

Technology Assessment RFP

Questions and Answers

Dear Respondents,

Thank you for your interest in working with ICMA. We received a significant number of questions and expressions of interest in response to this RFP. To make the information easier to navigate, we synthesized the questions and organized them by topic in this Q&A document.

Where multiple respondents submitted substantially similar questions, we consolidated and paraphrased them and provided a single response. Accordingly, if you do not see your question reproduced verbatim, it may have been combined with questions from other respondents.

Some submitted questions are not addressed in this document because:

1. The requested information is intended to be developed or determined through this engagement; or
2. ICMA determined that the question was not sufficiently relevant to a respondent's ability to prepare a well-informed proposal; or
3. The question is addressed in the RFP, which respondents should review carefully.

We have sought to address as many relevant questions as possible, which accounts for the length of this document. Thank you again for your interest in partnering with ICMA. We look forward to receiving your proposals by the deadline of **11:59 pm Eastern Time, November 6, 2026**.

Thank you,

ICMA

Overall Scope, Priorities, and Outcomes

Question 1: Does the engagement end with an approved roadmap, or include procurement, implementation kick-off, or ongoing delivery oversight? Who approves the roadmap, and how many review rounds are expected?

Response: Please refer to the Scope of Services section of the RFP for the anticipated scope of the engagement and related deliverables. At this time, ICMA

has not determined what the roadmap review process will entail, including the number of review rounds. Final approval of the roadmap will be provided by ICMA management.

Question 2: What technology initiatives does ICMA anticipate pursuing over the next 12–24 months, which are the highest priorities for procurement or implementation, and are any key system contracts—such as the AMS, LMS, website, or e-commerce platforms—scheduled for renewal during that period? Should the selected consultant anticipate supporting more than one workstream concurrently?

Response: ICMA expects the selected consultant to focus initially on the technology assessment and development of the roadmap. In parallel, ICMA must begin implementing a technology platform for its **member credentialing program**, a known priority targeted for delivery in June or July 2027. The selected consultant will be expected to support this initiative, as described in Sections 3 and 4 of the RFP’s Scope of Services. Additional projects and workstreams will be identified through the roadmap, with their timing, budgets, sequencing, and resource requirements informed by the assessment findings and recommendations.

Question 3: Are the listed initiatives the complete scope of the technology strategy, or is the consultant expected to identify and assess additional initiatives across ICMA?

Response: ICMA is a midsize international professional association with a diverse portfolio of programs, services, business lines, and revenue streams supported by multiple technology platforms and applications. The RFP identifies the most significant categories of systems and applications currently in use; however, the list is not exhaustive, and no systems have been excluded from the assessment. ICMA will rely on the selected consultant to recommend priorities and identify opportunities that offer the greatest value relative to cost and effort. The overall goal is to create a more cohesive technology environment that supports stronger decision-making and improved business outcomes.

Question 4: Are there contract renewals, expirations, or committed launch dates we should consider? If so, please identify the systems or initiatives involved and the relevant dates.

Response: Most of ICMA’s current technology contracts have terms of one to three years and expire at different times. A more detailed inventory of current contracts and expiration dates will be shared with shortlisted consultants during the next stage of the solicitation process. At this time, the only committed implementation is a technology platform for ICMA’s member credentialing program. This

implementation is part of a broader overhaul of the credentialing program and is a known priority, with a target rollout in June or July 2027.

Question 5: Who will sponsor and coordinate the engagement on ICMA's side, and what staff availability should respondents assume for discovery, review, and decision-making?

Response: This engagement is a significant organizational priority and will be sponsored and coordinated by ICMA's Chief Financial Officer. ICMA anticipates forming a core project team comprising of several key staff members, including representatives from IT and other business teams, who will participate in discovery, review, and decision-making as needed to support a meaningful and effective engagement.

Question 6: How many departments and key stakeholders should we meet with during the discovery process? Are there any additional teams excluding the executive leadership, IT staff, and other business teams?

