

How to Write a Request for Proposal (RFP) for Medical School Curriculum Management Software

A Strategic Guide for AAMC-Accredited Institutions Selecting UME Platforms

Table of Contents

01	Executive Summary
02	Introduction
03	Why a Strong RFP Is Essential for Selecting Medical School Curriculum Software
04	Define the Vision Before Writing the RFP
05	Define What Success Looks Like
06	Engage the Right Stakeholders Early
07	Structuring Your RFP
10	Functional Requirements for Medical School Curriculum Platforms
13	Technical Requirements for Curriculum Management Platforms
14	Implementation and Support for Curriculum Management Platforms
15	Implementation Lifecycle
17	Vendor Submission Checklist and Instructions
18	Submission Instructions Callout
19	Evaluation Criteria and Scoring Guidance
21	Summary and Next Steps
22	Appendix A: Evaluation Scoring Worksheet
23	RFP Template

Executive Summary

For AAMC-accredited medical schools, software selection is not a simple technical decision. The platforms that manage curriculum, evaluations, and clinical scheduling directly influence accreditation compliance, student progression, and institutional effectiveness. A well-structured Request for Proposal (RFP) creates the foundation for selecting a system that meets these complex needs.

This guide equips medical schools to design RFPs that reflect their institutional priorities and operational needs. It explains how to define project scope, organize RFP content, and structure evaluation criteria to drive valid vendor comparisons. It also identifies common pitfalls that create misalignment or hinder implementation.

The insights in this paper are grounded in real RFPs issued by U.S. medical schools, AAMC-aligned standards, and practical lessons from successful software procurements. The content includes sample requirement language, evaluation frameworks, and best practices for gathering stakeholder input. A companion RFP template and evaluation rubric are also included.

Schools preparing for platform transitions, accreditation cycles, or curriculum redesigns can use this guide to drive an effective and focused procurement process.

Introduction

Undergraduate medical education (UME) programs face growing pressure to modernize their systems for managing curriculum, evaluations, clinical rotations, and accreditation data. As program structures evolve and the expectations of the Liaison Committee on Medical Education (LCME) grow more complex, medical schools increasingly rely on purpose-built platforms to coordinate academic operations and ensure compliance. Choosing the right system requires more than technical vetting. It begins with a well-defined RFP.

This guide supports AAMC-accredited institutions in writing RFPs that reflect the realities of modern medical education. It focuses on curriculum and learner management platforms designed for UME and outlines how to structure an RFP that surfaces meaningful vendor differentiation, avoids downstream friction, and aligns with both strategic goals and operational requirements.

While some schools rely on central IT or procurement teams to manage RFPs, UME-specific input remains critical. The following content is intended for curriculum leaders, MedEd administrators, IT staff, and decision-making committees involved in evaluating and selecting these platforms. It reflects institutional best practices and direct analysis of RFPs issued by U.S. medical schools over the past several years.

The following sections provide a structured approach to RFP development, beginning with the strategic role a well-written RFP can play in aligning internal stakeholders and setting up a successful platform selection process.



Why a Strong RFP Is Essential for Selecting Medical School Curriculum Software

An RFP sets more than procurement in motion. It frames the entire platform selection process for medical schools navigating accreditation cycles, curricular reforms, or system modernization. A strong RFP defines what the institution needs, how it will measure fit, and what success should look like beyond feature checklists.

Generic education RFPs often fall short in medical education. They rarely reflect the layered structure of UME programs, which span pre-clinical and clinical phases, integrate diverse stakeholder roles, and require alignment with LCME standards. When those complexities are glossed over, vendor responses tend to follow suit. The result is a surface-level comparison that conceals critical gaps until implementation, when course corrections become costly.

Generic RFP	Purpose-Built RFP for UME
Recycles standard LMS requirements	Aligns with pre-clinical, clinical, and LCME reporting
Emphasizes features	Prioritizes workflows, support, and integration
Yields templated vendor responses	Produces tailored answers that reflect real use cases
Treats vendors as interchangeable	Surfaces meaningful differences in strategy and service

A purpose-built RFP mitigates risk by **asking the right questions, filtering for functional relevance, and creating space for vendors to demonstrate how their platform supports your workflows and compliance requirements.** It also accelerates internal decision-making by building clarity among curriculum leaders, IT staff, and procurement teams.

