE staff and volunteer
- Ability to customize to our needs
- Security & data privacy
- Qualifications, history of performance

# Response Sections & Requirements

## About You

Please use this section to help us get to know your company, your team, and your vision. At a minimum, please include:

- Experience and at least three references, with emphasis placed upon similar projects. This doesn't necessarily mean public health programs, but client programs with similar projects and goals
- Experience working with certification programs that are NCCA or ISO 17024 accredited, and enabling their accreditation efforts
- Your team. Qualifications, how you structure client support
- Your approach to serving your client programs and their candidates
- Your commitment to accessibility
- Track record of investment and innovation, insight into how you plan to continue to innovate for the benefit of your clients

# Candidate Engagement

This section covers the needs for engaging candidates, from prospective candidates through application, certification, and recertification.

**USE CASES**

- **Prospect**. A prospect is someone who is interested in learning more about the certification but not yet ready to apply. Prospects will be able to create an account where their name, contact information and communications preferences are stored and updated as needed. Prospects may not be ready or eligible to take the DIS certification examination, but they will have access to events, deadlines, resources that support DIS while utilizing the DIS portal. Early engagement of prospects will increase their likelihood of them getting certified and is a key element of this certification's success.

- **Candidate - Initial Certification.** Once ready to apply, candidates will log back into their account to complete an application containing additional demographic information such as date of birth, gender, race/ethnicity, and information as it relates to their work as disease intervention professionals such as education, employer, and supervisor's contact information. Before they can submit their application, the candidate will attest to meeting the initial certification requirements, submit a request for ADA accommodations (if needed), attest to the DIS Standards of Conduct, and review the candidate's Rights and Responsibilities. The candidate will be able to preview their certification exam application prior to submitting it.

  Once the application is submitted, the system will send candidates a message confirming the submission of their application and will send a message to verifiers alerting them about the new application.

  After the review process is completed, the system will send the testing vendor information about the new candidates via an API. Candidates will receive an email letting them know they have been approved to take the exam and a second message with scheduling instructions. Candidates who do not schedule their exam right away will receive periodic reminders encouraging them to schedule their exam.

  Ineligible candidates will receive a message stating that they do not meet the requirements for certification as well as instructions on how they can meet eligibility requirements in the future. Candidates who pass the exam will receive a congratulatory message with information about staying certified through recertification. The testing vendor will send exam scores to the DIS system via an API. Candidates who pass the exam (certificants) will be able to view and download their DIS certification certificate and view their digital certification badge which will include metadata on the knowledge, skills, and abilities required to be a disease intervention specialist.
  Candidates who are not successful taking the exam will receive information about retake options.

- **Certificants– Recertification.** Candidates who pass the exam (certificants) will be able to keep track of their recertification requirements through the system. The certificant will be able to track their progress towards recertification, receive periodic reminders about upcoming

deadlines, upload recertification credits and required documentation. Once a recertification application is submitted, the system will provide the certificant with an email confirming their recertification application was submitted. Once the application is approved, the certificant will receive a congratulatory message confirming their new deadline. Candidates who either do not apply for recertification or do not submit sufficient documentation will receive instructions on how to continue their certification. Candidates who fail to provide a remedy will receive a notification that their status has lapsed. Throughout the lifecycle of the certificants, they will have continuous access to events, deadlines, and other resources. They will also be able to access their account and update their personal and contact information.

- **Credit Hours Tracking.** Certificants will be able to report continuing education credits for DIS recertification. The recertification credits reported will be part of the certificant's system record. The DIS system will also allow links for easy certificant access to continuing education opportunities via disease intervention education related providers. For NBPHE related activities such as webinars and committee participation, staff will be able to pre-assign recertification credits and pre-populate these into program participant's records that are saved in the DIS system which will eliminate the need for certificants to report these credits. The DIS system will also allow staff to easily upload continuing education credits in bulk. Staff will also be able to track continuing education credits by type with the ability to generate real-time reports.

