SLA AMC Interview & References Questions

Round One Interviews

Mission / Client Mix / Fit

- How does SLA, in terms of membership size, level of revenue and range of complexity of issue & concerns, compare to your current client mix?
- Please identify 3 to 5 of your firm’s major strengths that would support a decision for SLA to contract with your firm.
- Please identify a situation where a partnership or project you were involved in did not meet objectives or go well. What were the reasons, what warning or “road signs” were missed to avert the results, and what did you learn from the situation.
- What are your firm’s strategic goals & direction for the next two years?

Global Outreach

- As described in the RFP, SLA is an international organization with members in all corners of the globe.
- Please identify other clients you have who have active membership beyond North America.
- In what other countries do you have offices or alliances/partnership with similar organizations?
- Please describe how you adapted your service offering to meet the specific requirements, operational needs and cultural differences of other global locations.
- How do you support requirements for locations in different time zones?

Services & Technology

- Do you outsource any management functions or services, such as data management, meeting planning, financial record keeping, IT support? If yes, please explain the terms of the agreement with the sub vendors and whether there are Service Level Agreements in place.
- Is your approach to offer Full Service Agreement only, or do you also offer Stand Alone or Segmented services or functions?
- Do you have and offer a Service Level Agreement to your clients?
- How have you expanded and enhanced your service & support level over the past two years?

Technology

- Please review and explain the IT tools and resources you would make available to SLA.
- Would SLA retain any of our existing technologies or would we have to migrate to your IT toolkit?
- Who will make decision about what software, IT tools and applications would be used at SLA?
- Do you have the capability to design and maintain our website? How will that relate to our current processes in place and will we have our own domain?
● Please describe the back-up systems and disaster plans for your IT environment?

Facilities and Resources
● SLA currently has a number of resources and equipment to support various functions & tasks. What will happen with those? Will they be transferred to your facilities? Will some be retained?
● SLA currently owns our building. What is your approach on the best way manage this asset and the optimization of the investment in the building?
● What is your approach to office space and where SLA staff will be located?
● How will SLA documents be archived and stored? What level of access will SLA staff have to these documents?

Financial Resources, Oversight & Management
● What Financial Management Tools do you use?
● What will be your approach to managing the financial affairs of SLA?
● What is your process for signing and processing payments and checks?
● Do you have a CPA on staff and will that person be involved in the oversight of SLA finances?
● How often will the Board receive Financial and Progress Reports?

Revenue Generation and Membership
● Please give some of your ideas on how SLA can increase membership.
● Please give some specific ideas and examples for product development & services – that would benefit the membership, be relevant to current market needs and could generate non-dues revenue for SLA.
● Do you have current staff that can support a Fund Raising campaign? How have they been successful with other clients?
● There has been some discussion about moving toward a “Customer Centric Model” over a “Membership Centric Model”, which would be delivered through high quality product and services that were relevant to today’s market environment. How would you approach such an effort and have you been successful in similar efforts in the past?

Meetings & Conference Management
● SLA has a mixed and complex approach to Conference Planning including Division, Cabinets and Conference & Professional Development Staff – how would you work this diversified group, who are a mix of Staff and active volunteers? Do you have experience with the logistics and challenges of this form of Conference Planning?
● What is your current working relationship with city convention visitor bureaus, national hotel chains and other similar conference vendors? How could this be beneficial to SLA?
● Can you support SLA staff for Conference Planning for 2016 based on potential changes & needs for staff?
● What ideas do you have about increasing Conference attendance levels?
What ideas do you have about increasing participation at SLA meeting and functions at the Division, Cabinet and Chapter levels?

Networking is consistently one of the top reasons our attendees attend, or not, our annual conference. Please provide some examples of innovative ways to facilitate and increase networking opportunities at the SLA Conference.

Public Image & Outreach

If SLA selects you to be our AMC partner – what is your perception on what the public outreach will be, how will SLA be presented to the market place & membership and how will this be different from our current market approach?

Who will be the official SLA spokesperson?

How will you/SLA handle public relation inquiries?

How will you/SLA handle public relationship crisis?

How will you work to market and brand SLA going forward?

Staffing Approaches and Alternatives

In the RFP we stated that SLA was looking to take a “hybrid approach” to staffing – taking the best aspects of both current SLA staff and the knowledge and skills based within the AMC. Please tell us how you would describe and define a “hybrid approach”, how you would implement it at SLA and how you have worked with this concept with other clients.

Do you currently have a model on how many of your staff would be assigned to SLA? Is this scalable based on needs, knowledge learned and other factors?

What is your process for making staffing decisions? What will be the role of current SLA Officers and Staff in that process?

What process & measures do you take to train your staff? Is there a staff training program in place? What does your staff do to keep current professionally?

Do you propose that you will put in one dedicated executive or will a team of individuals?

Fee Models

What is the basis for your fee model

- fixed cost such as staff plus margin
- fee based on the size of the client

Please give some details.

Do you have a fixed fee model? Are there expenses not included in the fee model?

SLA currently utilizes the services of a number of member volunteers who support multiple tasks – resulting in a material impact on controlling and reducing expense levels. Would you be comfortable working with this model and approach? Have you worked with this mix of client/volunteer in the past and has it been successful?