Response: ICMA envisions that the selected consultant will meet with representatives from each business team or functional areas that relies significantly on technology in its operations. Respondents should anticipate engaging with approximately six to eight teams. These discussions should help the consultant understand current business processes, existing technology capabilities and limitations, unmet needs, and what is and is not working effectively. Because this phase of the engagement is primarily inward-looking and staff-focused, ICMA does not currently anticipate participation by individuals outside the organization's staff.

Question 7: What are ICMA's expectations for on-site participation in Washington, DC, including which activities should be conducted in person, the anticipated number or frequency of visits, whether remote participation is acceptable, and whether travel expenses will be reimbursed?

Response: ICMA may require finalists to participate in on-site interviews during the selection process. After a consultant is selected and the contract is signed, ICMA does not currently anticipate requiring on-site participation; however, the need for in-person support may arise during the engagement, and respondents should be prepared to accommodate such requests. If on-site participation is required, reimbursement of reasonable travel expenses may be negotiated as part of the engagement.

Current Environment and Assessment Approach

Question 8: For each core business function—association management, learning management, website content management, e-commerce, events, credentialing, publications, fundraising, accounting, marketing automation, reporting, and Microsoft 365—which platform does ICMA currently use? Can ICMA share the specific products and vendors supporting its AMS, LMS, website, e-commerce, fundraising, and integrations?

Response: Detailed information regarding the platforms, products, vendors, and integrations currently in use will be provided to shortlisted respondents during the next stage of the RFP process.

Question 9: For the future technology architecture, how detailed should our recommendation be?

Response: The deliverables should provide sufficient detail to be meaningful and actionable, including clear recommendations, priorities, sequencing, potential timelines, estimated cost levels, dependencies, and implementation considerations. Respondents should describe in their proposals the level of detail and supporting information that ICMA can expect from them. A sample of comparable deliverables prepared for another association would also be helpful.

Question 10: Will ICMA provide agreed-upon business needs, or should we conduct additional meetings with its teams to gather and confirm detailed requirements? Is ICMA expecting a review based on stakeholder discussions and existing documentation, or hands-on technical validation through system access, configuration reviews, integration testing, and data analysis?

Response: As part of Section 1 of the RFP's Scope of Services, the selected consultant will be expected to work with ICMA staff to gather, validate, and document detailed business needs and requirements. Where necessary to complete the required deliverables, ICMA will provide the selected consultant with appropriate read-only access to relevant systems, documentation, data, and other information.

Question 11: Which systems are vendor-hosted SaaS, custom-built, self-hosted, or on-premises?

Response: ICMA's systems are primarily cloud-based software-as-a-service (SaaS) solutions.

Question 12: What documentation will ICMA make available for the assessment—including systems inventories, architecture and integration diagrams, process maps, prior technology or security assessments, and strategic plans—and, where documentation is missing or requires updating, to what extent will the selected consultant be expected to create or enhance it?

Response: ICMA will provide shortlisted respondents with an inventory of existing systems and integrations, as well as ICMA’s recently adopted Strategic Roadmap. The selected consultant will be expected to undertake the work necessary to complete the deliverables outlined in the RFP, including creating or enhancing documentation where needed to support those deliverables.

Question 13: Do you have any stakeholder or end-user research about the current experience (user surveys, accessibility audits, other)? What existing assessments, technology plans, or documented business requirements will be available for the selected firm to build upon?

Response: ICMA has existing stakeholder research, assessments, and requirements that will be available to the selected firm. Website research includes surveys, stakeholder feedback, analytics, and content assessments, although this work was not comprehensive. A more comprehensive assessment of ICMA’s AMS was conducted more than two years ago and will also be made available. In addition, ICMA has documented requirements for several initiatives and will provide its Strategic Roadmap and an inventory of existing systems and integrations. The selected firm will be expected to validate existing findings and conduct additional discovery as appropriate.

Question 14: What security, privacy, regulatory, contractual, compliance, and data-storage requirements must ICMA’s current systems and future technology solutions meet, including standards such as PCI DSS, GDPR, and any other requirements applicable to ICMA’s international members or customers?

