



Request for Proposal for Credential Management System (CMS)

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 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. 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 DEIB Commitment: The Institute for Functional Medicine (IFM) affirms its commitment for a more diverse, equitable, and inclusive (DEI) future for the functional medicine and wellness field. Through creating a culture of belonging (B) for its team members, IFM will partner with others in our collective responsibility to help advance health equity for all patients, practitioners, and individuals worldwide. IFM encourages small businesses, which are minority- or women-owned, or located within low-to moderate income communities, to apply. Read our full commitment statement [here](#).

Our Work: IFM works to advance education and training, clinical patient care, research, and outcomes in functional medicine worldwide. We empower confident and competent practitioners, advance health equity, increase access and improve the overall delivery of patient care. Read more about the organization's work in our [2020-2021 Annual Report](#) and our [2022 Impact Report](#).



How We Work: As both a federal contractor and an organization that is committed to providing equal opportunities for all, we work collaboratively and expect open communication from our vendors, just as we would expect to our vendors. We are a remote work force, with employees all over the country working in different time zones.

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.

In 2023, as a result of a comprehensive program evaluation and analysis conducted by SeaCrest Consulting, IFM initiated a formal Job Task Analysis (JTA) to develop and validate the competencies of a functional medicine practitioner. As a result of the JTA, IFM identified two sets of competencies based on differences in licensed practitioners' scope of practice. Additionally, IFM began the process of separating its educational programs from certification requirements. Thus, IFM is evolving its current IFM Certification Program into the Functional Medicine Certification Program in alignment with testing industry standards and best practices.

The new program will offer two certifications going forward: Functional Medicine Certified Professional (FMCP) and Functional Medicine Certified Professional - Medical (FMCP-M). The new program will require that candidates meet eligibility requirements and take a written exam to earn certification. As part of this work, IFM will transition existing certificants into one of the two new credentials that are in development, based on their degree/licensure type.

IFM will conduct a pilot of the new certification exams in late 2025 or early 2026 and will fully launch the new program in 2026.

IFM delivers the exam twice annually, typically in April/May and October/November. On an annual basis, certification application volume is approximately 750-800 applicants, and testing volume is typically between 300-350 examinees.

Detailed information about the evolution of IFM's certification program can be found online at www.ifm.org/fmcp.

THE PROBLEM WE ARE SOLVING

Due to the significant changes to the current certification program, IFM has a roadmap for where it needs to go but is open to the best way to achieve its goals. Currently IFM uses a CRM (HubSpot) but



does not use a Credential Management System (CMS). Certified individuals are tracked on an Excel spreadsheet outside of the CRM.

IFM is seeking a software solution that can automate the certification application, exam scheduling and administration, credential issuance, and credential maintenance and renewal processes.

The focus of the RFP is to identify and select a CMS vendor that can:

- Develop, implement, and support the system. The system shall include a branded on-line portal, on-line application processes (both initial certification and renewal) for the Functional Medicine Certified Professional (FMCP) and Functional Medicine Certified Professional - Medical (FMCP-M) credentials, and an underlying industry-standard enterprise database that supports all application data, reporting and integration requirements, is GDPR compliant, WCAG 2.0 compliant, and adheres to best data and security practices.
- Integrate with IFM's current CRM, Hubspot, the IFM website for product purchase, an LMS, and the test delivery provider.
- This project will involve the import of approximately 3,000 currently certified IFMCP holders into the CMS, issuing them the appropriate designation (FMCP or FMCP-M) after verifying their highest degree/license and that their license is still active and in good standing.

SCOPE OF WORK

The CMS must contain the following elements:

- On-line portal which allows applicants to apply for certification, including providing evidence of compliance with eligibility requirements;
- On-line portal which allows applicants to apply for certification renewal, including submission of Professional Development Hours (PDH) in compliance with maintenance of certification requirements;
- Applicant Dashboard which provides regular feedback about the status of individual applicants (initial certification and certification renewal), status of credentials issued, and any actions required to earn or maintain the credential;
- Allow IFM to electronically communicate with all applicants via individual or email blast, email automations, and dashboard;
- Integration with:
 - Test delivery provider (Prometric) for exam scheduling and results
 - The IFM website for payment processing through existing e-commerce
 - IFM's existing CRM (Hubspot)
 - IFM's [existing Find a Practitioner](#) online portal for the public to verify credentials
 - A Learning Management System (LMS). Note: IFM is currently in process of seeking a new LMS provider and anticipates launch in late 2025/early 2026.*
- Ability to

- Designate a percentage of applications (initial certification and certification renewal) that may be audited for compliance with program requirements;
- Extend the expiration date of a credential per approved extension requests;
- Lapse/suspend a credential that is not renewed by its expiration date;
- Revoke a credential for disciplinary or other actions;
- Track complaints, suspensions and revocations of credentialed individuals;
- Issue digital badges or integrate with a digital badging provider;
- Generate reports based on available data.

