Request for Information (RFI)

Accreditation Management Platform

Modernization of Accreditation Operations and Workflows

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RFI Contact

AAALAC International

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All vendor questions and responses should be directed to the designated contact in accordance with the RFI instructions.

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1. Organizational Background

AAALAC International improves the welfare of animals in science and education through the accreditation of organizations meeting high standards of humane and responsible animal care and use. AAALAC International is a private, nonprofit organization with more than 60 years of experience accrediting animal care and use programs worldwide.

The accreditation program currently supports approximately 1,200 accredited units in 52 countries, with annual net growth of approximately 2-5%. Operations are organized across three global regions: the Americas; Asia-Pacific; and Europe, Africa, and the Middle East.

The accreditation program is administered by approximately a dozen professional staff and relies heavily on a large international volunteer reviewer network of nearly 500 individuals, including members of the Council on Accreditation, Council Emeritus members, and Ad Hoc Visitors.

The organization is governed by a Board of Directors. The Council on Accreditation carries out the accreditation review and decision-making process under the Rules of Accreditation.

During the accreditation process, institutions submit information describing their animal care and use programs; peer reviewers evaluate that information and conduct site visits; accreditation decisions are made through Council review; and accredited programs remain subject to ongoing reporting and periodic reevaluation.

2. Project Background / Why Now

AAALAC International's accreditation program is currently supported through a combination of legacy systems, email, document exchange platforms, and manual processes. The organization's existing accreditation database maintains key accreditation and operational

information, while additional activities throughout the accreditation lifecycle are managed through separate tools and staff-driven workflows.

Over time, this environment has resulted in significant reliance on manual processes, including movement of information between systems, creation and maintenance of tracking tools, management of communications and deadlines, preparation and distribution of review materials, and monitoring of workflow status. Many processes also depend upon staff knowledge to coordinate handoffs, identify exceptions, and ensure cases progress appropriately through the accreditation lifecycle. In addition, portions of the current technology environment rely on aging, custom-developed systems that present increasing challenges for long-term maintenance and adaptability.

At the same time, AAALAC International's accreditation program continues to grow and operate across an increasingly complex global environment. The current operational model provides limited ability to automate routine activities, provide real-time visibility into accreditation workflow, efficiently support geographically dispersed institutional users and volunteer reviewers, or generate operational information needed to manage and improve the program.

AAALAC International recently adopted revised Rules of Accreditation and is undertaking a substantive redesign of its Program Description (PD), which has not been significantly updated since 2016. Rather than simply recreating the existing PD and associated processes into a new electronic format, AAALAC International views this work as an opportunity to modernize the operational infrastructure supporting the accreditation process.

The organization is therefore exploring a digital platform capable of serving as an "accreditation engine" supporting the accreditation lifecycle from initiation through review, site visit, institutional response, Council consideration, decision, follow-up, and triennial evaluation completion, while appropriately connecting with other organizational systems.

3. Project Vision — "Accreditation Engine"

AAALAC International seeks to implement a configurable digital platform that will serve as the operational "accreditation engine" for its accreditation program. The platform should support the accreditation lifecycle from application or periodic reevaluation through institutional submission, staff and peer review, site visit, institutional response, Council consideration, accreditation decision, follow-up, and evaluation completion.

The platform is intended to provide a centralized operational environment for accreditation workflow, institutional interaction, reviewer assignment and access, case management, communications, and operational reporting. It should reduce reliance on manual tracking, duplicate data entry, email-driven workflow, and staff-dependent handoffs while improving visibility, consistency, scalability, and the user experience.

The accreditation engine is not intended to replace all existing organizational systems. AAALAC International expects to continue using separate systems for long-term document retention, financial management, and other enterprise functions. Certain reviewer and volunteer information necessary to support accreditation activities is included within the primary scope. AAALAC International is also interested in exploring broader volunteer management capabilities as an optional scope, as described in Appendix D. The selected platform should support appropriate integration and data exchange with other organizational systems while maintaining a clear separation of responsibilities.

AAALAC International prefers solutions that maximize the use of existing, configurable functionality but is open to customization or custom development where appropriate to meet the organization's requirements. The organization seeks a solution in which authorized AAALAC business users can manage appropriate day-to-day business configuration while minimizing the need for internal technical administration and support. The desired division of responsibilities between AAALAC and the selected vendor will be informed by the capabilities and support models proposed by respondents.

The organization seeks a solution that can evolve as accreditation standards, workflows, forms, and operational needs change over time. AAALAC International is also interested in the responsible use of artificial intelligence and other emerging technologies where they may improve efficiency, consistency, data analysis, or the user experience, while maintaining appropriate human oversight, confidentiality, security, and data governance.

4. Project Scope

This RFI is intended to help AAALAC International understand available solution approaches, platform capabilities, implementation models, potential vendors, indicative costs, and areas requiring further requirements development. The requirements described herein represent AAALAC International's current understanding of its business needs and are provided to facilitate meaningful and comparable responses. They should not be interpreted as final specifications or as a request for a binding proposal. Information obtained through this RFI may be used to refine requirements and inform a subsequent procurement phase.

AAALAC International is seeking a configurable digital platform to support the operational management of its accreditation program. The primary scope includes the functionality necessary to manage accreditation cases, institutional interactions, reviewer assignments, accreditation review activities, Council consideration, decisions, follow-up, and ongoing oversight.

The primary scope should include capabilities in the following functional areas:

- **Accreditation lifecycle management** – initiation and tracking of new applications and periodic reevaluations; milestone and deadline management; workflow routing; status tracking; exception handling; follow-up; and triennial evaluation completion.
- **Institutional portal** – secure institutional access for submission of PDs and other required information, responses, supplemental materials, status information, and accreditation-related communications.
- **PD management** – configurable structured forms, attachments, versioning, conditional logic, carry-forward of appropriate information between accreditation cycles, review workflows, and support for revisions or supplemental submissions.
- **Reviewer assignment and accreditation expertise** – management of reviewer eligibility, expertise, availability, conflicts of interest, assignments, access to appropriate case materials, and accreditation-related service history.
- **Site visit and review support** – preparation for site visits, reviewer access to relevant materials, capture and management of review information, development of site visit findings or reports, and transition into post-visit review.
- **Council accreditation review** – assignment of cases for Council review, secure access to review materials, support for deliberative review, tracking of accreditation actions, and related workflows.
- **Accreditation correspondence and institutional response** – generation, review, approval, issuance, and tracking of accreditation-related correspondence, along with receipt and review of required institutional responses.
- **Ongoing accreditation oversight** – annual reports, reportable events, status changes, postponements, withdrawals, mergers, and other between-cycle accreditation activities.
- **Reporting and operational analytics** – dashboards, workload monitoring, cycle-time and deadline tracking, status reporting, configurable reporting, and export of operational data.
- **Security, access, and auditability** – role-based access, secure external-user participation, conflict-based restrictions, audit trails, authentication, and other appropriate safeguards for confidential accreditation information.

