Request for Proposal for Digital Credentialing Platform

About The Institute for Functional Medicine (IFM)
As the leading voice for functional medicine for more than 30 years, The Institute for Functional Medicine (IFM) is advancing the transformation of healthcare for patients and practitioners worldwide. IFM is a 501(c)(3) nonprofit organization, providing functional medicine educational programs directly accredited by the Accreditation Council for Continuing Medical Education (ACCME).

About Functional Medicine
As a catalyst in the transformation of healthcare, functional medicine treats root causes of disease and restores healthy function through a personalized patient experience. From chronic illness to disease prevention, functional medicine systematically addresses the unique physical, mental, and emotional needs of all patients. By understanding each patient's genetic, environmental, and lifestyle influences, functional medicine is a vital partner to conventional medicine that delivers transformative care to promote optimal health and well-being.

Our Mission: IFM's mission is to ensure the widespread adoption of functional medicine.

Our Vision: IFM believes health and vitality are essential to the human spirit. IFM's vision is to advance the highest expression of individual health. Our mission is to ensure the widespread adoption of functional medicine.

Our Work: IFM supports the confident and competent practice of functional medicine through high-quality education, industry-leading certification, partnerships across medical disciplines, and advocating on behalf of functional medicine clinicians and patients around the globe. Read more about the organization's work in our 2024 Impact Report.

How We Work: IFM is a 501(c)(3) nonprofit organization committed to providing equal opportunities for all. We are a fully remote workforce with employees across time zones in the USA. We work collaboratively with our vendors and expect open two-way communication between IFM and the vendors we work with.

Learn more about us at IFM.org/About.

About this RFP

BACKGROUND

IFM certifies a multi-disciplinary audience of health practitioners with varying scopes of practice and has issued the IFM Certified Practitioner (IFMCP) credential to qualified health providers since the

first class of certificants in 2013. The IFMCP credential was based on practitioners completing IFM's core educational curriculum and passing both a case study and a written exam. The IFMCP program is retired as of July 2025.

In 2023, IFM began the process of separating its educational programs from certification requirements in alignment with NCCA accreditation standards. Launching in 2026, the new Functional Medicine Certification Program will offer two different certification designations for health practitioners based on their primary degree and scope of licensure.

The new credentials are the Functional Medicine Certified Professional™ (FMCP) and Functional Medicine Certified Professional - Medical™ (FMCP-M). As part of this program evolution, IFM will transition existing certificants into one of the two new credentials that are in development, based on their degree/licensure type. Existing and new certificants will be required to renew every 6 years to maintain their credential.

IFM will conduct a pilot of the new certification exams in early 2026 and will fully launch the new program in late 2026. IFM delivers the exam twice annually, typically in April/May and October/November. On an annual basis, the volume is approximately 300 newly issued credentials. The new certification program will require recertification in 6-year cycles. With approximately 3,000 existing certificants, volume is expected to be approximately 400 – 500 (increasing gradually over time) recertification badges issued annually starting in 2028. Please note there will be a smaller number of recertification badges issued in 2027, expected to be approximately 150.

Detailed information about the new Functional Medicine Certification Program can be found online at https://www.ifm.org/certification.

THE PROBLEM WE ARE SOLVING

IFM is making significant changes to the current certification program and has identified credential issuance as an area of opportunity. Currently, IFM issues physical certificates by mail and a password protected digital package sent in a PDF to certified individuals. Certified individuals are largely tracked on an Excel spreadsheet.

IFM is seeking a digital badging platform that will enable our organization to award certificants digital credentials that recognize their achievements, provide verifiable proof of skills, knowledge and abilities, and increase visibility in professional networks.

The focus of the RFP is to identify and select a Digital Badging vendor that can:
- Provide both a badge issuing and badge hosting platform
- Issue a minimum of two secure, verifiable, traceable and custom-branded digital badges (FMCP and FMCP-M) to accessible candidate profiles

- Provide an underlying industry-standard badge platform that supports data reporting and integration requirements, is GDPR compliant, conforms with WCAG 2.1 AA, and adheres to best data and security practices.
- Integrate with IFM's CMS.
- This project will involve the import of approximately 3,000 existing certified professionals. Additionally, annual volume is expected to start at approximately 300 newly certified professionals and an average of 570 certification renewals.

