

RFI Instructions

RFI should include:

- A description of the organization – brief history, mission, and profile of the professional community serviced
- A narrative about why the organization is seeking information about association management services
- Specific challenges currently faced for which a solution should be proposed
- Qualification criteria, for example:
 - Must be an accredited AMC
 - Must have a specific geographic location with 8am-5pm member support
 - Must have meeting space for board/committee/chapter meetings
 - Must have # CAEs on staff
 - Must have # CMPs on staff
 - Must offer specialist staff support rather than a “many hats” model
 - Must have at least X% of business from national/international clients
 - Must have ## of clients for breadth of best practice sharing
- Decision-making timeline/schedule
- Contact information for questions
- Required format of responses
- Confidentiality requirement of respondents

RFI Respondents should include:

- No more than 3 pages
- Resumes of key personnel
- Key differentiators that make your company stand out
- How your company aligns with the organization
- How you would help us address our current concerns

Suggested RFI process:

1. Draft RFI and get group input to ensure a clear and holistic picture of the organization’s current situation.
2. Circulate the RFI to a broad spectrum of possible candidates with a clear two-week deadline.
3. Select top 1-3 firms to meet for open but confidential discussions.
4. Based on meeting(s) invite a proposal from the firm that seems like the best fit.

For fun, below are a couple of resources that talk about the inefficiencies of using an RFP process in response to the need to perform due diligence. In any instance, due diligence should be about qualification and compliance of services with scope of service:

AMCI article:

<http://www.amcinstitute.org/?page=dearvolunteerleader&hhSearchTerms=%22diligence%22>

Cal Harrison video:

<https://www.speakermatch.com/profile/calharrison/video/3058>

ASAE Operating Ratio Report of association resources invested in overhead as a ratio of total expenses

<https://www.asaecenter.org/publications/108719-association-operating-ratio-report-15th-edition>