



Management Search Process Steps

- Complete an organizational assessment
 - Validate need for AMC search
 - Provide in-depth information for RFP
- Receive board authorization for the search
 - Appoint search committee
- Create a search committee
 - Include up to five members (not all current board members, but at least two; ideal size is five; current president or chairman can be ex-officio)
 - Respect all opinions
- Search committee sets preliminary criteria
Criteria may include the following:
 - Number of employees
 - Number of clients
 - Type of organizations managed
 - Size of organizations managed – number of members and annual revenue
 - Geographic scope of organizations managed – int'l, national, regional, state, local
 - Length of time in business
 - Location of AMC
 - Accreditation
 - Certifications held by employees
 - Additional criteria
- Prioritize criteria in order of importance and ranking
- Utilize AMCI online RFP process to distribute RFP (allow a minimum of 4 weeks for responses)
- Evaluate responses using a criteria grid
- Utilizing independent rankings, select 3 or 4 finalists to be interviewed by search committee at a neutral location
- Discuss independent rankings and determine the top candidate
- Determine a back-up candidate
- Recommend candidate to the Board of Directors with a given rationale
- Allow top candidate(s) to make a presentation (may be done in person or virtually)
- Possibly let runner up also make presentation

Make sure to report all steps of the process to the Board of Directors along the way for transparency. Also, make sure to keep all AMCs fully informed of the process and their standing in a timely manner.