



REQUEST FOR PROPOSAL (RFP) FOR CREDENTIALING PROGRAM DEVELOPMENT CONSULTANT

Issue Date: March 25, 2026

Response Date: April 24, 2026

1. INTRODUCTION

The Unclaimed Property Professionals Organization (UPPO) invites qualified firms and consultants with proven experience in credentialing program development, assessment design, and professional certification planning to submit proposals to assist UPPO in creating a new self-accredited professional credential for the unclaimed property industry.

UPPO seeks a partner capable of guiding a diverse volunteer task force through the design, planning, and development of a full credentialing framework, leveraging existing educational content while building a credible, scalable, and financially sustainable program.

2. BACKGROUND ON UPPO

Unclaimed Property Professionals Organization (UPPO) is the leading association for unclaimed property compliance and advocacy in the United States and Canada. UPPO provides education, networking, regulatory insight, and professional leadership within the unclaimed property sector.

Historically, UPPO has offered a certificate program featuring training and knowledge assessments. This content will serve as a foundation for developing a formal, multi-tiered professional credentialing program.

To date, UPPO has:

- Surveyed membership and corporate leadership regarding interest, pricing tolerance, and expected participation.
- Gathered external stakeholder feedback from non-members and partners.



- Evaluated third-party accreditation options and determined they are not financially viable at this time.

UPPO now seeks professional support to move into a structured development phase.

3. PROJECT OBJECTIVES

The selected partner will:

- Guide UPPO through structured development of a new self-accredited professional credential.
 - Provide expert guidance, recommendations, and project planning.
 - Build a high-quality, industry-recognized credential aligned with best practices and self-accreditation standards.
 - Ensure the program is operationally sound, financially sustainable, and scalable for long-term growth.
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4. SCOPE OF WORK

The selected firm will provide services that include, but are not limited to, the following:

4.1 Project Planning, Facilitation & Management

- Develop a comprehensive project plan and timeline for credential development and implementation.
- Facilitate structured working sessions with the UPPO Credentialing Task Force and leadership.
- Provide project management tools (e.g., Gantt charts, dashboards, timelines, and workflows).

4.2 Credential Framework Design

- Recommend an overall credential structure (e.g. roles/responsibilities, tiers/levels, renewal cycle).



- Develop a competency model, knowledge domains, and learning outcomes for the credential.
- Align the credential framework with industry best practices (e.g., ANSI/ISO 17024 principles, where applicable).

4.3 Content Development & Volunteer Coordination

- Guide UPPO volunteers in creating and refining questions, content, and assessment materials.
- Train volunteers on item-writing standards, basic psychometric concepts, and content validity.
- Leverage existing UPPO certificate program materials and content as a foundation.

4.4 Assessment & Testing Methodology

- Recommend and document assessment design options (e.g., multiple-choice exams, case studies, performance assessments).
- Identify and compare testing modalities (online, remote-proctored, in-person testing centers), including cost implications.
- Provide guidance on item banking, exam security, scoring models, and exam maintenance.

4.5 Technology & Vendor Recommendations

- Advise on technology platforms (e.g., LMS, certification management systems, testing platforms).
- Recommend systems for item banking, candidate tracking, renewal management, and digital credentials.
- Incorporate AI-enabled tools and automation where appropriate to enhance efficiency and data management.

4.6 Budget & Financial Modeling

- Develop an implementation and ongoing maintenance budget for the credentialing program.



- Provide pricing recommendations for credential candidates, including scenarios and sensitivity analysis.
- Support the UPPO Task Force in preparing financial presentations for the Finance Committee and UPPO Board.

4.7 Governance, Policies & Compliance

- Develop a program governance structure, including roles, committees, and decision-making processes.
- Draft policies for applications, eligibility, scoring, appeals, renewal/recertification, and ethics/conduct.
- Assist in drafting a Credential Program Handbook or comparable documentation for candidates and stakeholders.

4.8 Deliverables Summary

The final deliverables will include, at a minimum:

- Credential Framework Blueprint.
- Competency Model and Assessment Plan.
- Project Plan and Implementation Roadmap.
- Budget and Financial Model (implementation and ongoing operations).
- Governance and Policy Framework, including recommended documentation.
- Technology and Vendor Recommendations.
- Final written report and presentation to UPPO leadership and the Board.