A strong RFP shapes vendor behavior. It signals that your institution has taken the time to define priorities, map operational needs, and think critically about integration and long-term support. That structure leads to more transparent, solution-focused proposals and sets a standard for meaningful partnership.

A generic RFP treats curriculum software as interchangeable.

A purpose-built RFP turns it into an institutional advantage.

Curriculum platforms influence everything from student feedback loops to LCME documentation audits. A well-crafted RFP gives your institution the control to make a confident and lasting platform decision.

Define the Vision Before Writing the RFP

Clarify what your institution needs from a new platform—and why—before you begin writing requirements or formatting the RFP. This step prevents RFPs from becoming bloated with legacy wish lists, vague technical jargon, or features that solve yesterday's problems.

Start by identifying the **strategic drivers behind the project**. These may include:



Preparing for an upcoming LCME site visit



Replacing a fragmented or outdated system



Improving coordination across campuses or departments



Reducing manual effort related to evaluations or scheduling



Supporting new curricular models or distributed learning structures



Define What Success Looks Like

Success might include **higher evaluation completion rates, faster curriculum mapping workflows, real-time analytics for the curriculum committee, or easier generation of LCME compliance documentation.** These outcomes should be practical, measurable, and tied to broader institutional goals, not just technical functionality.

To focus the project and align internal stakeholders, use a structured checklist to translate strategic intent into practical requirements.

Vision-to-Requirements Checklist

Use this list to clarify goals before drafting your RFP:

- ☐ What's driving this procurement (e.g., LCME readiness, workflow gaps, system obsolescence)?
- ☐ What outcomes define success for faculty, staff, and students?
- ☐ Which workflows must the new platform support today and in 3 years?
- ☐ Who are the primary users, and what pain points are you solving for them?
- ☐ What systems must the platform integrate with (SIS, LMS, evaluation tools)?
- ☐ What constraints exist around timeline, budget, or data migration?



Engage the Right Stakeholders Early

Once your strategic intent is clear, identify the teams and individuals who will interact with the system. Their insight will shape not only what the RFP includes but also how the platform performs once implemented.

Stakeholders typically include:

- Faculty and course directors managing content and assessments
- Clerkship coordinators assigning students to rotation sites
- Students accessing schedules, evaluations, and portfolio artifacts
- Administrators tracking compliance and reporting to the LCME or AAMC
- IT staff supporting integration, authentication, and data migration

Engaging these groups early reduces the risk of misalignment. Stakeholder interviews, short surveys, or cross-functional planning sessions can uncover unspoken constraints, terminology mismatches, or integration needs that shape RFP language and vendor scoring criteria.

