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Section One: RFP Content

What to include in an RFP for an AMS Selection Consultant

If you're looking to hire a consultant to help your organization select a new Association Management System (AMS), a clear and focused Request for Proposal (RFP) will help you find the right partner.

Below are eight 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
- Reason for pursuing a new AMS (include key pain points in current system)

2. Project Objectives (Describe your organization objectives)

The primary goals of this project are:

- Purpose of the RFP (e.g., hiring a consultant to guide AMS evaluation and selection processes).
- Brief statement of the project's importance and goals. What you hope to achieve (e.g., streamline operations, improve member experience, data integration)
- Timeline overview and decision urgency (e.g., contract expiring, platform issues).

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

The selected consultant will:

- Conduct discovery sessions with stakeholders
- Analyze current workflows, pain points, and "gaps" in functionality
- Develop comprehensive AMS requirements
- Perform market research on AMS vendors
- Draft and distribute an RFP to qualified AMS vendors
- Manage vendor Q&A and responses
- Schedule and facilitate vendor interview sessions
- Assist with scoring, demos, and final selection
- Support contract negotiation (optional)

4. Project Deliverables

The selected consultant will be responsible for the delivery of:

- Project plan, cost analysis, and high-level timeline and milestones
- Discovery summary and requirements documentation
- AMS vendor market analysis and shortlist
- AMS RFP document
- Vendor evaluation matrix
- Implementation Support services scope (optional)

5. Proposal Requirements (Consultants must include)

- Company overview and qualifications
- Staff size and experience (# of FTEs, contractors)
- Sample staff qualifications/bios
- Vendor neutrality (any affiliations or partnerships)
- Relevant experience for AMS selection projects
- Project methodology and approach
- Post-selection service offerings
- Timeline and availability
- Cost and fee structure
- Client references (3)

6. Evaluation Criteria (Suggested criteria to evaluate RFP)

Proposals will be evaluated based on:

- Relevant experience, qualifications, and vendor neutrality
- Understanding of project objectives
- Methodology and approach
- Consultant team qualifications/bios
- Long term partnership for post-selection support
- References and client feedback
- Price and overall value

7. 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]

8. 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 AMS 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 requirements gathering, vendor evaluation, and selection?
- Customization: Are they willing to tailor their approach to your unique culture and goals?
- Tools: Do they provide templates and project management resources?

3. Vendor Neutrality

- Independence: Are they truly vendor-neutral, or do they have affiliations or referral relationships with AMS vendors?
- Bias risks: Are there any concerns that this consultant may receive commissions or incentives from vendors, which could compromise objectivity?

4. 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?

5. Post-Selection Support

- Implementation support: Can they help you plan or oversee implementation, or do their services only include selection?
- Change management: Do they offer communication planning or training strategies for team member adoption?

6. 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.

7. 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)?

8. 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 selection 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 Selection 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 scorecards, templates, proven deliverables			
3. Vendor Neutrality			
No ties/commissions with AMS vendors			
Demonstrates objectivity			
4. Industry and Tech Expertise			
Knowledge of AMS market			
Up-to-date on trends and best practices			

5. Team Qualifications			
Seniority and experience of assigned staff			
Professional credentials (e.g., PMP, CAE)			
6. Post-Selection Support			
Ability to assist with implementation			
Offers change management or training help			
7. Communication and Fit			
Responsive, use of collaborative language			
Cultural alignment/fit			
8. References and Reputation			
Strong references from similar clients			
Recognized industry reputation			
9. Price and Value			
Quoted price			
Value-added offerings			
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TOTAL SCORE (out of 95 total)			