- **Workflow administration and configuration** – configurable workflows, business rules, forms, notifications, deadlines, and other operational elements necessary to allow the accreditation process to evolve over time.
- **Operational communications and notifications** – configurable communications, alerts, reminders, assignments, and deadline notifications supporting accreditation workflow and user engagement.

The selected platform should support appropriate integration and data exchange with AAALAC International's existing enterprise systems. Potential integration points include financial management, document retention and archival systems, authentication and identity management, email and calendar services, and other organizational platforms. Specific integration requirements will be further defined during the procurement process.

Certain reviewer and volunteer information required to support accreditation activities is included within the primary scope. AAALAC International is also interested in broader volunteer management capabilities as an optional scope, described separately in Appendix D. Vendors may propose an integrated module, related product, or appropriate integration approach for these functions.

4.1 In Scope

- Data integration architecture and services.
- Data migration from existing accreditation systems and related data stores.
- APIs and integration interfaces for upstream and downstream systems.
- Front-end web application and user experience.
- Administrative and operational interfaces.
- Authentication, authorization, role management, and audit logging.
- Workflow, forms, notifications, search, and document or content interactions where applicable.
- Reporting, dashboards, exports, and data access capabilities where applicable.
- Hosting, environments, deployment automation, monitoring, backup, disaster recovery, and support.
- Implementation, testing, training, cutover, stabilization, and knowledge transfer.

4.2 Vendor Should Identify

- Capabilities available out of the box.

- Capabilities requiring vendor configuration or professional services.
- Capabilities requiring custom development.
- Third-party products or subcontractors required.
- Known limitations or unsupported requirements.
- Recommended scope phasing and items that should be deferred.

5. Out of Scope

The primary scope does not include replacement of AAALAC International's enterprise financial management system, long-term document retention and archival environment, or broader governance and committee-management systems. The accreditation platform may exchange data with these systems where appropriate.

Broader volunteer management is not a required component of the primary scope. As described in Appendix D, AAALAC International is interested in exploring these functions as optional capabilities. Vendors should distinguish between volunteer/reviewer functionality necessary to support accreditation activities and broader volunteer-management functionality proposed as an optional solution.

6. Current Environment

6.1 Accreditation Systems and Tools

The following major systems and tools currently support accreditation operations:

- **ADaM** – current accreditation management interface supporting unit information, accreditation status/history, scheduling, reviewer information/assignments, and other operational data.
- **Private Site (document exchange tool)** – secure distribution of Program Descriptions (PDs), unit history, institutional responses, and other review materials.
- **SharePoint/AAALAC Document Repository (ADR)** – long-term document retention and archival repository.
- **Email/Microsoft 365** – communication, reminders, coordination, and workflow handoff.

- **Spreadsheets and staff-created trackers** – scheduling, late submissions, assignments, workflow monitoring, and other operational needs.
- **Sage** – financial management/accounting.

ADaM and the Private Site are user interfaces to AAALAC International's existing SQL-based accreditation data environment. This environment is currently hosted and supported by AAALAC International's current technology vendor. The following table summarizes key elements of the existing technical environment and their relevance to this RFI.

Area	Current-State Context	RFI Implication
Hosting	Microsoft Azure-hosted production environment	Vendor should explain supported deployment models, cloud architecture, and migration options.
Database	Microsoft SQL Server	Vendor should describe migration, coexistence, synchronization, and data conversion capabilities.
Application connectivity	ColdFusion DSN and application dependencies are documented	Vendor should identify how legacy application dependencies are retired, replaced, or bridged during transition.
Security	Segmented environments, role-based access, and security controls are part of the current operating model	Proposed solution must support strong identity, authorization, logging, and environment separation.
Operations	Monitoring, backup, recovery, validation, and vendor support are documented	Vendor should provide operational support model, observability, business continuity, and evidence capabilities.

The information above is a baseline, not a complete technical inventory. Respondents should describe their discovery methodology for validating current applications, data structures, integrations, business workflows, reports, user roles, security controls, and operational dependencies before final design and migration commitments are made.

6.2 Data Environment

AAALAC International has substantial historical structured and unstructured data that may need to be migrated, retained, integrated, or made accessible. Examples of information currently contained within existing systems include:

- Accredited unit master information
- PDs and other institutional submissions
- Contacts
- Accreditation status and history
- Site visit/review history
- Scheduled review cycles
- Reviewer profiles, expertise, qualifications, conflict of interest, and status

- Reviewer assignment and accreditation service history
- Species/program information
- Correspondence/history
- Historical accreditation records

6.3 Current Workflow

Accreditation activities currently occur across multiple systems and tools. Information may be entered or retrieved from ADaM, transmitted through email, uploaded to secure review environments, tracked through worksheets or spreadsheets, and ultimately filed in the organization's archival repository. Staff coordinate transitions between these systems and monitor completion of required activities. AAALAC International has mapped nearly 200 operational tasks as part of this project and is using this analysis to develop detailed functional requirements for the future platform.

6.4 Integration and Migration Considerations

AAALAC International anticipates that some current tools or functions will be replaced by the accreditation engine, while others will remain authoritative enterprise systems and exchange information with the new platform. The final integration and migration architecture will be informed by vendor capabilities and further requirements analysis.

AAALAC International does not assume that all historical data must be migrated into the new platform; appropriate approaches to migration, integration, archival access, or retention in existing systems may vary by data type.

7. High-Level Accreditation Lifecycle

AAALAC International accreditation is an ongoing process rather than a single application and decision event. Accredited programs undergo periodic comprehensive reevaluation and remain subject to reporting and other oversight between reviews. New applicants enter through a similar review process before joining the ongoing accreditation cycle.

Application / Cycle Initiation – New applicants enter the accreditation process through an application process. For accredited programs, periodic reevaluation cycles are initiated based on the program's established review schedule.

Institutional Submission – Institutions submit a PD and other information necessary to support accreditation review. Submission may involve multiple institutional participants and may require revisions, supplemental information, or staff follow-up.

Staff Review – Accreditation staff review submitted information for completeness and readiness and coordinate the activities necessary to prepare the case for peer review.

Reviewer Assignment & Preparation – Qualified peer reviewers are identified and assigned based on factors including role, expertise, availability, and conflicts of interest. Reviewers receive access to appropriate institutional and historical materials in preparation for the site visit.

Site Visit – Peer reviewers conduct the site visit and evaluate the institution's animal care and use program.

Post Site Visit Communication (PSVC) – Following the site visit, the institution has an opportunity to provide additional information or documentation addressing findings identified during the review. This information becomes part of the materials considered during subsequent accreditation review.

Post Site Visit Review – Site visit information is consolidated and reviewed, and materials necessary for Council consideration are prepared.