Response: ICMA requires current and future technology solutions to meet applicable security, privacy, regulatory, and contractual requirements, including PCI DSS for payment-card systems, GDPR where applicable to international members and customers, and relevant U.S. state privacy laws. Solutions must also comply with ICMA’s internal information-security and risk-management requirements, including appropriate access controls, encryption, vulnerability management, audit logging, incident response, business continuity, and secure data retention and deletion.

Vendors must appropriately protect ICMA and member data and disclose where data is stored and processed, applicable subprocessors, retention practices, breach-notification procedures, and any secondary use of ICMA data. ICMA should retain ownership and the ability to export and securely delete its data when a service ends. Higher-risk systems should provide appropriate independent security assurance, such as SOC 2 Type II, ISO 27001, PCI DSS compliance, or equivalent evidence, based on the system and data involved.

ICMA's public-facing websites and web applications should meet recognized accessibility standards to ensure they can be used by people with disabilities. **ICMA should require conformance with WCAG 2.1 Level AA or higher**, including support for keyboard navigation, screen readers, accessible forms, adequate color contrast, captions/alternative text, and responsive/mobile use. Accessibility should be incorporated into design and development and validated through automated and manual testing, with independent accessibility testing for higher-impact systems.

Procurement and Implementation Support

Question 15: The RFP mentioned that the selected firm prepare specifications and bid documents for future system procurements. Which future system procurements is ICMA considering?

Response: Future system procurements will be identified and prioritized based on the findings and recommendations of the technology assessment and roadmap.

Question 16: For future procurements, should the selected consultant prepare complete RFPs and evaluation criteria, or review and contribute to materials developed by ICMA?

Response: ICMA will rely on the selected consultant to provide the support necessary to help ICMA procure the appropriate systems and achieve successful implementations. In particular, ICMA expects to draw on the consultant's expertise in gathering and documenting detailed requirements, developing the overall scope of work for each RFP, and establishing evaluation criteria. The consultant will work closely with the appropriate ICMA staff, including representatives of the business teams most directly involved in or benefiting from the system, IT staff, and contracting personnel.

Question 17: Approximately how many proposals, demonstrations, and contracts should the consultant expect to review for each procurement?

Response: ICMA's procurement policies emphasize competition as a means of achieving best value. For large procurements, ICMA requires at least three proposals; however, based on our experience with technology procurements, we may receive more. The actual number of proposals, demonstrations, and contracts requiring review will depend on the specific procurement. ICMA will rely on the selected consultant's expertise to help manage the process effectively.

Question 18: Should the consultant provide evaluation findings only, or also recommend a preferred vendor and support pricing and contract negotiations?

Response: The support expected from the selected consultant is described in Parts 3 and 4 of the RFP's Scope of Services. ICMA welcomes the consultant's recommendations, including a recommendation regarding the preferred vendor. Please note: ICMA intends to engage a truly independent advisor who is free from actual or perceived conflicts of interest and is not an implementer or reseller of any specific technology under consideration.

Question 19: How will responsibilities for contract review be divided between ICMA's legal team and the selected consultant, particularly regarding legal terms, scope, deliverables, service commitments, and delivery risks?

Response: ICMA will rely on the selected consultant to help ensure that the contract accurately reflects the technical requirements, scope of services, deliverables, pricing, service commitments, and other relevant project terms. ICMA will also rely on the consultant's expertise to help ensure that provisions addressing technology, implementation, performance, and delivery risks are consistent with industry standards. ICMA's finance and contracting staff will review the contract for overall appropriateness. Finally, ICMA's legal counsel may review applicable legal terms.

Question 20: Which current or planned technology initiatives will require the consultant to serve as ICMA's owner's representative or provide owner-side project management during vendor-led implementations?

Response: ICMA anticipates that the selected consultant will serve as ICMA's owner's representative and provide owner-side project management for any future significant technology implementations, including vendor-led implementations. Although a vendor may assign its own project manager, that individual represents the vendor's interests. ICMA believes it is valuable to have a project manager who represents ICMA's interests, holds the vendor accountable, coordinates ICMA staff, and helps keep each implementation on schedule, within scope, and within budget.