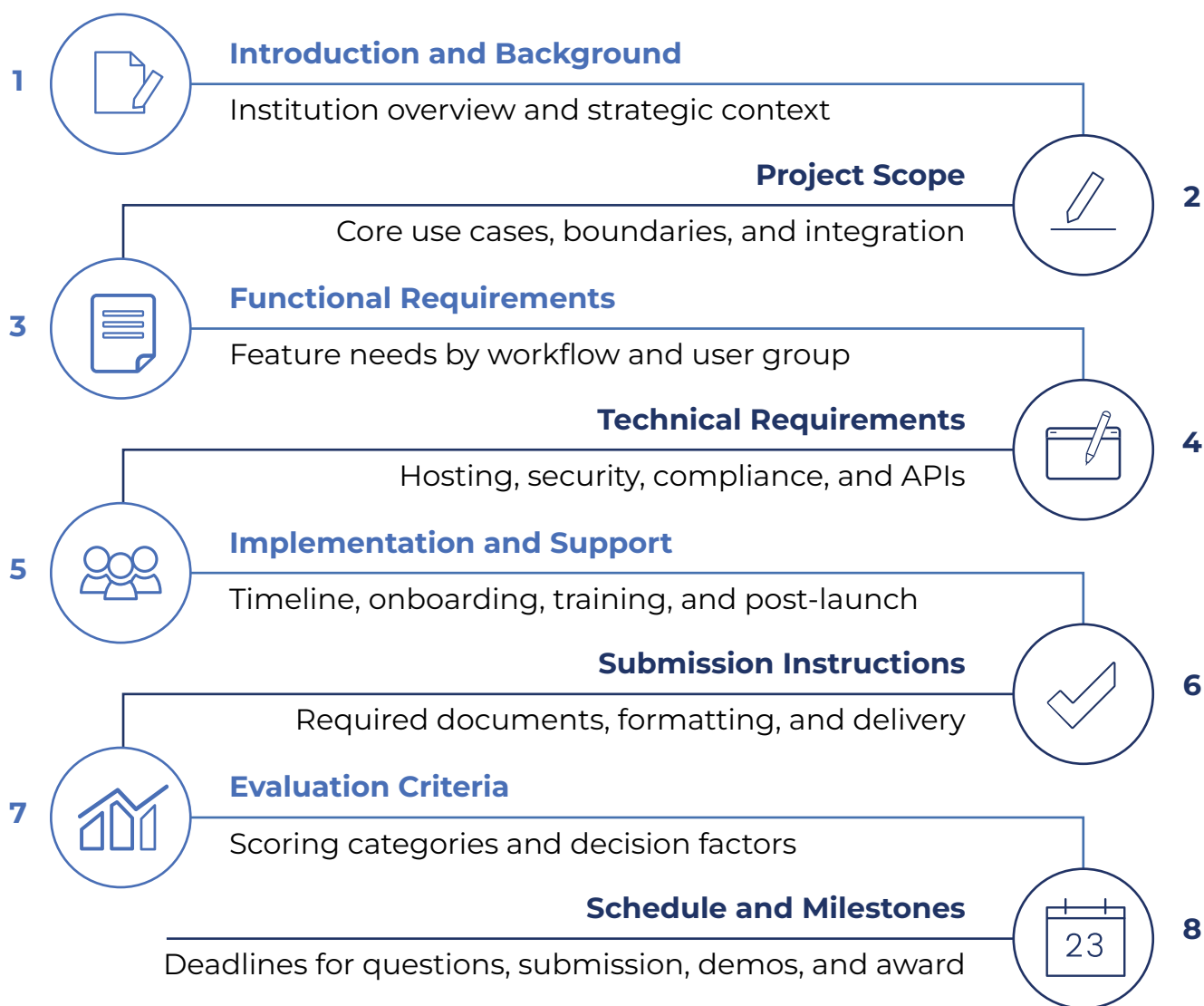
The more clearly your team defines success, the easier it becomes to spot the right fit.

A strong RFP starts with clarity. The more grounded your requirements are in real-world goals and workflows, the more focused and relevant vendor responses will become.

Structuring Your RFP

A well-structured RFP creates clarity for your internal stakeholders and the vendors you invite to respond. It reduces the risk of vague proposals, misaligned expectations, and downstream implementation issues. Each section of the RFP should serve a specific purpose: to communicate intent, request critical information, and create a level playing field for evaluation.

Below is a recommended structure tailored to the needs of UME programs evaluating curriculum and learner management platforms.





Introduction and Background

Start with a summary of your institution, the program's scale, and the reason for issuing the RFP. If applicable, mention any accreditation timelines, curriculum reform initiatives, or technology modernization efforts that make this procurement strategically important.

Project Scope

Define what the RFP covers and what it does not. Be specific about whether the platform will be used for curriculum mapping, evaluations, clinical scheduling, student portfolios, or all of the above. Clarify any required integrations, multi-campus considerations, or data migration expectations.

Functional Requirements

Organize these into logical categories such as curriculum management, evaluation workflows, scheduling, and student-facing features. Avoid generic lists. Focus on core use cases, accreditation support, and mission-critical functionality. Use checklists or response matrices if needed to encourage direct answers.

Technical Requirements

Specify expectations around hosting (cloud vs. on-premises), data residency, single sign-on, API access, browser compatibility, accessibility compliance (e.g., WCAG), and system uptime. Ask vendors to disclose third-party dependencies, update frequency, and certifications (SOC 2, FERPA, HIPAA-adjacent standards, etc.).