Council Review & Decision – The Council on Accreditation reviews the case and determines the accreditation action. If all identified concerns have been satisfactorily addressed, the Council may conclude the review with an accreditation decision requiring no further institutional action. If additional matters remain to be addressed, the Council decision identifies the required follow-up.

Institutional Response & Follow-Up – Depending on the accreditation action, an institution may be required to provide additional information or responses. These materials may undergo further staff and/or Council review before requirements are considered resolved.

Evaluation Completion – Accreditation status and associated records are updated following completion of required review activities. Designated records are transferred to the organization's archival environment in accordance with applicable records-management practices.

Ongoing Oversight – Between comprehensive reviews, accredited programs remain subject to annual reporting and other accreditation-related reporting and oversight. Changes or events may initiate additional review activities outside the normal periodic reevaluation cycle.

Although presented sequentially for purposes of the RFI, the accreditation lifecycle is not strictly linear (Figure 1). Cases may require additional information, reassignment, postponement, supplemental review, institutional response, escalation, or other exception

pathways. The future platform should support configurable workflow paths while maintaining visibility into case status, responsibility, deadlines, and history.

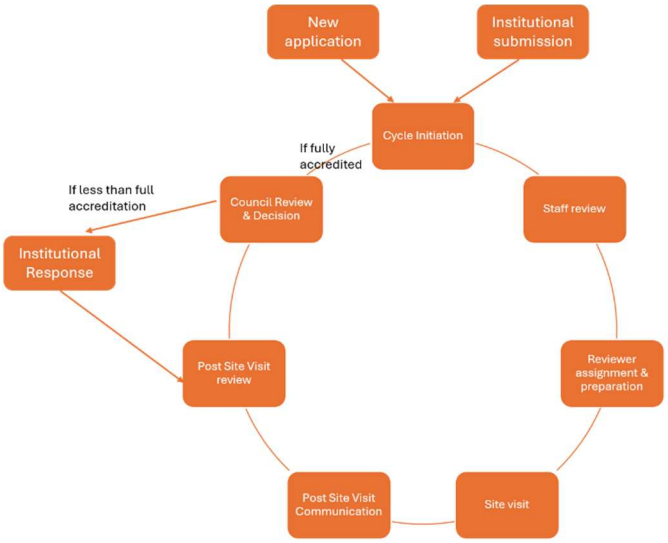


Figure 1: Schematic of lifecycle.

8. Functional Capability Requirements

The following requirements describe the core business capabilities needed to support AAALAC International's accreditation program. They are derived from analysis of current accreditation workflows and operational tasks and are intended to describe required business outcomes rather than prescribe a particular technical implementation. Cross-cutting requirements related to integration, user experience, workflow configuration, reporting, architecture, security, implementation, and support are addressed in subsequent sections.

Vendors should identify whether each capability is supported through standard functionality, configuration, customization, third-party components, or other means using the response scale described in Appendix B.

ID	Requirement
Accredited Unit and Accreditation Case Management	
FC-01	The platform shall maintain a persistent record for each applicant and accredited unit, including current information, accreditation status, relevant program characteristics, contacts, and longitudinal accreditation history.

ID	Requirement
FC-02	The platform shall support multiple accreditation cases, review cycles, and other accreditation activities associated with a unit over time while preserving the relationship to the persistent unit record.
FC-03	The platform shall create and manage accreditation review cycles, visit windows, statuses, milestones, responsibilities, and deadlines.
FC-04	The platform shall support normal and exception pathways, including postponement, withdrawal, merger, supplemental review, and other changes affecting an accreditation case or unit.
FC-05	The platform shall preserve the history of material changes to accreditation status, case status, unit information, and associated decisions.
Application and Cycle Initiation	
FC-06	The platform shall accept, acknowledge, and track new accreditation applications and associated applicant communications.
FC-07	The platform shall route new applications for designated staff and leadership review and decision.
FC-08	The platform shall create the institutional/unit record and capture core program information for reuse throughout the accreditation lifecycle.
FC-09	The platform shall identify upcoming periodic reviews and support initiation of review cycles, including generation of appropriate notifications and communications.
Program Description and Institutional Submission	
FC-10	The platform shall provide secure institutional submission, editing, versioning, and resubmission of Program Descriptions and associated materials.
FC-11	The platform shall support multiple authorized institutional participants with appropriate roles and permissions to prepare, review, certify, submit, and/or view institutional materials.
FC-12	The platform shall support supplemental or revised submissions without loss of prior versions or review history.
FC-13	The platform shall identify submission deadlines, provide configurable reminders, identify overdue submissions, and support escalation and exception follow-up.
FC-14	The platform shall assemble relevant case metadata and required review materials without duplicative manual file-building.

Staff Review and Case Preparation	
FC-15	The platform shall route Program Descriptions and other institutional submissions through configurable staff review stages, including completeness/readiness review, comments, requested revisions, status, and handoffs.
FC-16	The platform shall present relevant unit and accreditation history to authorized staff and reviewers within the active case.
FC-17	The platform shall support preparation and assembly of appropriate case materials for subsequent peer and Council review without requiring manual recombination of authoritative information.
Reviewer Identification, Assignment, and Preparation	
FC-18	The platform shall maintain reviewer information necessary to support accreditation activities, including role, status, qualifications, expertise, language capabilities, geography, availability, accreditation service history, and other defined assignment criteria.
FC-19	The platform shall support identification and assignment of reviewers using factors including reviewer role, expertise, workload, availability, eligibility, history, and conflict-of-interest information.
FC-20	The platform shall support multiple reviewer roles and team configurations appropriate to different types of accreditation review.
FC-21	The platform shall support reviewer invitation, acceptance/decline, reassignment, substitution, and modification of review teams while maintaining assignment history.
FC-22	The platform shall support defined conflict-of-interest declarations, unit-specific conflict checks, review and resolution of potential conflicts, authorized overrides where appropriate, and associated audit history.
FC-23	The platform shall provide assigned reviewers timely, role-appropriate access to current case information, institutional submissions, relevant accreditation history, and other materials required for review.
FC-24	The platform shall support authorized observer participation in site visits, including invitation, access, participation status, and feedback where applicable.
Site Visit Management	
FC-25	The platform shall support planning and coordination of site visits, including dates, team information, reviewer travel and itinerary information, institutional communications, confirmations, and relevant logistics.