**REQUIREMENTS**

| Feature | Description | Included or Custom |
|---------|-------------|-------------------|
| Program information | Ability to view program information, including process, prerequisites, application forms, and links to related web site information | |
| *Narrative* | | |
| Create profile | Ability to collect full name and additional name fields (nickname, former name), address for both home and employment with preference stated, two email addresses with preference stated, multiple full phone numbers with contact preference stated | |
| *Narrative* | | |
| Demographic data | Ability to collect demographic data such as: birthday, employer, gender, school information, credentials, industry, and citizenship status. Ability to systematically flag and put on hold OFAC-sanction country citizenship | |
| *Narrative* | | |
| Profile modification | Ability to restrict what candidates may modify, role-based permissions for any restricted fields, track history of modifications | |
| *Narrative* | | |
| Languages | English is the only requirement for this RFP, but please outline non-English language capability for possible future use | |

| | | |
|---|---|---|
| *Narrative* | | |
| **Submit application** | Implement required fields, systematically track compliance with required fields and retake policies, ability to save status along the way. Ability to specify and track prerequisite requirements. Ability to flag the application and prevent the next step due to specified restrictions such as incomplete data or not agreeing to data privacy | |
| *Narrative* | | |
| **Document capture** | Ability to upload and store documentation that may be required to prove eligibility, such as employer authorization, education records, or employment status. Please clarify any size limitations and associated fees in the pricing section | |
| *Narrative* | | |
| **Accommodations** | Ability to capture required documentation, note status, implement custom deadlines vs standard process. Ability to track successful completion of an accommodation applied to an exam. Clarify what notification to the delivery provider can be automated vs. manually communicated | |
| *Narrative* | | |
| **Registration windows** | Ability to implement multiple registration and testing periods per year, deadlines for application windows, open enrollment periods, and granting extensions. Registration periods are yet to be determined and the program may become on demand | |
| *Narrative* | | |
| **Status tracker** | Ability for candidates to view the status of their application, including completeness of application, status for eligibility, exam appointment, exam results, and certification | |
| *Narrative* | | |
| **Automated notifications** | Reminder notifications, customized by status in the process: application deadlines, application submission, incomplete applications, eligibility confirmed or denied, exam scheduling deadlines, and requirements for claiming certification | |
| *Narrative* | | |
| **Attestation** | Ability to sign NDAs, attest to the DIS Standards of Conduct, acknowledge receipt of communications | |
| *Narrative* | | |
| **Notice to vendor** | After the review process is completed, the system will send the test administration vendor information about the new candidates via an API | |
| *Narrative* | | |

| | | |
|---|---|---|
| **Candidate notice** | Candidates will receive an email letting them know they have been approved to take the exam and a second message with scheduling instructions. Candidates who do not schedule their exam right away will receive periodic reminders encouraging them to schedule their exam | |
| *Narrative* | | |
| **Merges** | Ability to merge duplicate records. Provide automated search as well as ability to search based on specified criteria. Merge existing records with ability to designate the correct data to retain | |
| *Narrative* | | |
| **Passwords** | Ability to reset a password, including automated forgotten password functionality not needing manual intervention | |
| *Narrative* | | |
| **Suspended status** | Ability to ban eligibility, suspend accounts under security investigation, or create eligibility restrictions | |
| *Narrative* | | |
| **Membership** | Not a requirement for this RFP, please provide optional ability to support membership programs | |
| *Narrative* | | |
| **Candidate status** | Ability to track status of the candidate, to include certified, lapsed, expired, suspended, retired, or deceased | |
| *Narrative* | | |
| **Certification status** | Ability to automatically grant and communicate attainment of certification according to set criteria | |
| *Narrative* | | |
| **Exam data** | Ability to track high-level exam results for a candidate, including exam registration ID, exam name, exam date/time/location, exam version and form, and exam results | |
| *Narrative* | | |
| **Randomized audit** | Ability to randomize selection of certified candidates for audit according to a set %, such as 5% | |
| *Narrative* | | |
| **Certificate printing** | Ability to print the certificate | |
| *Narrative* | | |
| **Certificate ordering** | Ability to order a printed/framed certificate | |
| *Narrative* | | |
| **CEU requirement** | Ability to specify CEU requirements and what will meet CEU specifications. Ability for extensions or waivers as approved by NBPHE staff for life events such as parental care, military service, etc. | |
| *Narrative* | | |