Please describe your contract terms and what you would propose as the length of the agreement. What are the specific terms for negotiating contract revision based on knowledge learned or cancellation or termination.
Questions Specific to RFP Response

- Please share examples of successful hybrid models you have worked with.
- Please clarify that services obtained from sister divisions (such as Red Chair and Front Row) are included in fee model you have proposed.
- Clarify what you mean on page 10 about securing tax-exempt status for Chapters.
- You define on page 13 that you would develop new products & services – please give us two examples of potential products you would develop.
- How do you envision a plan for clear, open productive and honest communications between the AMC, Board and Staff?
- For the Conference – please provide three examples of ways that attendees will see improved learning and content through your management.
- You note that you will bring “new creative ideas to SLA to deliver content and an experience that meets members’ needs.” Can you please provide specific examples of items you propose for client on a tight budget?
- You state that your company is organized into 6 industry segments – Medical, Allied Health, Scientific, Credentialing, Corporate and Entrepreneurial. Which of these would SLA fit in, and why?

Round Two Interview Questions

Implementation Process, Timing and Review:

The objective of these questions is to get insight into how your firm would transition, consolidate and implement the processes, resources and staff of SLA with those of your firm.

Specifically we ask that you to outline how you would manage this process - and based on your approach – what would SLA look like in 3 months, 6 months and in one year. Your commentary should include:

- Review and consolidation of current systems & resources in place at SLA
- Financial practices and controls
- Physical location – who will be in the current SLA offices and how will that be consolidated with your offices
- Review of SLA staff and how they will be evaluated and melded with your staff, as well as what measurement criteria you would use
- The communication strategy for members and vendor partners - both in presenting positive news as well as dealing with concerns, incorrect and incomplete information with may be circulating within the membership
- Further definition of the work scope and related fee models
- Any other factors that you think are relevant

As you formulate your answers and develop the transition models we would like you to think about the impact on SLA Membership and how the Membership will relate and react. Please use examples from experiences with current and prior clients. Allocate 30 to 45 minutes to this set of questions.
We would like this discussion to be interactive and conversational. Assume that there will be multiple questions as you present your approach for the transition models. If you prepare a Power Points or other documentation as tools to present your approach - please use them in a support role – our point is that we are not looking for the primary focus to be on a presentation, rather we are looking for an interactive discussion.

Abstract Questions

The purpose of these questions is to get insight and understanding about the culture, mindset and thought process of your firm, as well as the leadership and management of the firm. As you prepare your answers please do not relate it to SLA or your own firms – rather talk about the questions as if you were having a discussion with any individual in any facet of your life.

Obviously, there are no right or wrong answers. We will use your response as a means to help us understand how you would formulate and develop responses to current and future issues and opportunities.

Question One – The Computer

The invention and evolution of the computer has had a major influence in how we all live. This started with the mainframe and, over the last 20 years, to the evolution of the PC, Smart Phones and numerous other devices.

This has resulted in many positive outcomes – including the way that we work, the level of work that we can individually perform, the level of data that we can use to support our business requirements, as well as breaking down many parameters and limitations we encountered in the past. Beyond these points, there are many other benefits, but for this question we would like to focus on the total impact of the PC, and other IT tools on our work.

On the other side of the questions, there have been other levels of impact – many having to do with how we interact and socialize with our co-workers, family and friends. As a result of the PC and other IT tools, many people now work from their homes and no longer have any “face to face” interaction with their co workers. We hear about, and see stories about young people who focus solely on their devices, not developing social skills and not interacting with their peers. We have all been to restaurants and other events and have seen families at the dinner table where everyone is looking at their own phone or device, not interacting with each other.

Our questions to you are – what do you think about this issue – has the evolution and increased usage of PC’s and other tools impacted the level of interaction within our culture? Is this a real issue or will it evolve and repair itself over the course of time? Will it impact how companies perform and how families behave? What can be done to channel all of the benefits listed above while still maintaining positive, proactive and added value interaction?

Question Two – Them and Us

All of us, as we look at all facets and corners of our live, have opinions - which by definition will be different from other cultures, organizations and people. Some of these
points of view can be based on global, geographic, religious, economic, social and familial factors and points of view.

Often the outcome of these issues results in a Them and Us mind set which impacts how many of us approach and deal with many of the issues. The Us is our own point of view – what we think is right and what we think should be done – and the Them is generally the opposite which we would like to have changed to the Us approach.

Our questions to you are – how do you deal with the Them and US mindset? How do you deal with opposition and how open are you to an alternative point of view? What would you do to convince someone of the error in their thinking and the need to see the wisdom of your thinking? What are the reasonable criteria for accepting the Them approach?

Please allocate 15 minutes for your response to each of the two abstract questions. We would like this to be purely conversational. Remember there are no right or wrong answers.

Questions and Open Discussion

The objective of this point is to allow for open dial (90x710) between SLA and your firm. Please use this as an opportunity to ask any questions that you believe are pertinent to your performance and execution level of being the AMC for SLA.

We are allocating 15 to 30 minutes for this discussion. If we do not have adequate time to respond to all of your questions, we will arrange for a follow up discussion or respond via email.

Questions Asked of the Supplied References

1. How long have you been a client of the Association Management Company?
2. How satisfied are you with their service on a scale of one to ten, with ten the highest?
3. Has your membership grown?
4. Has your meeting attendance increased?
5. Have your fundraising efforts been successful?
6. Is your website up-to-date and graphically appealing?
7. Are your publications on time with appropriate content?
8. Has the staff been competent?
9. Has the staff been accessible and responsive?
10. Has the staff been proactive rather than reactive?
11. Has the image of your organization been enhanced?
12. Are reports submitted on a timely basis?
13. Has your overall revenue increased?
14. Are financial reports and checks processed efficiently and accurately?
15. Have there been any additions to fees above and beyond what was expected?
16. What are the AMC’s strengths?
17. What are the AMC’s weaknesses?
18. Are you planning on seeking out any other management company proposals?
19. Would you recommend this firm?
20. Why? Other?