FC-26	The platform shall provide reviewers appropriate access to information and tools needed to conduct and document the site visit.
FC-27	The platform shall support structured capture and management of site visit observations, findings, notes, and other review information, with appropriate controls over individual and shared reviewer content.
FC-28	The platform shall support collaboration among authorized review-team members and preparation of site visit information for subsequent review.
FC-29	Vendors should describe capabilities for mobile and/or offline access during site visits, including synchronization and protection of confidential information.
Post Site Visit Communication and Post-Visit Review	
FC-30	The platform shall support submission of a Post Site Visit Communication and associated documentation by the institution following the site visit.
FC-31	The platform shall associate Post Site Visit Communications with the applicable accreditation case and relevant findings or review information.
FC-32	The platform shall support staff and/or reviewer evaluation of Post Site Visit Communications before Council consideration.
FC-33	The platform shall support preparation, routing, review, and approval of post-site visit materials for Council consideration.
Council Review, Decision, and Correspondence	
FC-34	The platform shall support assignment of accreditation cases to appropriate Council reviewers using applicable role, workload, eligibility, and conflict of information.
FC-35	The platform shall provide authorized Council reviewers access to a complete, reviewer-ready accreditation case, including relevant institutional submissions, site visit information, Post Site Visit Communications, historical information, and supporting materials.
FC-36	The platform shall support recording and tracking of Council review, accreditation actions, decisions, required follow-up, and associated status changes.
FC-37	The platform shall support preparation, review, approval, issuance, and retention of official accreditation correspondence based on approved case information and decisions.
FC-38	The platform shall support accreditation decisions that require no further institutional action as well as decisions that initiate subsequent institutional-response and follow-up workflows.

Institutional Response, Follow-Up, Evaluation Completion, and Ongoing Oversight	
FC-39	When required by an accreditation decision, the platform shall request, receive, version, route, review, and track Post-Site Visit Communications, Institutional Responses, and supporting materials.
FC-40	The platform shall support additional or repeated follow-up and special-review workflows where matters are not resolved through the initial Post-Site Visit Communication.
FC-41	The platform shall support controlled closure of an accreditation case, including update of accreditation status and associated unit/case information
FC-42	The platform shall support annual reporting cycles, including cycle opening and closure, institutional submission, reminders, review, status, and exception tracking.
FC-43	The platform shall accept, triage, assign, and track reportable events and other accreditation-related submissions occurring outside the routine periodic review cycle.
FC-44	The platform shall maintain authorized institutional contacts and contact-change history.
FC-45	The platform shall support unit lifecycle changes, including withdrawal, merger, postponement, and other defined status changes, with appropriate approval, effective dates, history, and downstream actions.
FC-46	The platform shall support generation of verified accreditation-status correspondence from authoritative current unit information.

The requirements above represent AAALAC International's current understanding of core functional needs and are not intended to prescribe the detailed design of accreditation workflows. Respondents are encouraged to identify alternative approaches or standard platform capabilities that achieve the intended business outcomes more effectively.

9. Data Integration Requirements

AAALAC International anticipates that integration needs will vary by system and business purpose. The organization does not assume that all external systems require real-time or bidirectional integration. Appropriate approaches may include APIs, scheduled or event-driven exchange, standardized data exports/imports, secure file transfer, or other mechanisms. Vendors should recommend integration approaches proportionate to the applicable business need.

ID	Capability	Requirement / Question	Priority
DI-01	Integration architecture	Describe the proposed integration architecture, including APIs, event-driven integration, batch processing, ETL/ELT, middleware, or iPaaS components.	High
DI-02	API capabilities	Support secure, documented, versioned APIs for appropriate business and data services.	High
DI-03	Inbound/outbound data	Support inbound and outbound data exchange, including bidirectional integration where appropriate, using commonly adopted formats and protocols.	High
DI-04	Data transformation	Provide mapping, validation, transformation, normalization, and error-handling capabilities.	High
DI-05	Identity and matching	Describe support for entity matching, duplicate detection, master identifiers, and cross-system record reconciliation.	High
DI-06	Reference/master data	Explain how reference, lookup, and master data are governed and synchronized.	Medium
DI-07	Near-real-time integration	Describe near-real-time or event-driven options and practical latency expectations.	Medium
DI-08	Batch processing	Support scheduled bulk data exchange with controls for restart, reconciliation, and failure handling.	High
DI-09	File exchange	Support secure file-based exchange where APIs are unavailable, including validation and audit trail.	Medium
DI-10	Integration monitoring	Provide dashboards, logs, alerts, retries, dead-letter/error queues, and operational visibility.	High
DI-11	Data lineage	Describe lineage and traceability from source through transformation to target.	Medium
DI-12	Data quality	Support validation rules, completeness checks, exception management, and reconciliation reporting.	High
DI-13	Schema/version change	Explain how interface and schema changes are detected, versioned, tested, and deployed.	High
DI-14	Security	Support encryption, credential/secret management, least-privilege access, and auditable integration activity.	High
DI-15	Scalability	Describe transaction, volume, concurrency, and data-size limits, including scaling model.	Medium
DI-16	Developer enablement	Provide documentation, sandbox/test capabilities, sample payloads, and tools for integration development.	Medium

10. User Experience and Portal Requirements

The proposed solution should materially improve usability and maintainability while supporting different user roles and business processes. Vendors should explain the ongoing effort, service model, and expected turnaround required to maintain and modify the experience.

ID	Capability	Requirement / Question	Priority
FE-01	Responsive web experience	Provide a responsive experience across current desktop, tablet, and mobile browsers.	High
FE-02	Accessibility	Describe conformance with WCAG 2.2 AA or equivalent current accessibility practices, testing methods, and remediation process.	High
FE-03	Role-based experience	Support role-appropriate navigation, content, actions, and data visibility.	High
FE-04	Authentication	Support modern authentication and SSO patterns. Explain MFA options and identity-provider compatibility.	High
FE-05	User profile/account	Support secure profile, contact, preference, and account-management functions as appropriate.	High
FE-06	Forms and validation	Support forms, conditional logic, field validation, saved progress, and clear error handling. Describe which form elements and business rules can be configured by authorized AAALAC users and the process for changes requiring vendor support, including testing and deployment.	High
FE-07	Workflow status	Provide users with clear status, next steps, outstanding actions, and history for relevant processes.	High
FE-08	Search	Provide fast, relevant, permission-aware search across applicable records and content.	Medium
FE-09	Notifications	Support email and in-application notifications; describe SMS or other channel options. Describe how authorized AAALAC users can configure notification templates, triggers, recipients, and content, and identify changes requiring vendor support.	Medium
FE-10	Documents/files	Describe secure upload, download, preview, versioning, metadata, and file validation capabilities.	High
FE-11	Data tables and lists	Support filtering, sorting, pagination, export, saved views, and appropriate bulk actions.	High
FE-12	Dashboards	Support role-specific dashboards, alerts, and summary metrics. Describe capabilities for authorized AAALAC users to configure dashboards and views and identify changes requiring vendor support.	Medium
FE-13	Content administration	Describe capabilities for authorized AAALAC users to update labels, help text, instructions, content, and other appropriate page elements without vendor intervention. Identify content or interface changes requiring vendor support, including typical turnaround and any recurring or per-change fees.	Medium
FE-14	Internationalization	Describe support for localization, multiple languages, time zones, date formats, and regional formats.	Low/Med
FE-15	Browser/device support	State supported browser versions, device requirements, and end-of-support policies.	High
FE-16	Performance	Describe page-load, search, transaction, and concurrency performance objectives and monitoring.	High
FE-17	Design system	Describe reusable UI components, branding/theming, accessibility controls, and design-system governance.	Medium