| | | |
|---|---|---|
| **Education partners** | Ability to track official education partners, ability for those partners to systematically upload CEUs | |
| *Narrative* | | |
| **CEU input** | Ability for candidates and NBPHE staff to input CEU attainment, including bulk uploads | |
| *Narrative* | | |
| **Recertification** | Track and enforce recertification requirements and deadlines | |
| *Narrative* | | |
| **Recertification status** | Ability to see progress toward recertification requirements, ideally to include a status bar graphic | |
| *Narrative* | | |

## NBPHE Staff & Volunteer Engagement

This section covers the needs for NBPHE staff and volunteers to interact with the platform to review and approve applications, manage workflows, and manage users and permissions. We also desire the ability to add custom fields, workflows, and processes without accessing support, while at the same time having support and training as needed.

**USE CASES**

**NBPHE Admin User Experience – Admin Console.** NBPHE staff will have access to a console which will allow them to manage the DIS certification process. Staff will be able to access all stored user records, profiles, contact information, demographic data, initial exam applications, recertification applications, and event registrations. Staff will be able to update all user contact information and data as needed through the console. They will be able to create and update email notifications in the console, create and run prospect, candidate, and certificants lists, create and run reports such as candidate data, exam pass/fail status, lapsed, expired, retired, deceased, and recertification statistics. NBPHE staff will be able to manage the initial and recertification application processes, and update certificate templates. Staff will also be able to build events for registration such as webinars, virtual study group sessions, and in-person study group sessions. NBPHE staff will be able to manage DIS volunteer records such as the DIS Governing Council, DIS Advisory Committee, DIS Job Task Analysis Committee, DIS Item Writers and other committees, including individual committee roles and terms of service.

**Verifier's User Experience.** Application verifiers will have access to the DIS portal. The system will notify verifiers when they have been assigned a candidate to review. They will then log into the system, review applications, and submit their decision. Verifiers who do not respond in a timely manner will receive periodic reminders.

**Volunteer Management.** The DIS system will include a volunteer management module where NBPHE staff can maintain and track detailed contact information, meetings, terms of service, and dates of service for groups such as the DIS Governing Council, DIS Certification Advisory Committee, DIS Job Task Analysis Committee, DIS Item Writers. Staff will also be able to share documents with volunteers and maintain meeting minutes for each committee. As the DIS program continues to grow, staff will be able to track additional committees and task forces that are established to support the certification program.

**REQUIREMENTS**

| Feature | Description | Included or Custom |
|---|---|---|
| **Role-based permissions** | Ability staff administrator to add users and assign different levels of permission for viewing and modifying candidate and program information | |
| *Narrative* | | |
| **Document workflow** | Support a document review & approval workflow for any documentation submitted | |
| *Narrative* | | |
| **Application approval** | Ability for Client staff to approve or deny an application, and/or audit documentation, or request additional information from the candidate on any component | |
| *Narrative* | | |
| **Automated approval** | Ability to auto-approve an application if all eligibility criteria are met | |
| *Narrative* | | |
| **Audit** | Ability to randomly select applications for audit | |
| *Narrative* | | |
| **Support** | Please describe your ability to support NBPHE staff in their use and understanding of your platform | |
| *Narrative* | | |
| **Customization** | Ability for NBPHE staff to add custom fields without assistance | |
| *Narrative* | | |
| **Training** | Training modules and ongoing support for NBPHE staff to properly use the system | |
| *Narrative* | | |
| **Volunteer modules** | Ability to host volunteer profiles, volunteer types, and volunteer access permissions. Ability to designate volunteer type and groups, track committee members and terms, and run reports about the volunteer engagement | |
| *Narrative* | | |
| **Candidate support** | What tools does the system have for NBPHE staff to directly support candidates beyond event notification | |
| *Narrative* | | |

## Partner Integrations

NBPHE has existing partnerships we will continue to access for development and delivery of the DIS program, as outlined below. Please confirm willingness to align with the partner teams for the benefit of our collective team and to support our candidates. Please also provide insight into the capabilities you will enable as part of the integrations.