Implementation and Support

Request a high-level implementation plan with estimated timeline, key milestones, and resource expectations. Ask for information about onboarding, training, and post-launch support models. Make sure vendors address both administrative and end-user readiness.

Proposal Submission Instructions

List what vendors should submit and in what format. Common elements include a cover letter, narrative responses, product architecture, implementation plan, client references, pricing structure, and optional addenda such as a completed HECVAT or data security questionnaire.

Evaluation Criteria

Share the categories your team will use to evaluate proposals. Include both quantitative and qualitative dimensions. Standard criteria include functional fit, usability, implementation strategy, integration readiness, vendor stability, support model, and total cost of ownership.

Schedule and Milestones

Publish your RFP timeline: release date, deadline for vendor questions, response deadline, demo dates, finalist selection window, and anticipated contract start. Transparency here improves vendor participation and reduces unnecessary back-and-forth.

*The structure of your RFP shapes the quality of the proposals you receive.
A clear, targeted format invites better answers.*



Functional Requirements for Medical School Curriculum Platforms

Functional requirements define the platform's ability to support your workflows, users, and institutional goals. In the context of medical education, they should address accreditation readiness, process automation, and ease of use for faculty, staff, and students.

Organize requirements around how users interact with the platform rather than listing generic checkboxes. The best RFPs group functions by purpose—curriculum mapping, evaluations, scheduling, and reporting—so vendors can respond clearly and specifically.

Curriculum Management

Request tools that support mapping learning objectives to sessions, courses, and program outcomes. Include support for **hierarchical tagging, versioning**, and alignment with national **competency frameworks**. Specify the need to generate and submit **AAMC Curriculum Inventory (CI)** exports.

Key considerations:

- Session-to-program objective mapping
- Competency tagging and curriculum search
- Version history and audit logs
- Support for LCME and AAMC CI requirements

Evaluation and Feedback

Your platform should manage a range of evaluation workflows, including student evaluations of courses and faculty, faculty evaluations of students, and feedback loops for clinical settings. Look for features that support **automated distribution, anonymity, flexible timing, and linked competencies**.

Key considerations

- Multi-source evaluations (students, faculty, preceptors)
- Anonymous responses with customizable forms
- Time-released distribution and reminders
- Integration with competency tracking or MSPE data

Scheduling and Clinical Rotations

Include tools for managing both pre-clinical course schedules and clinical rotation assignments. If your school uses block or lottery-based systems, note that explicitly. The system should support site capacity limits, conflict detection, and multi-campus scheduling.

Key considerations:

- Course, rotation, and exam scheduling tools
- Clinical site management and capacity tracking
- Rotation lottery or optimization tools
- Attendance logging and adjustment workflows

Functional Area	What to Emphasize in the RFP
Curriculum Management	Objective mapping, versioning, AAMC CI alignment
Evaluation & Feedback	Multi-source workflows, anonymity, reminders, MSPE linkage
Scheduling	Course/rotation tools, site capacity, lottery, or block features
Student Experience	Portals, portfolios, MSPE, task tracking
Reporting & Compliance	Dashboards, curriculum heatmaps, accreditation exports

Student Experience and Portfolios

Request a student-facing portal that provides access to schedules, evaluations, tasks, and longitudinal performance data. If your institution includes portfolios or MSPE tracking, vendors should demonstrate how the platform supports those workflows.

Key considerations:

- Self-service portal with calendar, documents, and alerts
- Portfolio tools tied to performance data
- MSPE data compilation and review workflows
- Role-based dashboards (student, faculty, coordinator)

Reporting and Accreditation Readiness

Ask for built-in and customizable reporting tools that allow faculty and administrators to track **curriculum coverage, evaluation participation, and accreditation metrics**. Reporting tools should support internal dashboards as well as downloadable reports.

Key considerations:

- Curriculum heatmaps or matrix views
- Evaluation completion dashboards
- AAMC CI mapping visualizations
- Exportable reports for committees and site visits





Technical Requirements for Curriculum Management Platforms

Strong functional performance depends on equally strong technical infrastructure. Your RFP should clearly outline the platform’s expected technical characteristics to ensure compatibility, security, and long-term maintainability within your institutional environment.