FE-18	Operational administration	Provide secure interfaces for authorized AAALAC staff to perform necessary operational tasks such as user support, record management, business processing, and appropriate day-to-day business configuration. Describe the division of responsibility between AAALAC-managed business configuration and vendor-managed technical/platform administration.	High

10.1 User-Centered Design Approach

1. Describe your discovery and user-research approach, including how representative users and staff are involved.
2. Describe how user journeys, prototypes, usability testing, and accessibility testing are incorporated into delivery.
3. Provide examples of complex review, case-management, workflow, or portal experiences your team has simplified.
4. Describe how design decisions and reusable components are documented for long-term maintainability.
5. Explain how feedback and analytics are used after launch to improve the experience.

11. Workflow, Business Rules, and Change Management

AAALAC International seeks a platform that allows authorized business users to configure appropriate day-to-day workflows and business rules without routine vendor intervention. This may include statuses, assignments, deadlines, routing, notifications, escalation rules, and similar operational configuration. Technical administration and changes requiring software development or platform-level modification may remain vendor-managed. Respondents should clearly distinguish between business-user configurable capabilities and changes requiring vendor support.

ID	Requirement / Question
WF-01	Describe support for workflows, statuses, approvals, assignments, escalations, and exceptions, including which routine workflow elements can be configured by authorized AAALAC users and which require vendor support.
WF-02	Describe the tools and permissions available to authorized AAALAC users for routine workflow and business-rule configuration, including testing, approval, effective dating, and deployment. For changes requiring vendor support, describe typical turnaround, process, and pricing.
WF-03	Describe support for business rules, validation rules, effective dates, and rule versioning, including how authorized AAALAC users can configure and

	control appropriate rules and how changes requiring vendor support are managed.
WF-04	Describe audit history for workflow changes, user actions, approvals, and administrative changes.
WF-05	Describe support for configurable notification templates, triggers, reminders, and escalation logic, including which elements can be managed by authorized AAALAC users and the process for changes requiring vendor support.
WF-06	Describe support for queues, workload assignment, reassignment, and operational work management.
WF-07	Explain how workflow extensions or non-routine changes are estimated, developed, tested, deployed, documented, and supported.
WF-08	Describe the process for promoting approved technical or platform-level changes through non-production and production environments, including vendor responsibilities, rollback, testing, and release controls.

12. Reporting, Analytics, and Data Access

The proposed solution should provide authorized AAALAC users timely access to operational and management information without routine dependence on vendor-generated reports. Reporting capabilities should support day-to-day accreditation operations, workload management, program oversight, organizational decision-making, and appropriate exchange of information with other enterprise functions.

ID	Requirement / Question
RA-01	Describe standard reporting and dashboard capabilities available to business users.
RA-02	Describe ad hoc reporting, filtering, grouping, drill-down, export, and scheduled delivery options.
RA-03	Explain row-level or role-based security for reports and analytical data.
RA-04	Describe options for connecting enterprise BI tools or data platforms.
RA-05	Explain how authorized AAALAC users can directly access and extract raw or curated data for downstream analytics without routine vendor intervention, while maintaining appropriate security and governance.
RA-06	Describe audit reporting and operational metrics for integrations, workflow, usage, and system health.
RA-07	Describe data retention and historical reporting capabilities.
RA-08	Identify any limitations on data extraction, API access, report volumes, or export sizes.
RA-09	Describe the ability of authorized AAALAC business users to create, modify, save, share, and manage reports and dashboards without vendor intervention, including any licensing, training, or technical-skill requirements.
RA-10	Describe the ability of authorized AAALAC users to export complete or selected datasets on demand in commonly usable formats without vendor intervention. Identify any limitations on fields, record volumes, frequency, processing time, or associated fees.

13. Architecture, Hosting, and Technical Operations

ID	Area	Requirement / Question
AR-01	Deployment model	Describe SaaS, PaaS, vendor-hosted, or customer-cloud deployment options and your recommended model.
AR-02	Cloud architecture	Describe supported cloud providers, regions, environment topology, tenancy, network controls, and availability design.
AR-03	Environments	Describe development, test, staging/UAT, training, and production environment options and promotion controls.
AR-04	Availability	State standard availability SLA and architectural measures used to meet it.
AR-05	Scalability	Describe horizontal/vertical scaling, capacity management, performance testing, and peak-load handling.
AR-06	Observability	Describe application, integration, infrastructure, security, and user-experience monitoring and alerting.
AR-07	Logging	Describe centralized logs, retention, search, correlation, and customer access.
AR-08	Backup and recovery	Describe backup frequency, retention, restore testing, RPO, RTO, and recovery procedures.
AR-09	Release management	Describe release cadence, change notification, maintenance windows, rollback, and emergency fixes.
AR-10	Customization	Explain extension patterns and how customizations remain supportable through upgrades.
AR-11	Data Ownership and Portability	Explain how AAALAC International retains ownership and control of its data and can obtain complete or selected exports of its data without routine vendor intervention. Describe available export formats, metadata and document/file export, solution documentation, transition assistance, and measures to reduce vendor lock-in. Identify any limitations, fees, or vendor involvement associated with data extraction or transition, including how AAALAC-managed and vendor-managed configurations, workflows, and business rules can be documented and transferred if necessary.
AR-12	Technical documentation	Describe architecture, interface, deployment, operational, support, workflow, and business-rule documentation delivered to AAALAC.
AR-13	Third-party dependencies	Identify material third-party platforms, services, libraries, components, or infrastructure required by the proposed

		solution. Describe responsibility for licensing, maintenance, upgrades, security, support, and continuity of those dependencies.

14. Security, Privacy, and Compliance

Respondents should provide enough detail for security and privacy review, while clearly identifying items that require a nondisclosure agreement or later diligence phase.