SCOPE OF WORK

The scope of work for the Digital Badging Platform must contain the following elements:
- Discovery and Pre-Development
- Development and Deployment
- Staff Training and Support
- Platform Subscription, including Regular Maintenance and Administration
- Badge Issuance
- Opportunities for Enhancement

Functional Requirements:

	Feature	Description	Importance
1	Issue Badges	After a candidate earns the FMCP or FMCP-M credential, a digital badge is issued. Ability to: • Integrate with CMS, to issue digital badge after earning FMCP or FMCP-M designation. Include unique credential ID from CMS. Credential valid for 6 years. • Bulk upload and publish • Maintain badge likeness, including trademarks, as needed after issuance.	Required
2	Account creation	Earners may, if desired, create an accessible account associated with their digital badge.	Required
3	Multiple Certifications	Two designations available; FMCP and FMCP-M. Ability to segment audience and create unique branding for each designation. Badges can include	Required

		detailed descriptions of the criteria to become certified.	
4	Credential Status	Integration with CMS to update credentials. Credential status is updated when credentials are: - renewed, credential is valid for another 6-year cycle. Credential ID remains the same, new expiration date is published. - Lapsed, the credential is no longer active. Credential ID remains the same. - Renewed from Lapse, credentials are valid. Credential ID remains the same, date may be updated. - Expired, the credential is no longer active. - Certify from expired, new credential ID and cycle. - Revoked, the credential has been revoked.	Required
5	Email automations	Admin users can configure auto-generated and on-demand candidate email notifications with respect to digital badges. Candidate receives auto-generated emails at designated steps in workflow.	Required
6	Badge Sharing	Ability for certificants to share badges with their audiences via social channels and email.	Required
7	Badge Verification	Digital badges can be verified by third parties to ensure that the certificant's details (legal name, Unique ID, Expiration date, designation) match the badge from issuer. Badge use and display is traceable by IFM.	Required
8	Digital certificate	Earner has the option to print a paper certificate. Certificate can be	Preferred

		appropriately branded and customized to include, in addition to certificant data, issuer information, credential name, and expiration date.	
9	Professional Directory	Third parties may search for and verify credential holders using an online directory. Directory can be used to verify status of certificants and include name (first, last), credential #, location, credential issue date, credential expiration date)	Preferred/Enhancement
10	Admin Dashboard	Admin has access to a dashboard that provides key information about issued badges and analytics. Dashboard offers information such as badges sent, accepted, shared, as well as email and social engagement.	Required
11	UX/UI and Branding	Ability to • Customize branding and white labeling of digital badges and web platform • Customize and design digital certificates • Create custom fields and attributes • Support digital wallets Conforms with WCAG 2.1 AA requirements.	Required
12	User Roles	The digital badging platform can provide user access permissions based on: • User role • Feature access • Credentials and related groups • Segmented audience to enable IFM to manage the system while also limiting access to areas of relevance.	Required
13	Continued Development and Support	Digital Badging Platform continues to invest in upgrades and features that are current with industry standards. Vendor	Required

		regularly shares roadmap development with IFM team on a bi-annual basis. Vendor provides robust tier-1 level support for end-users (certificants), including access to a help center in addition to supporting IFMs adoption of the system.	
14	System Training	IFM's system administrators understand the features and functionality of the digital badging platform. Vendor delivers training to appropriate staff on how to use the system and provides ongoing support for use and maintenance.	Required
Future State			
15	Additional Badges	Additional departments may use badges for learning programs. When a learner completes education, they receive a completion badge.	Enhancement
16	Learning Pathways	Available courses/programs to enroll towards certification. Link badges to programs to support learners in identifying and pursuing continued professional development.	Enhancement
17	Languages	Additional languages may be explored, starting with Spanish. Badge earners can view their badge and online portal in English or other languages.	Enhancement

Not in scope:
- Association or membership management
- Recommendations for CMS, LMS or CRM providers
- E-commerce
- Events management
- Educational management

PROPOSAL DELIVERABLES

IFM seeks written proposals that address each element of the above Scope of Work and Functional Requirements. The proposals should include the following deliverables:

- **Discovery:** Gain an understanding of IFM's business and considerations that may inform how to meet project goals and objectives.
- **Project Approach:** Describe your proposed approach to fulfilling the project objectives and recommended methodologies or strategies.
- **Ability to provide the Scope of Work.** Provide references and credentials that show you and your team can deliver the scope of work, including robust customer support for IFM staff and credential holders.
- **System Requirements:** Provide proof of conformity with WCAG 2.1 AA and Accessibility Conformance Report (ACR) completed on a VPAT.
- **System Demonstration:** The proposal should provide a recorded video, that is no more than 10 minutes, of the digital badging platform. The video should include issuing, receiving, accepting, sharing, and tracking a badge. Please provide a link to view this video on a streaming platform like YouTube, Vimeo, or similar. Please note: this video does not need to be specific to IFM and can be previously recorded material.
- **Budget Breakdown:** Provide a comprehensive breakdown of the costs and any pricing adjustments for multi-year contracts up to five (5) years, including:
  - Per-user license fees
  - Badge delivery fees
  - One-time costs (e.g. implementation, integration, upgrades, professional services)
  - On-going maintenance and support costs
  - Additional module pricing and Add-ons
- **Contract Considerations:** Provide a detailed timeline of your contracting process, and Word copies of your contract template, proposal, scopes of work, data processing addendum and any other contractual documents that would govern the relationship.
- **Qualifications and Experience:** Highlight your organization's relevant qualifications, expertise, and past experience in delivering similar projects.
- **Timeline:** Present a detailed project timeline, including milestones, key deliverable target dates, and the project's estimated duration.
- **Optional Aspects:** If your proposal includes any optional elements beyond the specified scope, clearly outline the additional time and costs associated with each optional aspect.
- **Change Management:** IFM understands that business requirements may change and that could affect project size, scope, and cost. IFM requests that bidders include information in their proposals about change management processes.
- **References:** Include three (3) references from previous clients or projects to demonstrate the successful execution of similar initiatives.

BUDGET

IFM has allocated a budget of up to $30,000 in year one (1) for this project.

RFP TIMELINE

Request for Proposals issued to prospective vendors	September 2, 2025
Proposals due to IFM	Sept 26, 2025
Review of proposals by IFM	Oct 1 - 15, 2025
Communicating with vendors	Oct 20 - 24, 2025
Presentations/interviews by selected finalists	Oct 29 - Nov 11, 2025
Final selection (tentative*)	Nov 24, 2025
Contract to be drafted	Nov 25 – Dec 15, 2025
Contract signed by both parties (tentative*)	Jan 15, 2026
Project to be completed during:	Jan – March 2026

*Tentative timeframes are subject to change. IFM will inform responding vendors of any revisions. If timeline shifts due to delays in contract negotiations not caused by IFM, vendor agrees to hold price in their original offer firm.

PROPOSAL EXPECTATIONS

Proposals should demonstrate:
- Expertise conducting similar certification projects that focus on integrating systems to issue credentials.
- Experience working with organizations that certify practitioners; non-profit healthcare organizations preferred.
- Experience working with organizations with more than one department issuing badges.

Proposals will be evaluated based on the following criteria:

- **Project Approach:** How clearly does your proposed approach explain how you would fulfill the project objectives and recommended methodologies or strategies.
- **Ability to provide the Scope of Work.** How closely does the proposal meet the needs of the Scope of Work.
- **System Requirements:** How compliant is your system with IFM minimum compliance standards.
- **System Demonstration:** How closely does the video demonstration meet the UX/UI needs of the IFM team.

- **Budget:** How closely does the proposed budget and cost breakdown align with IFM's financial goals.
- **Contract Considerations:** Timing of the contract process to meet our implementation timeline, ability to comply with laws governing the relationship, ability to demonstrate compliant data security and privacy practices, willingness to comply with IFM's policies, requirements and standards for contracting.
- **Qualifications and Experience:** The depth of qualifications, expertise, and past experience conducting similar projects.
- **Optional Aspects:** The potential value offered by any optional aspects proposed beyond the scope of work.
- **Timeline:** How quickly a project of this size/scope could be implemented.
- **Change Management:** Is there a clear and formal process for handling change management if the scope of the project or business requirements change during development or implementation.
- **References:** Feedback received from previous clients.

Vendor Interviews

Promising vendor partners will be invited to interview via video conference to further discuss the scope of work between Oct 29 - Nov 11, 2025.

CONTRACT TERMS AND CONDITIONS

To be discussed upon selection of consultant.

PROJECT TIMELINE

Project to commence: January 2026
Project to complete: March 2026

SUBMISSION GUIDELINES

- Proposals must be submitted as a PDF via email to Abigail Menchel, Manager of Credentialing, at abigailmenchel@ifm.org by **Friday, September 26, 11:59 pm ET.** Late submissions may not be considered for evaluation.
- IFM reserves the right to accept or reject any proposal without assignment of reasons for so doing.
- There is no provision for reimbursement by IFM of costs incurred by the bidder in responding to this solicitation.

- The bidder should acknowledge, if awarded the contract, that they will: function as an independent contractor in the conduct of this project and assume full responsibility for all actions, damages, injuries, etc. and at all times comply with all laws, rules, and regulations.
- The proposal should be prepared in conformance with the guidelines stated in this RFP.

CONFIDENTIALITY OF RESPONSES

All information provided in response to this RFP will be treated as confidential and used solely for evaluation purposes. Any proprietary information should be clearly identified as such.

POINT OF CONTACT

Direct questions regarding this request for proposals to Abigail Menchel at abigailmenchel@ifm.org. Expect a response within three business days.