Focus this section on how the platform will be deployed, accessed, integrated, and supported. The goal is to create clear boundaries for what your IT, compliance, and governance teams will accept, without overwhelming vendors with unnecessary detail.

Hosting and Deployment

Specify your preferred hosting model, such as **cloud-hosted SaaS** or **on-premises deployment**, and whether data must reside within the United States. Clarify expectations for **uptime, redundancy, and disaster recovery protocols**.

Area	RFP Focus
Hosting & Deployment	Cloud vs. on-prem, U.S. data residency, uptime SLAs, disaster recovery
Authentication & Access	SSO compatibility, role-based permissions, and access logging
Integrations	API documentation, SIS/LMS sync, supported vendors (e.g., MedHub, ExamSoft)
Security & Compliance	FERPA, SOC 2, encryption standards, breach protocols
Accessibility & Devices	WCAG 2.1 compliance, browser support, mobile readiness, VPAT availability

Integration Expectations

Vendors should detail how their platform integrates with your student information system (SIS), learning management system (LMS), and any existing evaluation or scheduling tools. Ask for links to developer documentation or sandbox environments where applicable.

Data Security and Privacy

Ensure the platform meets baseline data protection and privacy standards, such as FERPA, SOC 2, and encryption at rest and in transit. Request vendor documentation and ask whether third-party subcontractors are used for infrastructure or analytics.

Clear technical boundaries reduce IT friction during evaluation and speed up implementation after selection.

Implementation and Support for Curriculum Management Platforms

Selecting a platform is only the beginning. A strong RFP should request detailed information about how the vendor will support **implementation, onboarding, training, and long-term customer success**. Many projects struggle not because of missing functionality, but because institutions and vendors enter implementation with different assumptions.

Use this section to set expectations and evaluate how well each vendor partners during the rollout phase and beyond.

Implementation Timeline and Rollout Planning

Ask for a sample implementation timeline with major milestones, such as project kickoff, system configuration, data migration, pilot testing, and go-live. Clarify whether your institution prefers a phased rollout or full implementation at once.

Key considerations:

- Go-live date and critical dependencies
- Discovery and planning period
- Configuration and stakeholder validation cycles
- Pilot groups and staged rollout options

Implementation Lifecycle



Training Plans and Stakeholder Readiness

Your platform will touch multiple user groups across departments. Require vendors to describe how they deliver training to administrative users, faculty, and students. Ask whether training is offered live, on-demand, or as part of an LMS. Clarify expectations for documentation, refreshers, and help center availability.

Key considerations:

- Training delivery format (live, recorded, written)
- Faculty training plans
- Admin onboarding and role-based instruction
- Help center, tutorials, and user guides

Post-Launch Support and Service Expectations

Post-launch support is where many vendor relationships falter. Ask for details on the vendor's support structure, including how users request help, expected response times, and service level agreements (SLAs). Consider asking for customer satisfaction scores or client retention metrics.

Key considerations:

- Support channels (chat, email, phone)
- Average response and resolution times
- Escalation process for high-impact issues
- Dedicated account manager or customer success contact

Vendor Relationship and Long-Term Engagement

Vendors should explain how they support client engagement after implementation, including how they handle ongoing account management, product planning transparency, and structured channels for feedback or feature input.

Key considerations:

- Client success touchpoints after go-live
- Feedback loops and roadmap input
- Support during accreditation prep or curriculum reform
- Experience with institutions of similar size or structure

Strong implementation and support plans help ensure your platform succeeds beyond the contract.



Vendor Submission Checklist and Instructions

Even the most thoughtfully written RFP can stall if vendors are unclear on what to submit or how to format their responses. This section outlines exactly what vendors must include, along with how and when to submit their materials.

Required Submission Components

Use the checklist below to guide proposal submissions. Include all items unless marked as optional in your response template.