ID	Requirement / Question
SEC-01	Describe your security governance program and applicable independent assurance, certification, or security framework(s), such as SOC 2 Type II, ISO/IEC 27001, ISO/IEC 27701, NIST Cybersecurity Framework, or comparable frameworks. Identify which are independently audited or certified and provide the current status and scope of each.
SEC-02	Describe encryption for data in transit and at rest, including key management.
SEC-03	Describe identity federation, SSO, MFA, RBAC, least privilege, privileged access, and account lifecycle controls.
SEC-04	Describe audit logging for user, administrator, integration, and security-relevant events.
SEC-05	Describe vulnerability management, patching, penetration testing, secure development, code scanning, and dependency management.
SEC-06	Describe incident detection, response, containment, customer notification, and post-incident reporting, including standard notification timelines, escalation procedures, and customer communication responsibilities.
SEC-07	Describe data isolation, tenant separation, network security, and production access controls.
SEC-08	Describe secure SDLC, change control, segregation of duties, and production deployment controls.
SEC-09	Describe privacy controls, retention, deletion, data subject support, and handling of sensitive information.
SEC-10	Identify data residency options, subprocessors, offshore access, and material third-party dependencies. Describe how subprocessors and third parties are selected, approved, monitored, and changed; what access they may have to AAALAC data; how AAALAC is notified of material changes; and what contractual and security requirements apply to them.
SEC-11	Describe backup protection, ransomware resilience, disaster recovery, and business continuity testing.
SEC-12	Describe customer security evidence available during due diligence, including reports, policies, diagrams, and test summaries.
SEC-13	Describe how the solution protects confidential accreditation information across institutional submission, staff review, external peer review, Council review, and archival transfer. Address granular case- and role-based access, time-limited access where appropriate, prevention of unauthorized cross-case access, document access controls, and revocation of access when an assignment or role ends.
SEC-14	Identify any artificial intelligence, machine learning, generative AI, automated decision-support, or similar capabilities included in or available through the proposed solution. Describe what AAALAC or institutional data may be accessed or processed by such capabilities; whether customer data is used to train or improve vendor or third-party models; applicable subprocessors; data-retention, security, and privacy controls; and AAALAC's ability to enable, disable, restrict, or separately approve AI-enabled functionality. Also indicate whether the proposed solution's architecture supports AI agents or autonomous or

	semi-autonomous workflows. If so, describe the human-approval controls, agent permissions and access restrictions, audit logging, and controls that limit the data, systems, tools, transactions, or actions an agent may access, initiate, modify, approve, or complete.
SEC-15	Describe how the proposed solution and associated services support compliance with applicable privacy and data-protection laws and regulations, including the EU General Data Protection Regulation (GDPR), where applicable, and other relevant national, regional, or state requirements. Describe capabilities and practices related to data-subject rights, data retention and deletion, data processing and subprocessors, and cross-border data transfers.
SEC-16	Identify what vendor business insurance policies and limits would be maintained throughout the term of the partnership with AAALAC (both vendor and its subcontractors).

15. Implementation, Data Migration, and Transition

Vendors should propose a practical delivery model for implementation and transition while minimizing business disruption and implementation risk. Responses should identify where phased delivery is beneficial and where a single cutover is required.

ID	Requirement / Question
DM-01	Describe your methodology for profiling SQL data before migration, including data quality and completeness assessment.
DM-02	Describe how legacy data structures are mapped to the target solution and how transformation rules are documented and approved.
DM-03	Explain how duplicate, invalid, orphaned, incomplete, and historical records are handled.
DM-04	Describe trial conversion, reconciliation, validation, exception management, and formal sign-off processes.
DM-05	Explain support for multiple mock migrations and delta migrations before cutover.
DM-06	Describe how attachments, documents, notes, audit data, and historical status information are migrated, if applicable.
DM-07	Explain how legacy identifiers are preserved or cross-referenced after migration.
DM-08	Describe rollback, recovery, and contingency options for migration and production cutover.
DM-09	Provide recommended data retention, archival, and read-only legacy access strategies.
DM-10	Identify customer and vendor responsibilities for extraction, cleansing, mapping, validation, and acceptance.

ID	Requirement / Question
IM-01	Provide a proposed implementation methodology and major phases from discovery through stabilization.
IM-02	Provide an indicative timeline with major milestones, decision points, dependencies, and critical-path items.
IM-03	Describe governance structure, project roles, meeting cadence, decision process, and escalation model.

IM-04	Identify vendor, AAALAC, and third-party staffing assumptions by role and approximate level of effort.
IM-05	Describe requirements validation, solution design, prototyping, configuration and/or development, testing, and acceptance practices.
IM-06	Describe data migration planning, mock conversions, reconciliation, final cutover, and fallback approach.
IM-07	Describe integration design, test environments, interface certification, and end-to-end testing.
IM-08	Describe performance, accessibility, security, and disaster-recovery testing before production launch.
IM-09	Describe training for end users, business process owners, authorized business configuration administrators, technical contacts, and support personnel. Distinguish training needed for routine business configuration from technical or platform administration.
IM-10	Describe change-management support, communications, documentation, and adoption activities.
IM-11	Describe post-go-live hypercare, defect handling, stabilization criteria, and transition to steady-state support.
IM-12	Identify the top implementation risks you anticipate for a legacy-platform modernization and transition of this type and recommend mitigations.
IM-13	Describe the recommended approach to transition from AAALAC's existing accreditation systems to the proposed solution, including whether phased implementation, parallel operation, temporary coexistence, or a single cutover is recommended. Identify any temporary data exchange, synchronization, read-only access, or other transitional capabilities that would be required and how data consistency would be maintained during the transition.

16. Support and Service Management

ID	Requirement / Question
SUP-01	Describe standard support hours, channels, severity definitions, response and resolution targets, and escalation processes for production incidents, user support, and routine service/configuration requests.
SUP-02	Describe 24x7 support options for critical production incidents.
SUP-03	Describe customer success, technical account management, escalation, and service-review processes.
SUP-04	Describe maintenance, patching, upgrades, release notes, and customer notification practices.
SUP-05	Describe service availability commitments and service-credit structure, if applicable.
SUP-06	Describe problem management, root-cause analysis, and corrective-action reporting.

SUP-07	Explain responsibility and support boundaries when issues involve third-party integrations, infrastructure, services, or other dependencies included in or required by the proposed solution, including how incidents are coordinated and resolved across vendors.
SUP-08	Describe support for customizations, extensions, APIs, and customer-developed integrations.
SUP-09	Provide standard data backup, restore, disaster recovery, and business continuity support commitments.
SUP-10	Describe end-of-life and deprecation policies for platform features and APIs.
SUP-11	Describe support available to authorized AAALAC business administrators for configuration, workflow, forms, business rules, notifications, reports, and other customer-manageable functions. Identify support included in standard fees versus separately billable services and typical response/turnaround times.

17. Vendor Qualifications & Relevant Experience

1. Provide a company overview, ownership structure, years in business, and principal office locations.
2. Describe experience modernizing or transitioning from legacy custom platforms to integrated modern solutions.
3. Provide three relevant customer examples of comparable complexity, including industry, scope, implementation duration, and technologies used.
4. Identify the proposed implementation team structure, key roles, and location of delivery resources.
5. Describe your approach to subcontractors and third parties and identify which parts of the proposed solution, implementation, hosting, support, or ongoing operations would rely on them.
6. Describe product roadmap, research and development investment, and expected support horizon for proposed technologies.
7. Provide information on financial stability appropriate for a long-term strategic technology relationship.
8. Identify any current or anticipated legal, licensing, product, or organizational conditions that could materially affect delivery or support.