*Not immediately required but preferred.

Functional Requirements:

| Feature | | Description | Requirements |
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| 1 | Account creation | Currently practitioners create an account on the IFM website. They should be able to login/create account on the IFM website then Single Sign On (SSO) to the CMS. | The certification application will include legal first and last name, address, email, telephone, |
| 2 | Application fee | Candidate pays required application fee before starting the application. | Payment is required to begin application. Integration with IFM website to process application payment via Product page. |
| 3 | Academic requirement | Applicant must have minimum academic degree | Enter type of degree (drop down), issuing institution (open text), date of graduation (select month, year); upload diploma/transcript; |
| 4 | Licensure requirement | Applicant must have an active healthcare license. IFM does accept applications from non-U.S. practitioners which require further levels of review. | Select highest level of active licensure (drop down, single select); additional degrees/licenses (drop down, select all that apply). Select country/state(s) where currently licensed (drop down), current license # (open text) and expiration date (select month, year) |
| 5 | Additional Information | Additional demographic information to collect about practice setting, specialty (e.g. | Select primary practice setting (drop down single select), select specialty (drop down, select all that |

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| | | family medicine, integrative medicine), and geography. | apply), and geographic region (drop down single select). |
| 6 | Functional medicine training requirement | Applicants need to document a minimum of 100 hours of functional medicine training | Applicants can enter the name of training provider (open text), date(s) of course, and total hours earned (open text numerals only). Upload certificate/registration or other documentation. Can add additional providers or courses until minimum 100 hours is met. Data validation on the 100 hour minimum. *Opportunity to integrate with IFM's LMS to auto-populate completed IFM courses. |
| 7 | Reasonable accommodations | Request for testing accommodations as part of application process | Applicant can indicate need for reasonable accommodations (y/n), select requested accommodation (drop down); enter reason for accommodation (open text); and upload 3 rd party documentation to support request |
| 8 | Attestation and agreements | Required for application submission | Applicant agrees/attests to program policies, confidentiality, etc. |
| 9 | Application submission | Applicant can save progress and return to application until complete. | Application can only be submitted once all requirements are met and required information is provided. |
| 10 | Application review/audit | Currently IFM reviews and approves all applications submitted. May move to % audit review in future. | Either all submitted applications OR applications selected for audit are in queue for review. Applications not selected for audit are auto-approved. |
| 11 | Additional Candidate Information | If an application under review is missing components, or a document is not in compliance, more info can be requested from an admin user of the system. | Candidate gets notified that additional information is required and can see what's been requested, upload new documentation if needed. |

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| 12 | Application Approval | A designated administrative user/IFM staff member reviews applications for compliance with requirements. | Admin user can approve or deny application. Can select reason for denial. |
| 13 | Exam scheduling | Approved applications are eligible for exam scheduling. Eligibility is valid for X time period (TBD). | SSO integration with test delivery provider (currently Prometric) to schedule either test center or online proctored exam via Prometric scheduling system. Exam appointment details are available in the CMS, e.g. appointment status (scheduled, cancelled), exam date, time, location. |
| 14 | Exam delivery | Windows-based testing, twice per year. Typical annual examinee volume is 300-350. | Exam result reflected in CMS, e.g. Pass, Fail, Incomplete, No-show |
| 15 | Score report | Examinee can access their official score report online. | Examinee receives notice that score report is available. Can review/download/print official score report. |
| 16 | Credential Issue | Issuing an active credential for those who pass exam. | Unique credential ID generated. Credential valid for 6 years. |
| 17 | Digital badge | IFM does not currently offer digital badging but plans to for the new program. | Integration with digital badging provider to issue badge. |
| 18 | Entering Professional Development Hours (PDH) | After certification granted, applicant can choose to enter Professional Development Hours (PDH) as they occur. | Enter name of provider(s), date(s) of activity/event, total PDH earned. Upload documentation. *Opportunity to integrate with IFM's LMS to auto-populate completed IFM courses, programs, conferences, etc. |
| 19 | Credential Maintenance | Licensure requirement | Every 2 years, certificant must reaffirm ongoing active healthcare license. |
| 20 | Renewal fee | Candidate pays required renewal application fee before starting the application. | Payment is required to begin renewal application. Integration with IFM website to process application payment via Product page. |