The first such engagement is expected to be the implementation of a new technology platform for ICMA's member credentialing program. Subsequent initiatives will be identified through the current-state assessment and the development of the technology strategy and roadmap.

Question 21: What duration and approximate weekly level of effort should the consultant anticipate for procurement and implementation support?

Response: ICMA cannot determine the anticipated duration or weekly level of effort at this time. These requirements will depend on the nature, scope, and complexity of the specific system being procured and implemented.

Question 22: At what point should the consultant's involvement conclude: vendor selection, contract execution, implementation completion, or transition to ICMA's operational team?

Response: With respect to specific implementation projects, ICMA anticipates that the selected consultant will remain engaged through implementation and the transition of the system into operation to help ensure a successful outcome. For additional detail regarding the anticipated support, please refer to Parts 3 and 4 of the RFP's Scope of Services.

AI, Data, Security, and Governance

Question 23: Regarding AI, is ICMA primarily seeking an assessment and strategic recommendations, or should proposals contemplate the development of AI governance frameworks, policies, adoption planning, and staff enablement?

Response: All of the above. ICMA expects proposals to address the assessment and strategic recommendations, as well as the development or refinement of AI governance frameworks and policies, adoption planning, and staff enablement.

Question 24: The RFP mentions that various AI tools are used by ICMA employees – Copilot, ChatGPT, Claude, etc. Are these tools licensed to each ICMA employee? If not, what are the restrictions on employees leveraging AI tools (shadow IT)?

Response: Currently, Microsoft Copilot is the only AI tool explicitly approved for use by all ICMA staff, and each employee has a Copilot license. The use of other tools, including ChatGPT and Claude, is not formally authorized. However, there is growing interest in determining how they may be used appropriately for ICMA work,

particularly where certain tools are perceived as offering capabilities that may be better suited to specific needs. ICMA is specifically exploring options for implementing Claude in a secure and appropriately governed manner.

Question 25: Is there a specific incident, audit finding, or strategic initiative driving the timing of this assessment?

Response: No specific incident, audit finding, or strategic initiative is driving the timing of this assessment. Rather, ICMA sees an opportunity to leverage AI more effectively while ensuring that employees use it responsibly and that associated security concerns are appropriately addressed. The rapid evolution of AI technology, coupled with staff's increasing adoption of these tools in their day-to-day work, has created a sense of urgency. ICMA intends to take a proactive approach to establishing appropriate governance, safeguards, and practices.

Question 26: What are the primary data assets in scope, for example member data, program data, or research, and where does data primarily live today (Microsoft 365, AMS/Salesforce, data warehouse)? This will let us scope the data-readiness review precisely.

Response: ICMA has multiple data sources, and its data resides across multiple systems, some of which are connected and others that are not. Data ownership is also distributed across the organization. As part of the engagement, the selected consultant will be expected to help determine which data should be in scope for the AI-related portion of the RFP and recommend how that data can be used most effectively and appropriately.

Question 27: Should our assessment rely on staff discussions and existing documents, or include checking actual data, files, and system settings?

Response: The appropriate scope and approach will be determined following the initial discovery phase. ICMA expects the assessment methodology to incorporate staff discussions, existing documentation, and targeted examination of systems, configurations, data, and files where appropriate. Respondents should propose the level of technical validation necessary to confirm key findings while minimizing unnecessary access to sensitive or confidential information.

Question 28: Are any AI policies or guidelines in place or in development?

Response: ICMA's AI Usage Guidelines are currently under development. The selected consultant will be expected to review the draft guidelines for alignment with leading practices and recommend and complete any necessary revisions.

Schedule and Milestones

Question 29: What is the desired timeframe for completing the initial assessment and technology roadmap following the anticipated January 2027 award?

Response: Once the contract is executed, ICMA would like to begin the assessment and roadmap development promptly. ICMA's annual budget is adopted in June for the fiscal year beginning July 1. If feasible, ICMA would like to have sufficiently reliable estimates of anticipated FY 2028 technology investments available in the spring to inform the budget process. However, ICMA's priority is to conduct a thorough and effective assessment rather than accelerate the work at the expense of quality. If the assessment requires additional time and cannot align fully with the budget timeline, ICMA will work with the selected consultant to address the timing and planning implications.