18. Pricing Information Requested

This is an RFI, so estimates may be directional. Vendors should clearly state assumptions and distinguish one-time implementation costs from recurring costs.

Cost Area	Vendor Response Requested
Software / subscription	Licensing metric, quantity assumptions, tiers, annual fees, minimum commitments, expected annual increases and/or build out/purchase options with maintenance thereafter.
Implementation	Estimated range by phase or workstream, including discovery, vendor configuration and/or development, integrations, migration, testing, training, and cutover.
Hosting / infrastructure	Included or separate costs, cloud consumption assumptions, non-production environments, storage, bandwidth, backup, and DR.
Third-party products	Required licenses, services, connectors, or platforms not included in core pricing.
Support	Standard support, premium support, customer success, managed services, and after-hours support options.
Future changes / managed services	Typical rates, retainers, service tiers, or other pricing models for vendor-supported changes, enhancements, additional integrations, development, professional services, and optional managed services. Include typical rates, service tiers, and turnaround expectations. Include typical turnaround expectations.
Exit / transition	Data export, transition assistance, archive access, termination fees, and other exit-related costs.

19. Vendor Response Instructions

19.1 Requested Response Structure

1. Executive summary and recommended solution approach.
2. Solution architecture and deployment model.
3. Completed requirements response matrix.
4. Data integration and migration approach.
5. User experience and user-centered design approach.
6. Security, privacy, hosting, and operational model.
7. Implementation methodology, indicative schedule, and staffing model.
8. Support and service-management model.
9. Vendor qualifications and relevant references.
10. Pricing and commercial assumptions.
11. Risks, dependencies, assumptions, exceptions, and recommended next steps.

19.2 Response Scale

Code	Meaning
S	Supported out of the box / standard capability
C	Supported through standard vendor configuration or setup
D	Supported through custom development or extension
T	Requires a third-party product or service
P	Planned / roadmap capability; provide target availability

N	Not supported
NA	Not applicable to the proposed solution

19.3 Requirement Response Format

For each numbered requirement, vendors should provide the response code, a concise explanation, any relevant limitations, dependencies, additional licensing, third-party components, implementation assumptions, and ongoing vendor-service requirements. Marketing-only responses or simple yes/no answers are discouraged where material limitations or service dependencies apply.

20. Evaluation Framework

AAALAC International will review RFI responses to assess the suitability of proposed solutions for further consideration. Evaluation will consider functional capabilities, user experience, integration and data management, architecture, security and privacy, implementation approach, vendor qualification, ongoing support, flexibility, and estimated total cost of ownership.

AAALAC International may invite selected respondents to participate in additional discussions, demonstrations, workshops, or other evaluation activities. Participation in the RFI does not guarantee advancement to a subsequent phase or selection for a contract.

AAALAC International reserves the right to modify its evaluation approach, request additional information, or discontinue the RFI process at its discretion.

20.1 Potential Follow-up Activities

- Clarification questions and written follow-up.
- Vendor demonstrations using AAALAC-defined scenarios.
- Technical architecture and security review.
- Reference checks.
- Data migration and integration workshops.
- Proof of concept or limited technical validation.
- Formal RFP, pricing request, or contract negotiation.

21. Demonstration Scenarios for Short-listed Vendors

If vendors advance beyond the RFI stage, AAALAC International may ask them to demonstrate realistic scenarios rather than generic product tours. The final scenarios will be refined after internal process discovery.

Scenario	Expected Demonstration
External user journey	A user signs in, views relevant work/status, completes or updates a multi-step process, uploads supporting information, receives validation feedback, and sees next steps.
Staff operational workflow	An authorized staff member locates a record, reviews submitted data, requests corrections, updates workflow status, records a decision, and views complete audit history.
Integration event	A record is created or updated through an API or integration, validation occurs, downstream data is synchronized, and errors are visible and recoverable.
Routine business configuration	Demonstrate how an authorized AAALAC business user would modify a routine business configuration such as a deadline, label, notification, form instruction, business rule, or workflow element. Show applicable permissions, testing or preview capabilities, effective dating, audit history, and deployment. Also demonstrate how changes requiring vendor or technical support would be identified and handled.
Reporting	A user filters operational data, drills into detail, exports authorized information, and demonstrates row-level security.
Audit and support	A support or security administrator traces a user action or failed integration across application and integration logs without direct database manipulation.
Ad Hoc Data Access and Export	Demonstrate how an authorized AAALAC business user can identify a set of records, select relevant data elements, apply filters, and export a large dataset for independent analysis without vendor intervention. Show any applicable record-volume, field, format, or export limitations.

Appendix A — High-Level Requirements

The detailed requirements contained in this RFI describe AAALAC International's current understanding of the capabilities needed to support the future accreditation environment. The following high-level requirements summarize the principal outcomes the organization seeks from the accreditation engine. They are intended to provide context for the detailed requirements and should not be interpreted as replacing or limiting those requirements.

The proposed solution should:

- Support the end-to-end accreditation lifecycle within a cohesive operational environment while accommodating non-linear workflows, exceptions, and activities occurring outside the routine accreditation cycle.

- Provide secure, role-appropriate experiences for institutional users, AAALAC staff, peer reviewers, Council members, and other authorized participants.
- Support structured, configurable collection and management of Program Descriptions, institutional submissions, supplemental materials, and other information required through the accreditation lifecycle.
- Support reviewer identification, eligibility and expertise assessment, conflict-of-interest management, assignment, preparation, site-visit activities, and accreditation review.
- Provide configurable workflow, business rules, forms, communications, notifications, deadlines, and other operational capabilities that authorized AAALAC business users can manage where appropriate without routine vendor intervention.
- Reduce reliance on manual tracking, duplicate data entry, email-driven handoffs, spreadsheets, and staff-dependent institutional knowledge.
- Provide timely visibility into case status, workload, deadlines, exceptions, and operational performance.
- Enable authorized AAALAC users to report on, analyze, and export organizational data without routine dependence on vendor-developed reports or vendor-assisted data extraction.
- Integrate appropriately with AAALAC's other enterprise systems while allowing different systems to remain authoritative for functions such as financial management and long-term document retention.
- Protect confidential accreditation information through appropriate identity and access management, security, privacy, audit, and data-governance controls.
- Support responsible use of AI and emerging technologies while maintaining human oversight and AAALAC control over confidential information and AI-enabled functionality.
- Support migration, coexistence, archival access, and transition strategies appropriate to AAALAC's existing data and technology environment.
- Be maintainable, scalable, and adaptable as AAALAC's accreditation standards, workflows, forms, reporting needs, and global operations evolve.
- Minimize unnecessary vendor dependency and preserve AAALAC's ownership, access, portability, and control of its data and business configuration.