**REQUIREMENTS**

| Partner | Description | Included or Custom |
|---|---|---|
| **Meazure** | Integrate with Meazure's test development and administration platform. Transfer candidate demographics, eligibility information, and exam data | |
| *Narrative* | | |
| **Accredible** | Integrate with Accredible's badging platform. Track status for each candidate - active/lapsed/expired. If you have an alternative to propose, please include the benefits and ability to transfer to the proposed alternative | |
| *Narrative* | | |
| **Multiple providers** | Not required for this RFP, but please indicate the ability to integrate with multiple test delivery systems | |
| *Narrative* | | |
| **Stakeholder systems** | Not required for this RFP, but please indicate the ability to integrate with other systems that may provide authorizations and need to receive candidate information, such as health departments | |
| *Narrative* | | |
| **NBPHE system** | The CMS will be database of record, but we may require the ability to export data into our back-end systems for reporting and compliance tracking | |
| *Narrative* | | |
| **Marketing communications** | Please provide information on any marketing communications functionality embedded in your platform | |
| *Narrative* | | |
| **Payment processing** | Please provide information on payment processing functionality embedded in your platform. Our expectation is that all fee collection, refunds, discounting, and financial reconciliation will occur within the CMS, but will also integrate with the NBPHE platform. Stripe is preferred but we are open to alternatives | |
| *Narrative* | | |

## Marketing Engagement

This section addresses our needs for leveraging the capabilities and data in the CMS for market engagement. We would like to use the system as a CRM to promote the program to prospective candidates, keep applicants informed and progressing, and communicate with key stakeholders, including employers in the form of a public directory for validation of credentials. Please include insight into the level of customization we can leverage to align with our brand.

**USE CASE**

The system will allow NBPHE staff to manage and track email marketing campaigns on the DIS program. Staff will be able to create and maintain email notifications that are transactional and non-transactional in one place. Staff will be able to schedule and send immediate detailed communication and deadlines regarding the DIS certification program to prospects, candidates, and certificants. This will ensure effective engagement of participants in the program.

**REQUIREMENTS**

| Feature | Description | Included or Custom |
|---|---|---|
| **Promotions** | Ability to promote the program to a variety of stakeholder categories and user types, such as prospective candidates, health departments and CEU providers. Includes history of contact and tracking engagement | |
| *Narrative* | | |
| **Automated notifications** | Reminder notifications, customized by status in the process: application deadlines, incomplete applications, eligibility confirmed or denied, exam scheduling deadlines, requirements for claiming certification, lapsed and expired notices, and renewal deadlines | |
| *Narrative* | | |
| **Public directory** | Searchable public directory, with the option to opt in or out. To be accessed by employers such as health departments and regulatory agencies. Include ability to remove candidates for changes in status such as retirement | |
| *Narrative* | | |
| **Surveys** | Ability to create and send surveys to a variety of stakeholder groups such as certificants and education providers. Capture responses and conduct analysis | |
| *Narrative* | | |
| **Opt-out** | Ability to opt out by category: public directory, marketing communications, newsletter, etc. Not a single opt out, candidates can pick & choose | |
| *Narrative* | | |
| **Activity Finder** | We would like the ability to have a searchable database for continuing education credits | |
| *Narrative* | | |
| **Branding - CMS** | Ability to customize CMS interface to NBPHE brand guidelines. Please clarify any associated costs in the pricing section | |
| *Narrative* | | |
| **Branding - emails** | Ability to customize email communications to NBPHE brand guidelines | |
| *Narrative* | | |

# Finance

This section addresses financial capabilities. NBPHE would like to access financial processing systems already embedded in the CMS application to manage all payments, refunds, reconciliation, and discounts.

