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CONSULTING

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Section One: RFP Content

What to Include in an RFP for an Association-Focused Technology Assessment Consultant

Looking to hire a consultant to assess your current technology ecosystem and create a future roadmap? A clear, focused RFP will help you find the right partner. Below are seven key sections your RFP should include, tailored to your organization's needs.

1. Introduction and Background (Describe your organization)

- Describe your organization (mission, size, membership structure, etc.)
- Provide a list of systems and a diagram (if available) of your technology ecosystem: include current systems in use, indicate systems slated for sunset, and notate potential new technology purchases
- Reason for pursuing a technology assessment at this time (e.g. Board directive, strategic initiative, new executive leadership)

2. Project Objectives (Describe your organization objectives)

The primary goals of this project are:

- Purpose of the RFP (e.g., hire a consultant to assess the effectiveness of your current AMS, CMS, LMS, and Finance systems and provide recommendations for future technology-focused success)
- Brief statement of the project's importance and goals. What you hope to achieve (e.g., identify opportunities for process improvement, understand current technology marketplace, inform a 5-year plan for strategic technology decisions)
- Timeline overview and decision urgency (e.g., new strategic plan, executive transition, platform issues/misalignment)
- Any particular focus areas for this project (ex: we'd like to focus on marketing systems) or areas to exclude (ex: we are comfortable with our current network infrastructure and Microsoft tech stack)

3. Scope of Work (Include any/all services needed)

The selected consultant will:

- Conduct discovery sessions with stakeholders to assess satisfaction and identify improvement ideas
- Analyze current workflows, pain points, and "gaps" in [Organization's Name]'s processes
- Evaluate effectiveness of current pain points and systems designated for focus
- Provide recommendations on best allocation of staffing resources
- Deliver both long-term and short-term recommendations to optimize [Your Organization's Name]'s use of technology systems and related processes
- Document pain points, recommendations, and suggested timeline /roadmap

4. Proposal Requirements (Consultants must include)

- Company overview and qualifications
- Staff size and experience (# of FTEs, contractors)
- Sample staff qualifications/bios
- Relevant experience with similar projects requiring technology assessments and strategic recommendations
- Project methodology and approach
- Post-assessment service offerings
- Timeline and availability
- Cost and fee structure
- Client references (3)

5. Evaluation Criteria (Suggested criteria to evaluate RFP)

Proposals will be evaluated based on:

- Relevant experience and qualifications
- Understanding of project objectives
- Methodology and approach
- Consultant team qualifications/bios
- Long term partnership for post-assessment support
- References and client feedback
- Culture fit with [Your Organization's Name]
- Price and overall value

6. Timeline

- RFP Issued: [Insert Date]
- Deadline for Questions: [Insert Date – generally two weeks from RFP issue]
- Answers Provided to All Respondents: [Insert Date – generally one week after questions deadline]
- Proposals Due: [Insert Date – generally one to two weeks from provision of answers]
- Proposal Review: [Insert Date Range – give yourselves at least two weeks]
- Interviews (if applicable): [Insert Date Range – give yourselves at least two weeks]
- Consultant Selected: [Insert Date]
- Anticipated Project Kickoff: [Insert Date]

7. Contact Information

- Who to contact with questions
- Proposal addressee name and address
- How to submit proposals (postal mail, email, etc.)

Section Two: Evaluation Tools

Consultant Evaluation Criteria (Internal use/not included in RFP)

Here are some key considerations that can help your organization as you evaluate consultant presentations and RFP responses:

1. Experience with Similar Organizations

- Staff Size and Experience: What is the size of the consulting company? What is the typical staff background and work experience?
- Relevance: Have they worked with associations of similar size, structure, and complexity?
- Industry knowledge: Do they understand your industry (e.g., trade associations, nonprofits, credentialing bodies)? Do they keep current with the association technology landscape and emerging trends (e.g., integrations, automation, AI)?
- Case studies: Look for demonstrated results in past engagements.

2. Methodology and Approach

- Structured process: Do they have a proven framework for stakeholder engagement, technology/process assessment and delivery of recommendations?
- Customization: Are they willing to tailor their approach to your unique culture and goals?
- Tools: Do they provide templates and project management resources?

3. Consultant Team Experience

- Individual expertise: Who will actually be doing the work — senior team members or junior staff?
- Credentials: Do they hold certifications (e.g., PMP, CAE)
- Related Perspective: Do they have association leadership experience and/or AMS industry vendor experience?

4. Post-Assessment Support

- Delivery on recommendations: Can they help you plan or oversee subsequent system selections or process creation?
- Change management: Do they offer communication planning or training strategies for team member engagement?

5. Communication and Cultural Fit

- Style and responsiveness: Are they collaborative, transparent, and easy to work with? Does this match your communication style and organization culture?
- Do they understand your values? A good cultural fit ensures smoother collaboration and better results.

6. References and Reputation

- Client feedback: Were the references contacted enthusiastic about the consultant's team and deliverables? Would they consider hiring them again?
- Reputation: Are they known in the Association or AMS circles (e.g., speaking at conferences, participating with/leading related organizations)?

7. Price and Value

- Price comparison: Ensure you are comparing apples-to-apples when considering proposal pricing. Contact respondents about missing information or to clarify unclear costs when needed.
- Value Add: What services differentiate the respondents from one another?

Evaluation Scorecard

Here is a sample Consultant Evaluation Scorecard you may use to compare technology assessment consultants. You can score each consultant on a scale of 1–5 (1 = Poor, 5 = Excellent), and total the scores for an objective comparison. Criteria sections can also be weighted in your calculation if you choose.

Note: It is recommended this tool be used as a component of the selection process, rather than serving as the sole decision mechanism.

AMS Assessment Consultant Evaluation Scorecard			
Evaluation Criteria	**Consultant A**	**Consultant B**	**Consultant C**
1. Relevant Experience			
Worked with similar orgs (size, sector)			
Demonstrated results / case studies			
2. Methodology and Tools			
Clear, structured process			
Customization to your needs			
Use of templates, proven methodology and deliverables			
3. Industry and Tech Expertise			
Knowledge of association technology market			
Up-to-date on trends and best practices			
4. Team Qualifications			
Seniority and experience of assigned staff			
Professional credentials (e.g., PMP, CAE)			

5. Post-Assessment Support			
Ability to assist with technology selections and/or process updates			
Offers change management or training help			
6. Communication and Fit			
Responsive, use of collaborative language			
Cultural alignment/fit			
7. References and Reputation			
Strong references from similar clients			
Recognized industry reputation			
8. Price and Value			
Quoted price			
Value-added offerings			
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TOTAL SCORE (out of 85 total)			