Respondents are encouraged to propose approaches that achieve these outcomes using standard or configurable platform capabilities and to identify areas where alternative approaches may provide greater efficiency, maintainability, or value.

Appendix B — Vendor Response Matrix

Vendors should provide a response for each numbered requirement contained in the RFI using the response codes defined in section 19.2. Responses should identify material limitations, dependencies, assumptions, third-party products or services, additional licensing or costs, and ongoing vendor-service requirements. Where a capability is supported differently across proposed products, modules, deployment models, or service tiers, the response should clearly identify those distinctions.

Vendors may copy this structure into a spreadsheet or document. All material exceptions, dependencies, additional products, and additional costs should be disclosed.

Req. ID	Response Code	Vendor Explanation / Evidence	Exception / Dependency	Additional Cost
[ID]	[S/C/D/T/P/N/NA]	[Response]	[If applicable]	[Yes/No; explain]
[ID]	[S/C/D/T/P/N/NA]	[Response]	[If applicable]	[Yes/No; explain]
[ID]	[S/C/D/T/P/N/NA]	[Response]	[If applicable]	[Yes/No; explain]
[ID]	[S/C/D/T/P/N/NA]	[Response]	[If applicable]	[Yes/No; explain]

Appendix C – RFI Schedule

AAALAC International anticipates the following schedule for the RFI process. Dates are subject to change at AAALAC International's discretion. Respondents will be notified of material changes to the schedule as appropriate. Responses are due by 5:00 p.m. Eastern time.

Milestone	Target Date
RFI issued	October 13 2026
Vendor intent to respond (optional)	October 23, 2026
Vendor questions due	October 28, 2026
AAALAC responses to vendor questions	November 4, 2026
RFI responses due	November 20, 2026
Internal review and scoring	November 23 – December 11, 2026
Short-list notification	December 15, 2026
Vendor demonstrations / workshops	January 11-29, 2027
Decision on next procurement phase	February 12, 2027

Appendix D – Optional/Adjacent Capabilities

The capabilities described in this appendix are not required components of the primary accreditation-engine scope. AAALAC International is interested in understanding whether respondents offer these capabilities through the proposed platform, related modules or products, partner solutions, integrations, or other approaches.

Respondents may address one, both, or neither of these optional areas. The absence of these capabilities will not, by itself, render a proposed accreditation-engine solution nonresponsive. Where capabilities are proposed, respondents should clearly identify the solution approach, relationship to the primary platform, implementation implications, dependencies, licensing and recurring costs, data integration requirements, and whether third-part products or services are required.

D.1 Optional Volunteer Management Capabilities

AAALAC International's accreditation program relies on a large international network of volunteers serving in a variety of reviewer, Council, leadership, and other organizational roles. Information necessary to identify, qualify, assign, and manage reviewers for specific accreditation activities is included within the primary accreditation-engine scope. This optional capability addresses the broader volunteer lifecycle, including recruitment, selection, appointment, onboarding, service, reappointment or transition, and completion of service.

AAALAC International does not require the solution to conduct elections or provide broader committee- or board-management functionality. Where volunteer appointments result from processes conducted outside the platform, the solution should support recording the resulting appointment or status change and initiating appropriate downstream actions.

- **Volunteer profiles and records** — centralized volunteer records including contact information, professional background, qualifications, expertise, affiliations, languages, geographic information, status, and service history.
- **Recruitment and application** — volunteer applications, collection of supporting information, review and evaluation workflows, recording of selection outcomes, and applicant communications.
- **Appointments, terms, and service recognition** — tracking of appointments, election or selection outcomes where relevant, roles, appointment and effective dates, terms of service, term limits, renewals/reappointments, status changes, transitions between roles, and completion of service. The solution should support generation, review,

issuance, and retention of appointment, reappointment, transition, and other service-related correspondence, including recognition or thank-you correspondence at the conclusion of service.

- **Onboarding and required documentation** — onboarding activities, required agreements or attestations, policy acknowledgments, training requirements, and completion tracking.
- **Qualifications and continuing eligibility** — tracking of qualifications, required training, continuing education, certifications, expirations, and other eligibility criteria.
- **Organizational roles and service** — management of multiple volunteer roles, organizational assignments, leadership positions, and transitions between roles.
- **Communications and engagement** — targeted communications based on role, region, expertise, status, or other characteristics, including appropriate tracking of communications and participation.
- **Volunteer activity and service history** — consolidated history of volunteer participation, assignments, organizational service, training, and other relevant activities.
- **Reporting and analytics** — reporting related to volunteer demographics, expertise, geographic distribution, recruitment, retention, participation, workload, succession, and other organizational needs.
- **Integration with accreditation activities** — reuse of relevant volunteer information within the accreditation engine without duplicative entry or maintenance, while maintaining appropriate permissions and separation of functions.

Respondents should identify which capabilities are native to the proposed accreditation platform, available through another product or module, or dependent upon a third-party solution. Responses should also describe relevant licensing, implementation, integration, data-management, and ongoing support implications.

D.2 Site Visit Expense/Reimbursement Management

Site visits and face-to-face Council Member meetings involve travel expenses incurred by volunteers. AAALAC International has encountered hurdles when considering off the shelf expense report processing software, including the calculation of honorarium for these events and varying policies per reportable regions. There is no intention of using a respondent's software or sub-processing software to make payments.

Respondents should describe available capabilities, if any, for:

- **Volunteer profile update –** provide volunteer input capability in an "expense report" format for travel categories (institution visited, council meeting attended, expense descriptions, dates, amounts – note that expenses in multiple currencies are incurred) in a volunteer's database profile for the given event. Provide temporary document storage capability for volunteers to upload receipts and supporting documentation to the event folder.
- **Honorarium –** provide an embedded accurate calculation of honorarium from policy parameters by volunteer role, event type and duration (i.e. number of site visit or council meeting days or half days)
- **Expense Reimbursement Submission –** upon volunteer submission, create a file for Finance department for review, approval, rejection, correction, and/or exception handling prior to upload into the accounting software. Submission would include all expense category input and the associated honorarium total (not separate files for multiple payments made by AAALAC)
- **Expense policies and validation** — configurable expense categories by AAALAC reportable region, limits, validation rules, and identification of exceptions (i.e. volunteers in one of AAALAC's current three region reportable business model will have different policy rules for meals: per cost or per diem).
- **Status and communication** — visibility for submitters and Finance staff into submission, review and approval status including notifications where appropriate.
- **Reporting and auditability** — reporting on expenses by event, unit/institution, region, category, time period, or other relevant dimensions, and audit history.

Respondents should identify whether expense/reimbursement functionality is native to the proposed platform, available through a related product or module, dependent upon a third-party solution, or better supported through integration with a dedicated expense-management or financial system. Respondents are encouraged to recommend the approach they believe would provide the best balance of usability, financial controls, maintainability, integration with accreditation activities, and total cost.