Question 30: If ongoing PMO services are anticipated, what is the expected duration of that engagement?

Response: The initial assessment and roadmap development are expected to have defined beginning and end dates. However, the duration and timing of subsequent phases and activities, including ongoing PMO services, cannot be determined at this time because those activities will be informed by the findings of the assessment and the resulting roadmap. ICMA is seeking a partner that can help the organization achieve its technology objectives over an extended period. Accordingly, ICMA views this engagement as a potential long-term partnership rather than a discrete, one-time project.

Budget and Pricing

Question 31: Is there a budget range or not-to-exceed for (a) assessment, strategy and roadmap and (b) procurement support and owner-side project management?

Response: ICMA does not have a budget range to share for the initial assessment, development of the technology roadmap, or any other component of the Scope of Services. Respondents should use their experience and expertise to propose an appropriate pricing structure for the various activities outlined in the Scope of Services. ICMA is open to any reasonable approach, including fixed fees, hourly rates, retainers, separate task orders, or a combination of these methods. ICMA recognizes that precise estimates may be difficult for certain components at this stage. Respondents should therefore provide, to the best of their ability and based

on their understanding of the engagement, proposed fees or rates, pricing options, and the assumptions underlying their estimates.

Question 32: Phased engagement: Would ICMA consider a fixed-fee initial assessment and roadmap, with subsequent procurement support and owner-side project management authorized and priced through separate task orders?

Response: Yes. ICMA will consider this approach, along with any other reasonable approaches proposed by respondents.

Submission Requirements and Process

Question 33: Is there a required or preferred file format (for example, a single PDF)? May the fee proposal and required forms be submitted as separate attachments in the same email?

Response: Yes. The fee proposal and required forms may be submitted as separate attachments in the same email.

Question 34: Do the eight-page limit requirements apply to fee tables, redacted sample deliverables, references, and required forms, or may these materials be included separately as appendices or exhibits?

Response: These materials may be included separately as appendices or exhibits.

Question 35: What time and time zone apply to the November 6 closing date?

Response: Proposals are due by 11:59 p.m. Eastern Time on Friday, November 6, 2026.

Question 36: Do we need to complete all three forms linked through the provided QR code before submitting our RFP responses?

Response: No. The forms do not need to be completed at the proposal stage. They may be completed after the firm or firms have been selected.

Question 37: If finalists are invited to present, when does ICMA expect those presentations to take place? Will ICMA share its standard contract terms and insurance requirements before the award?

Response: Finalist presentations are tentatively expected to take place in December 2026. If the timeline changes for any reason, ICMA will notify respondents with as much advance notice as possible. ICMA's standard contract

terms and insurance requirements will be shared with finalists before an award is made.

Question: Does ICMA permit a brief introductory and clarification meeting through the designated procurement contacts? We would welcome the opportunity to introduce our team and better understand your priorities, subject to your established process for respondent communications.

Response: ICMA will not hold introductory meetings with prospective respondents before the proposal submission deadline. ICMA will review all proposals received by the November 6, 2026 deadline, identify a shortlist of viable respondents, and invite those respondents to participate in subsequent meetings.

Qualifications and References

Question 38: If a firm provides managed IT, security, implementation, or related services, may it participate in this engagement and later bid on a procurement for which it helped develop requirements or otherwise provided advisory support? If so, what safeguards would ICMA require to address actual or perceived conflicts of interest and prevent an unfair competitive advantage?

Response: ICMA is seeking an independent and unbiased partner to support all activities identified in the Scope of Services. ICMA intends to engage a firm whose advice and recommendations are guided solely by ICMA's needs and best interests, rather than a consultant that could influence requirements, procurement decisions, or vendor selection in a manner that benefits its own implementation or service business, or steer ICMA toward a vendor or system for which the firm serves as a reseller or implementation partner. Firms are strongly encouraged to evaluate any actual or perceived conflicts of interest arising from their business model, affiliations, or anticipated downstream opportunities before deciding whether to submit a proposal.

