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Section One: RFP Content

What to include in an RFP for an AMS Implementation Consultant

If you're looking to hire a consultant to help your organization implement an Association Management System (AMS), a clear and focused Request for Proposal (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.)
- Current systems in use (include your current AMS, accounting platform and any technology you will want to integrate with the new AMS)
- Reason for pursuing a new AMS (include key organizational pain points this will help resolve)

2. Project Objectives (Describe your organization objectives)

The primary goals of this project are:

- Purpose of the RFP (e.g., hire a consultant to guide the implementation of [AMS system name], which includes vendor oversight, implementation scope management, and successful system deployment by MONTH/YEAR)
- Brief statement of the project's importance and goals. What you hope to achieve (e.g., streamline operations, improve member experience, data integration from disparate sources)
- Timeline overview and decision urgency (e.g., contract expiring, plan to unveil at YEAR Conference/Congress)

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

The selected consultant will provide:

- Project management services to oversee AMS vendor performance, manage project scope and timeline, convene stakeholders as needed, communicate risks and opportunities
- Recommendations on best practices and guidance for building processes, workflows, and necessary configurations
- Direction on data migration methodologies; oversight for data transformation and import
- Support for [#] system integrations (AMS vendor responsible for integration execution)
- Scheduling and facilitation of AMS vendor-led training sessions
- Creation and execution of organization-specific test cases
- Go-live support and post go-live recommendations

4. Proposal Requirements (Consultants must include)

- Company overview and qualifications
- Staff size and experience (# of FTEs, contractors)
- Sample staff qualifications/bios
- Relevant experience with AMS implementation projects
- Experience implementing [AMS system name]
- Implementation project methodology and approach
- Post-implementation 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 team qualifications
- Understanding of project objectives
- Methodology and approach
- Long term partnership for post-implementation support
- References and client feedback
- 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 and Specific AMS

- 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?
- AMS Experience: Have they implemented this specific AMS in the past? Do they understand how to help you transition from your current AMS to the new system?
- Industry knowledge: Do they understand your industry (e.g., trade associations, nonprofits, credentialing bodies)? Do they keep current with the AMS landscape and emerging trends (e.g., integrations, automation, AI)?
- References/case studies: Look for demonstrated results in past engagements.

2. Methodology and Approach

- Structured process: Do they have proven project methodologies and replicable tools?
- Customization: Are they willing to tailor their approach to your unique culture and goals?

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-Implementation Support

- Post-implementation support: Can they work with you through the continuum of adoption and evaluation of future needs, or do their services only include implementation support?
- Change management: Do they offer communication planning or training strategies for staff and member adoption?

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 AMS implementation 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 Implementation Consultant Evaluation Scorecard

Evaluation Criteria	Consultant A	Consultant B	Consultant C
1. Relevant Experience			
Worked with similar orgs (size, sector)			
Experience implementing specific AMS			
Up to date on industry trends and best practices			
Demonstrated results / references			
2. Methodology and Tools			
Clear, structured process			
Customization to your needs			
Use of templates/ replicable tools			
3. Team Qualifications			
Seniority and experience of assigned staff			
Professional credentials (e.g., PMP, CAE)			
4. Post-Implementation Support			
Ability to assist with user adoption and planning for future needs			
Offers change management or training help			

5. Communication and Fit			
Responsive, use of collaborative language			
Cultural alignment/fit			
6. References and Reputation			
Strong references from similar clients			
Recognized industry reputation			
7. Price and Value			
Quoted price			
Value-added offerings			
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TOTAL SCORE (out of 85 total)			