**REQUIREMENTS**

| Feature | Description | Included or Custom |
|---|---|---|
| **Payment processing** | Ability to collect payment from candidates for applications and exam registration. Ability to process refunds, including automated refund for denied applications. Please specify payment options | |
| *Narrative* | | |
| **Pricing tiers** | Ability to set application and exam pricing by geography or other variables | |
| *Narrative* | | |
| **Discounts** | Ability to support discounts | |
| *Narrative* | | |
| **Vouchers** | Ability to produce vouchers and coupon codes for distribution, valid against application and exam registration fees | |
| *Narrative* | | |
| **Currencies** | USD is the only currency required for the RFP, but please indicate capability to process other currencies | |
| *Narrative* | | |
| **Invoices** | Ability to generate invoices for dues owed | |
| *Narrative* | | |
| **Extensions** | Ability to charge for extensions or moving eligibility to a subsequent registration window | |
| *Narrative* | | |
| **Reconciliation** | Please indicate your standard process for reconciling fee collection and invoicing for service | |
| *Narrative* | | |

# Reporting

This section outlines requirements for reporting capabilities to enable full visibility into program operations, including data analytics. The team will also need to produce ongoing, accurate information for stakeholder groups.

**USE CASE**

The DIS system will include pre-built reports and will allow staff to develop their own reports which will enable in-depth analysis of the progress of the DIS certification program. Staff will be able to easily access and analyze statistical data as it relates to exam prospects, candidates, certificants, lapsed, expired, and retired. The reports will also enable staff to review data by regions, state, month, and year. Staff will be able to project program participation using the available data.

**REQUIREMENTS**

| Feature | Description | Included or Custom |
|---|---|---|
| **Configurable searches** | Ability to generate custom reports, specifying candidate data, partner data, and program information including constituents, program, application status and certification/recertification status. Includes use of wildcards | |
| *Narrative* | | |
| **Audits** | Identify data out of compliance, produce data sets necessary to support audits | |
| *Narrative* | | |
| **Duplicates** | Flag possible duplicate records | |
| *Narrative* | | |
| **Financials** | Summary of transactions, including by discount and voucher type | |
| *Narrative* | | |
| **Incidents** | Summary of incidents, including by status, type, and average time to resolution, including security incidents and investigations | |
| *Narrative* | | |
| **Access to data** | Ability for NBPHE staff to access all data at any time, including export to CSV format | |
| *Narrative* | | |
| **User interface** | Intuitive, easy to use interface for NBPHE staff | |
| *Narrative* | | |
| **Create Dashboards** | Ability to create custom dashboards and custom reports that cross modules and combine data. Dashboards must have the ability to filter data and do a deep dive into the source data. Please address what is configurable vs. when we will need to submit a ticket for customization | |
| *Narrative* | | |

| | Summary reporting by configurable date range for key program information, including:<br>- candidates in the system but not in process toward certification<br>- candidates in process but not approved<br>- new, eligible candidates<br>- retesting candidates<br>- upcoming recertification candidates<br>- recertification applications<br>- Statistics on successful recertifications vs. candidates not completing<br>- Pass and fail statistics by key demographics | |
|---|---|---|
| **Summary data** | -Lapsed and expired certificants | |
| *Narrative* | | |

## Service

This section outlines the commitments to a positive candidate and staff experience, the ability to track incidents through resolution, and expectations for attentive service. We also seek to understand the metrics you track to verify excellent service and to which of those you are willing to commit under a Service Level Agreement (SLA). We desire to apply logic to any metrics or financial incentives, ensuring they are in line with actual impact, not just for penalizing our partner.

**REQUIREMENTS**

| Feature | Description | Included or Custom |
|---|---|---|
| **Incident management system** | Ability to track candidate requests and inquiries including the date submitted, category, status, description, assignee, responses, and outcome | |
| *Narrative* | | |
| **Incident notes** | Ability to enter case notes and documents for evidence | |
| *Narrative* | | |
| **Ability to open incidents** | Ability for partners, candidates, or client staff to open incidents | |
| *Narrative* | | |
| **Incident status** | Ability to change the priority status and assignment for an incident | |
| *Narrative* | | |
| **Responsiveness** | Please describe your support timeframes | |
| *Narrative* | | |
| **Service Level Agreement** | Please specify the support timeframes you are willing to include in a service level agreement. | |
| *Narrative* | | |
| **Customer Service** | Describe your customer service capabilities to support candidates - call center, chat, email | |

| *Narrative* |
|---|

## System & security

This section is intended to capture your system and security processes not already specified in previous sections, including adherence to local law and industry standards.