Question 39: May respondents include relevant engagements completed by proposed personnel before joining or establishing the responding firm, provided their individual roles and responsibilities are clearly identified?

Response: The purpose of requesting relevant engagements and references is to evaluate each respondent's demonstrated experience assisting organizations similar to ICMA with work comparable to the Scope of Services. Respondents may

include relevant engagements completed by proposed personnel before they joined or established the responding firm, provided their individual roles and responsibilities are clearly identified. However, ICMA will consider the extent to which the firm's qualifications depend on the continued involvement of those individuals, as their departure could materially affect the firm's ability to provide the relevant experience and expertise. Proposals relying on such experience should clearly explain how the firm will ensure continuity and maintain the required capabilities throughout the engagement.

Question 40: The RFP frames respondents as firms (firm overview, transmittal letter signed by an officer of the firm). Could you confirm whether an independent consultant (an individual) is eligible to respond and complete the required vendor forms?

Response: ICMA has not ruled out any potential respondents at this time. Independent consultants are eligible to submit a proposal; however, an individual respondent's capacity to perform the full scope of work may be a consideration. Independent consultants should address this concern in their proposals, including how they will ensure sufficient capacity and expertise to complete all required work.

Question 41: Company profile and relevant experience carries 30 points. Could you clarify what counts as relevant experience here: AI-governance work, association/nonprofit technology strategy, or general IT assessment?

Response: Relevant experience includes experience performing all of the activities outlined in the Scope of Services section of the RFP.

Question 42: The RFP emphasizes experience advising associations, professional societies, and nonprofit membership organizations. Would ICMA consider closely comparable technology assessment and modernization work for mission-driven nonprofits and public-sector organizations where the engagement covers cross-functional operations, data/reporting, integrations, governance, and implementation planning?

Response: ICMA's goal is to engage a technology partner that understands the technology needs of an organization similar to ICMA—a midsize association with a complex business model, a diverse membership and customer base, and a broad range of products and services. The relevance of respondents' prior experience will be evaluated through this lens, including the extent to which their experience demonstrates an understanding of comparable organizational complexity, operating environments, and technology needs.

Contracting and Partner Structure

Question 43: Does ICMA prefer to engage a single firm for all components of the RFP, or may separate components be awarded to different firms?

Response: ICMA's preference is to engage a single firm for the full scope of the RFP; however, ICMA remains open to awarding separate components to different firms if doing so best meets the organization's needs.

Question 44: If ICMA awards to more than one firm, may a respondent propose on only some workstreams, such as AI governance and data readiness?

Response: Yes. Respondents may propose on the workstreams they believe best align with their capabilities and approach.

Question 45: Does ICMA anticipate the selected consultant serving as the owner's representative for one future implementation project, or for multiple technology initiatives over the life of the engagement?

Response: ICMA is seeking a trusted partner to help the organization step back, assess its overall technology architecture and needs, develop a strategic roadmap, and support implementation of that roadmap. The anticipated scope is broader than oversight of a single system implementation project and may encompass multiple technology initiatives.

Question 46: The RFP notes that ICMA may select one firm or more than one firm. We intend to propose an approach in which our firm serves as the lead firm and overall project manager for the engagement, bringing in specialized firms with whom we have an established working relationship to provide expertise in advanced e-commerce, accessibility, and information security. Is ICMA open to a single lead firm proposing this kind of team? If so, are there any requirements for how partner firms should be identified in the proposal, such as named firms, roles, or references? We want to ensure that we structure our response, and the inclusion of any partner firm information, in accordance with the 8-page limit you've outlined in the RFP.

Response: ICMA has not ruled out any potential team or partner structure, including a lead firm supported by specialized partner firms, provided the proposed structure is clearly and transparently identified in the proposal and does not create any actual or potential conflicts of interest. Respondents should identify the firms involved and describe their respective roles and responsibilities. The eight-page limit applies to all proposals.