



# A GUIDE TO RFPs FOR ASSOCIATIONS

A step by step overview on how to meet your chapters' management needs

# INTRODUCTION

It is very common within the association space to have various departments in the same organization trying to solution the same problems with different approaches. In our experience this happens frequently when looking to provide local chapters tools that will help them manage their chapters more effectively. This toolkit is meant to help with that process by providing you with a step-by-step overview on how to find a solution for your chapters' management needs and helping with your analysis so you can easily compare vendors' abilities.

An RFP provides a standard process for collecting information, to align specific products and/or services with an organization's needs and available vendor options. Responses help uncover the skills and competencies of potential vendors, for a clear picture of how and if a vendor can meet your needs, at your budget, and in your timeframe.

## **What is an RFP?**

A Request for Proposal, RFP, is used to solicit proposals, typically through a standardized process. Organizations with a need for a specific product or service often send RFPs to potential vendors. Bids are accepted by a certain date, proposals are compared, and the best fit vendor is selected.

## Step by Step Overview of an RFP process

A properly executed RFP can lead to strong, long-lasting partnerships. For an RFP process to be effective, you should follow these primary steps.

# STEP 1

## DETERMINE YOUR EXACT NEED

It's critical to identify, early on, what you want in a solution. Look at the association's needs holistically. Before you send out the RFP, pinpoint the specifics you need for the project to be considered successful, including scope, budget and timing. It is also important to prioritize your needs and look at what is a must have, nice to have, and what is not important to your organization.

Perhaps you need an association management software (AMS) platform for your local chapters to better manage their administrative needs. Determine those needs for the AMS to fit certain technical specifications, as well as capabilities, implementation, training, and long-term support requirements. Set the goals and outcomes you expect, like saving volunteers' time, delivering a ROI, and/or giving you access to relevant information to manage your portfolio of chapters.

Clarifying the details and documenting them helps ensure everyone agrees from the start. Plus, those responding to the RFP will then all provide similar information, making it easier to compare and select the right solution.

# STEP 2

## ASSEMBLE THE RFP TEAM

For the RFP process to be successful, it must be a team effort. Using our AMS example, choosing the right system requires a multi-functional team with individuals from each area the change will affect, oftentimes this includes membership, marketing, chapter liaisons, local chapter leaders, and more. The team should have an executive advocate within the association, to help overcome objections and secure buy-in and approvals.

Everyone on the team should contribute, share opinions, and provide their area's requirements. Since the AMS will be for you and your chapters, it's critical that the team should have chapter representation. Schedule regular meetings to stay on track and keep everyone accountable.

# STEP 3

## DEVELOP THE RFP REQUIREMENTS

Compile your requirements based on the needs outlined by your team. If you already have a system in place for your chapters, analyze what works well with how you currently operate and what you would like to improve. If you don't have an AMS for your local chapters, start by determining what an AMS should do for your chapters and your association. This is also the time to figure out the type of AMS that would not be a good fit. Overall, determine the outcomes you're looking for to fit your association's goals.

Clarifying these details prior to sending out an RFP lets you review responses more easily and make it more likely that you will choose the right solution, as you'll have a standard list of abilities to look for in vendors and compare between responses. Bear in mind no solution will match your needs perfectly so it's a matter of selecting the best fit to match your requirements as closely as possible.

### Top AMS Capabilities to Include in an RFP

Below is a list of the top capabilities that should be considered in an AMS RFP. All positively impact chapters and the association, as tasks and functions become less stressful, less time-consuming, and more accurate, resulting in better outcomes.

- Member record management and data synchronization
- Tracking dues and non-dues revenue sources
- Delivery of current, relevant content
- Branding and consistency across chapter websites and email
- Support for board members, including training, transition, overall direction
- Email marketing
- Chapter management guidance and ideas
- Security
- Reporting
- Vendor stability
- Pricing (initial set-up and ongoing service)
- Flexibility for local chapters

A great benefit for the association that should be included when evaluating vendors is the ability to have a dashboard view into chapter activity. This will make your association aware of what the chapters are

doing and help the chapters out when they are struggling, or reward those that are successful, ensuring the overall success of the association.

On the other hand, a great benefit for chapters when looking at AMS vendors is the ability for an automated member data sync. This saves chapters time by not having to download their roster from the association and then import it into their system – this gets done automatically for them. And, with this automation, everyone is working with the same data, giving you great confidence in what they're seeing and using.

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## STEP 4

### IDENTIFY POTENTIAL VENDORS AND SEND THE RFP

Once your RFP document is ready – review it for correctness and completeness – it's time to send it to potential vendors. Keep your list of vendors relatively small, as sending it to too many vendors can make it time-consuming and difficult to review responses. As you have already determined your RFP requirements, you have what you need to determine the vendors that could potentially meet those needs.

Consider your deadline. Allow enough of a response window so that vendors can gather the answers you're looking for.

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## STEP 5

### REVIEW AND COMPARE RESPONSES

Review responses against your requirements and compare responses between vendors. Your RFP team is important here. All who will be affected by the solution need to review the responses so you can make a team decision.

Each software platform is developed a certain way, and every organization operates in its own way. When you find a vendor you're interested in, you may find that their capabilities match most of your requirements.

Choosing an AMS comes down to reviewing the software against your needs and the needs of your chapters, identifying and understanding any gaps, and determining the features that are musts and those you can live without. If there is a gap, engage with the vendor to find a solution.

To help with your analysis and easily compare vendors' abilities, we've created an RFP scoring template. [PDF](#) | [EXCEL](#)

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## STEP 6

### SELECT VENDOR

**R**eview the vendors and further analyze them as necessary to find the solution that will work best, in terms of the product, services, and price. Once you've identified the top vendors, you should meet with them to see a product demonstration, discuss and solution gaps between their capabilities and your needs, and ask any clarifying questions.

After you've completed your review and identified the vendor you believe is the best fit, select that vendor.

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## STEP 7

### IMPLEMENT AND MAINTAIN THE SOLUTION

**T**he vendor you select needs to be able to support your implementation fully while providing the onboarding, guidance, and training your association and your chapters need. The support should not only be for the short- and long-term, but include resources for the crucial times when the board transitions.

# CONCLUSION

We have experienced various levels of compliance with these steps when associations are looking for an AMS solution for their local chapters. There are a lot of options to evaluate whether that be investing in a custom solution which could be costly and doesn't provide the support need or to allow your chapters to all operate on various systems of their own choosing. Some organizations will quickly solution something that meets their needs at the association level without careful consideration of how their chapters will be supported. This typically backfires quickly and the time they invest in backtracking is not very useful. We wanted to offer this guide to help you get it right the first time for both you and your local chapters.

If you are looking for any additional guidance please reach out to us at [nationals@starchapter.com](mailto:nationals@starchapter.com).

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## 1. RFP SCORING TEMPLATE PDF

[https://www.starchapter.com/downloads/rfp\\_scoring\\_template.pdf](https://www.starchapter.com/downloads/rfp_scoring_template.pdf)

## 2. RFP SCORING TEMPLATE EXCEL

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