**REQUIREMENTS**

| Feature | Description | Included or Custom |
|---|---|---|
| **Legal compliance** | Ability to fully comply with GDPR and any applicable U.S. state laws regarding data retention, privacy, and security | |
| *Narrative* | | |
| **Certifications** | Please list any security or data privacy certifications attained for your system and business | |
| *Narrative* | | |
| **Ability to audit** | Ability for NBPHE to conduct a security audit at least once/year | |
| *Narrative* | | |
| **Redundancy** | Please describe system and data redundancy and back up processes | |
| *Narrative* | | |
| **Security controls** | Please describe system security controls | |
| *Narrative* | | |
| **System maintenance** | Please describe your system maintenance and upgrade process, including approach to downtime notification and ongoing communication | |
| *Narrative* | | |
| **Client customization** | Please describe how you comply with and prioritize custom client requests | |
| *Narrative* | | |
| **Mobile** | Mobile-friendly interface | |
| *Narrative* | | |
| **Upgrades** | Please describe your process for upgrades. How customers benefit from new features and how releases won't break processes and reports already set up | |
| *Narrative* | | |
| **Identity management** | Please describe your approach to identity management | |
| *Narrative* | | |
| **Cloud solution** | Cloud-native solutions | |
| *Narrative* | | |
| **Encryption** | Data encryption at rest and in transit, ability to anonymize data | |

| | | |
|---|---|---|
| *Narrative* | | |
| **Portability** | Data portability and system interoperability | |
| *Narrative* | | |
| **APIs** | Loose coupling REST APIs | |
| *Narrative* | | |
| **Operating system compatibility** | All major operating systems, devices and browsers supported | |
| *Narrative* | | |
| **ADA** | ADA compliance | |
| *Narrative* | | |
| **Up time** | High availability (99.9%) and scalability | |
| *Narrative* | | |
| **Logging** | Event logging and audit trails | |
| *Narrative* | | |
| **Architecture** | Zero-trust architectures preferred | |
| *Narrative* | | |
| **Event management** | Not a requirement for this RFP, but please describe your ability to support event management, such as webinars and conferences | |
| *Narrative* | | |
| **Online courses** | Ability to host online course content and delivery | |
| *Narrative* | | |

## Study Group Discussion Board

The DIS system will include a study group discussion board where candidates for the DIS certification exam are able to communicate with each other, ask questions, and provide answers which take place through user posts that are then part of a thread. Candidates will read the posts and threads, see other perspectives, and provide a response to the posts. This will allow candidates to actively participate and have conversations without being physically online at the same time. The study group discussion board will add value to the candidate's exam preparation experience. Candidates will also feel less anxiety and feel better prepared for the DIS certification exam.

Please describe your ability or options to enable a discussion board to support our candidates.

## Project plan

Please provide your approach to implementation and the overall management of the program. Please include a description of the team you will assign and how they will interact with NBPHE to ensure clarity, identify obligations for each party involved, and provide milestones to track progress.

# Fee schedule

Please provide your fee schedule to cover all stated requirements and options you may have presented, to include at a minimum:

- Startup and integration fees
- Licensing and user fees
- Any activity-driven dependencies, such as volume tiers for applications
- Include cost by task and overall, for each element of the proposal that incurs an additional fee for configuration or customization
- Fees associated with payment processing or system-generated marketing activities
- Any other fees to cover the scope presented in this RFP

If pricing is based on minimums such as number of estimated applicants/certificants, include all costs if minimums are not met and/or exceeded.

Please provide an estimated total cost of ownership for implementation and year one vs. ongoing years.

This is a startup program with small volume forecast for the first 1-2 years. We have attempted to be comprehensive in our stated needs and requirements. It is our expectation that this fee schedule will cover the entire solution being proposed, with options or dependencies as may apply.