Required Item	Purpose
Cover letter	Introduce your organization and summarize your interest
Executive summary	Provide a high-level overview of your proposed solution
Completed requirements matrix	Indicate where and how your platform meets the outlined needs
Narrative responses	Address key prompts outlined in the RFP
Implementation plan	Include a sample timeline, milestones, and project phases
Support model overview	Describe the post-launch support structure and SLAs
Company profile and team bios	Highlight relevant experience and organizational fit
Client references	List at least two AAMC-accredited institutions
Pricing proposal	Detail licensing, services, and optional modules
Security documentation	Submit any relevant compliance documents (HECVAT, VPAT, SOC 2)



Submission Instructions Callout

Title: Submission Instructions

Purpose: Highlight logistical details vendors need to submit their proposals correctly and on time.

Format:

Shaded box or outlined callout

Full-width within column or aligned right if using margin-based sidebars

Maintain horizontal padding and vertical spacing to distinguish from body text

Submission Instructions

Submit to: [Insert email address, procurement portal, or system link]

Deadline: [Insert date] by [Insert time and time zone]

File format: PDF or DOCX preferred

Q&A deadline: [Insert date] (responses will be shared via [method])

Contact for questions: [Insert name, title, and email address]

Clear expectations and structured formatting help vendors submit stronger, more focused proposals.



Evaluation Criteria and Scoring Guidance

Publishing your evaluation criteria helps vendors tailor their responses and ensures internal stakeholders are aligned on what matters most. A structured evaluation framework also accelerates review, minimizes subjectivity, and reduces the risk of overlooking critical gaps.

This section should include **qualitative and quantitative evaluation categories**, clearly describing how proposals will be compared.

Core Evaluation Categories

Include weighted or prioritized categories that reflect technical fit and long-term strategic alignment. Common categories for UME platform selection include:

Category	What to Evaluate
Functional fit	How well the platform supports workflows across the curriculum, evaluations, scheduling, and reporting
Usability	Clarity, simplicity, and efficiency of the user experience for students, faculty, and admins
Implementation approach	Realism and clarity of the proposed rollout, training, and onboarding plan
Integration readiness	Ability to connect with SIS, LMS, SSO, and third-party tools
Support model	Post-launch support structure, SLAs, and customer success alignment
Vendor experience	History working with medical schools or complex academic programs
Total cost of ownership	Licensing, services, training, add-ons, and long-term scalability

Scoring Rubric or Evaluation Matrix

Consider using a structured worksheet if your review process includes a scoring system. A rubric helps standardize evaluation across reviewers and reduces ambiguity when comparing vendors. A fillable Evaluation Scoring Worksheet is included in the appendix for internal committee use.

Category	Weight	Score (1–5)	Weighted Score
Functional fit	25%		
Usability	15%		
Implementation	15%		
Integration readiness	10%		
Support model	10%		
Vendor experience	10%		
Cost	15%		



Summary and Next Steps

Selecting a curriculum management platform for an undergraduate medical education program is a high-impact decision. The right system supports daily academic operations and long-term accreditation, institutional reporting, and learner experience. A well-written RFP gives your team the structure, clarity, and confidence to evaluate vendors effectively and select a platform built for your needs.

This guide outlined how to:

- Align stakeholders and define success before drafting your RFP.
- Structure each section of the RFP for clarity and completeness.
- Translate real workflows into functional and technical requirements.
- Set expectations for implementation, support, and long-term engagement.
- Provide vendors with clear submission instructions and evaluation criteria.

To support your process, we've included two downloadable tools:

- A customizable RFP Template you can adapt to your institution
- A Scoring Worksheet designed to streamline vendor evaluation

With those tools in hand, your team can move forward with a procurement process reflecting modern medical education's complexity and strategic importance.

Appendix A: Evaluation Scoring Worksheet

Use this worksheet to score vendor proposals across key evaluation categories. Each reviewer should assign a score from 1 (poor fit) to 5 (excellent fit), then multiply by the assigned weight to calculate a weighted score. Use the “Comments” column to capture rationale or concerns.

Category	Weight	Score (1–5)	Weighted Score
Functional fit	25%		
Usability	15%		
Implementation	15%		
Integration readiness	10%		
Support model	10%		
Vendor experience	10%		
Cost	15%		

Instructions: Use whole numbers between 1 and 5 for each score. Weighted scores are calculated by multiplying the score by the weight. Review teams should align on scoring definitions in advance for consistency.

Ready to Write Your Own *RFP*?

Download Now:

Click here to download our
RFP Template in Word Format.