4.9 Optional Extension: Ongoing Management

As an optional second phase, UPPO may contract with the selected firm to provide ongoing **Credentialing Program Manager** services, including:

- Program launch support (e.g. to include marketing guidance).
- Candidate and exam cycle management.
- Renewal and recertification management.



- Metrics tracking and reporting.
- Continuous program improvement.

Vendors are encouraged to include this as an optional, separately priced section of their proposal.

5. VENDOR QUALIFICATIONS

Vendors must demonstrate the following competencies:

- Proven experience developing, managing, or consulting on professional credentialing or certification programs.
 - Expertise in assessment design, psychometrics, test development, and program governance.
 - Experience working with volunteer committees or associations.
 - Strong facilitation and stakeholder management skills.
 - Demonstrated ability to develop financial models for credentialing programs.
 - Strong technology and AI-related capabilities, including use of digital platforms, automation, and data management tools.
 - Experience in regulated or compliance-focused industries is preferred.
 - Experience working with member-based nonprofit organizations is beneficial.
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6. PROJECT TIMELINE

UPPO anticipates selecting a vendor and beginning work according to the following schedule (UPPO reserves the right to modify):

- RFP Issued: March 25, 2026
- Vendor Response with Intent to Bid Period: Weeks One to Two
- Vendor Q&A Period: Weeks One to Two
- Proposals Due: April 24, 2026



- Finalist Interviews (if needed): Weeks Six to Ten
- Vendor Selection & Notification: Week Twelve
- Contract Execution: Week Twelve to Sixteen
- Project Kickoff: Week Twenty
- Expected Project Duration: Six to Nine Months

Vendors may propose alternative timelines based on methodology and resource capacity.

7. PROPOSAL REQUIREMENTS

Proposals must include the following components:

1. Company Overview

- Background, history, organizational structure, and relevant experience.

2. Team Qualifications

- Biographies and roles of key personnel assigned to the project.

3. Project Approach & Methodology

- Approach to credential development, including framework, assessment, governance, and technology.
- Approach to volunteer and stakeholder engagement.

4. Assessment & Technology Strategy

- Recommended assessment approach.
- Proposed or recommended technology platforms.

5. Timeline & Workplan

- Proposed schedule, phases, and milestones.

6. Pricing & Budget

- Fixed-fee and/or hourly models, with itemized costs by phase.
- Any additional or optional cost items.



- Anticipated payment schedule and terms and conditions.

7. Optional Ongoing Program Management

- Proposed scope and pricing for Phase 2 (post-launch support, if applicable).

8. References

- At least three client references for similar projects.

8. PROPOSAL SUBMISSION INSTRUCTIONS

Proposals must be submitted electronically in PDF format to:

Email: shannon@uppo.org; Jwaryjas@jonesday.com

Subject Line: “RFP Response – UPPO Credentialing Program Development Consultant”

Proposal Deadline: April 24, 2026

Late submissions may not be considered at the discretion of UPPO.

9. EVALUATION CRITERIA

Proposals will be evaluated based on, but not limited to, the following factors:

- Relevant experience developing similar credentialing programs.
 - Quality, clarity, and feasibility of the proposed methodology.
 - Expertise and qualifications of the proposed project team.
 - Strength and relevance of references and past performance.
 - Value and transparency of the cost proposal.
 - Ability to meet timeline and project management expectations.
 - Demonstrated understanding of nonprofit and volunteer-driven environments.
 - Technical and AI capabilities.
 - Overall fit with UPPO’s mission, culture, and long-term objectives.
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10. CONTACT FOR QUESTIONS

All questions regarding this RFP must be submitted via email to:

Contact Name: Jennifer Waryjas

Email: Jwaryjas@jonesday.com

Deadline for Questions: April 7, 2026

UPPO may, at its discretion, share responses to questions with all interested vendors.

11. RIGHTS RESERVED BY UPPO

UPPO reserves the right to:

- Reject any or all proposals.
- Request additional information or clarification from proposers.
- Modify the scope of work before or after proposal submission.
- Negotiate scope and pricing with one or more proposers.
- Cancel the RFP process at any time for any reason without liability.