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| 21 | Professional Development Hours | The PDH that candidate has previously entered (if any) are viewable as part of the renewal application. | Candidate can review PDH already entered and/or enter additional PDH to meet minimum requirement (minimum hours in 6-year credential lifecycle). |
| 22 | Renewal application submission | Applicant can save progress and return to application until complete. | Renewal application can only be submitted once all requirements are met and required information is provided. |
| 23 | Renewal Application review/audit | IFM does not currently have a renewal application review process. | Either all submitted renewal applications OR only applications selected for audit are in queue for review. Applications not selected for audit are auto-approved. |
| 24 | Renewal Application Approval | A designated administrative user/IFM staff member reviews renewal applications for compliance with requirements. | Admin user can approve or deny renewal application. Can select reason for denial. |
| 25 | Credential renewal | Upon approval of renewal application, credential is valid for another 6-year cycle. | Unique credential ID remains the same. New expiration date is generated. System captures date the credential was last renewed. |
| 26 | Credential lapse | If a certificant does not renew by the credential expiration date, the credential will no longer be active and will move automatically to Lapsed. | Credential status is Lapsed for one year from expiration date. Renewal application remains available. Late fee assessed. |
| 27 | Credential expires | If a certificant does not renew by the final year of Lapsed date, the credential will no longer be active and will move automatically to Expired. | Credential status is expired. Renewal application no longer available. |
| 28 | Email automations | Admin users can configure auto-generated candidate email notifications (e.g. application submitted, application approved, schedule your exam, exam results are available, renewal reminders) | Candidate receives auto-generated emails at designated steps in workflow. |
| 29 | Candidate Dashboard | Candidate has access to a dashboard that shows them key information about application and | Dashboard offers information such as initial application status/progress, exam |

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| | | certification status, actions required. | appointment status, credential status, credential renewal date, renewal application status/progress |
| 30 | System Training | IFM’s system administrators understand the features and functionality of the CMS. | CMS provider delivers training to appropriate staff on how to use the system and provides ongoing support for use and maintenance. |

Not in scope:

- Association or membership management
- Recommendations for 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:

- **Project Approach:** Describe your proposed approach to fulfilling the project objectives and recommended methodologies or strategies.
- **Ability to provide the Scope of Work.** Provide affirmation that you and your team are able to deliver the scope of work.
- **Budget Breakdown:** Provide a comprehensive breakdown of the costs associated with each deliverable and task, clearly indicating how the budget will be utilized.
- **Qualifications and Experience:** Highlight your organization's relevant qualifications, expertise, and past experience in delivering similar projects.
- **Optional Aspects:** If your proposal includes any optional elements beyond the specified scope, clearly outline the additional costs associated with each optional aspect.
- **Timeline:** Present a detailed project timeline, including milestones, key deliverable target dates, and the project's estimated duration.
- **Change Management:** IFM understands that business requirements may change during the development of the CMS that could affect project size, scope, and cost. IFM requests that bidders include information in their proposals about change management processes.
- **References:** Include references from previous clients or projects to demonstrate the successful execution of similar initiatives.



BUDGET

IFM has allocated a budget of up to \$300,000 for this project.

RFP TIMELINE

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| Request for Proposals issued to prospective vendors | Nov 8 |
| Question period from prospective vendors (IFM to respond within three business days) | Nov 11 – 22, 2024 |
| Proposals due to IFM | Dec 4, 2024 |
| Review of proposals by IFM | Dec 5-13, 2024 |
| Communicating with vendors | Dec 16, 2024 – Jan 3, 2025 |
| Presentations/interviews by selected finalists | Jan 6-15, 2025 |
| Final selection (tentative*) | Jan 17, 2025 |
| Contract to be drafted | Jan 21-31, 2025 |
| Contract signed by both parties (tentative*) | Feb 21, 2025 |
| Project to be completed during: | Feb – Nov, 2025 |

*Tentative timeframes are subject to change. IFM will inform responding vendors of any revisions.

PROPOSAL EXPECTATIONS

Proposals should demonstrate:

- Expertise conducting similar projects that focus on a new build of a CMS.
- A willingness and ability to quickly learn about the organization, functional medicine, and the ecosystem.
- Experience working with organizations that certify practitioners; non-profit healthcare organizations preferred.

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.



- **Budget:** How closely does the proposed budget and cost breakdown align with IFM’s financial goals.
- **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.

IFM seeks partners who share in IFM’s [DEIB commitment](#). IFM has undertaken the responsibility to ensure we are honoring our commitment to DEIB in our internal business practices. Preference will be made to vendors who exhibit a shared commitment to these principles.

Vendor Interviews

Promising vendor partners will be invited to interview via video conference to further discuss the scope of work between January 6-15, 2025.

CONTRACT TERMS AND CONDITIONS

To be discussed upon selection of consultant.

PROJECT TIMELINE

Project to commence: February 2025

Project to complete: November 2025

SUBMISSION GUIDELINES

- Proposals must be submitted as a PDF via email to Liz Grater, Director of Credentialing, at elizabethgrater@ifm.org by **Wednesday, December 4, 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 Liz Grater at elizabethgrater@ifm.org. Expect a response within three business days.