

AMERICAN ASSOCIATION OF MEDICAL ASSISTANTS REQUEST FOR PROPOSALS: FRACTIONAL CHIEF INFORMATION OFFICER (CIO) SERVICES

DATE: October 1, 2026

TO: Interested Consulting Firms and Independent Consultants

FROM: American Association of Medical Assistants (AAMA)

RE: Fractional Chief Information Officer (CIO) Services

Response Deadline: October 23, 2026

Overview

The American Association of Medical Assistants (AAMA) is seeking proposals from qualified consulting firms and independent consultants to serve as a part-time, Fractional CIO to provide strategic technology leadership and hands-on IT governance support to the organization.

AAMA recently completed a comprehensive technology assessment that evaluated its Association Management System (AMS), broader technology ecosystem, cybersecurity posture, and IT staffing model. The assessment identified the need for senior-level technology leadership to help AAMA establish a formal IT department structure, close cybersecurity gaps, help the organization establish a long-term technology strategy, and build the foundation required to support that strategy.

AAMA currently has 20 staff. The organization currently relies on a single, long-standing, part-time IT consultant who has supported all AAMA technology (desktops, network, Azure, AMS configuration, website, cybersecurity, and vendor management).

The Fractional CIO will report to AAMA's Executive Director and will work closely with department leadership across the organization.

About AAMA: Mission

Established in 1956, the American Association of Medical Assistants is the oldest and largest professional association devoted exclusively to the medical assisting profession in the United States. AAMA administers the Certified Medical Assistant (CMA (AAMA)) credential, advocates for scope-of-practice protections, and provides continuing education and professional resources to its members.

AAMA operates as a national membership association with a network of affiliated state societies and local chapters. The organization is headquartered in Chicago, Illinois.

Project Background

AAMA's core AMS, Aptify, has been in place for approximately 22 years and reflects significant accumulated customization. A recent independent technology assessment surfaced several recurring themes that the fractional CIO is intended to address:

- Formalize IT processes such as establishing a formal process for logging IT requests, evaluating new technology needs, or approving and prioritizing IT projects.
- Development of formal written IT and cybersecurity policies such as: Data backup and recovery plan, password management, plan, acceptable use policy, data security policy, disaster recovery policy, cybersecurity policy with incident response plan, etc.
- AAMA would like to develop a multi-year technology plan aligned with its strategic plan.
- Facilitate the selection of a Managed Services Provider (MSP) to manage and administer AAMA infrastructure, access control, hardware acquisition and configuration, possibly cybersecurity training, etc.
- Develop a position description to hire a new Business Analyst position focusing on bridging the gap between technical and functional capabilities in AAMA systems.

AAMA's Executive Director is committed to building a stronger, more sustainable technology foundation for the organization moving forward. The Fractional CIO engaged through this RFP will play a central role in that effort.

Scope of Services

The successful respondent will be expected to provide the following services, at minimum:

Strategic Leadership & Governance

- Provide part-time, ongoing strategic oversight of AAMA's technology systems, contractors, and vendors.
- Develop a 3- to 5-year technology plan aligned with AAMA's organizational strategic plan.
- Review current AMS and IT vendor contracts, including renewal, termination, and notice terms, to inform future planning.
- Work closely with the Executive Director, prepare and present regular reports on technology initiatives, priorities, and risks to the Executive Director and, as needed, the Board.

Policy Development & Cybersecurity

- Develop, document, and support core IT policies, including data backup and recovery, password management, acceptable use, data security, disaster recovery, and cybersecurity/incident response.
- Support AAMA in resolving outstanding cyber insurance items and maintaining appropriate coverage going forward.
- Coordinate an internal and external network penetration test and oversee remediation of identified gaps.

IT Department Structure & Staffing

- Develop a position description for a new Business Analyst role to bridge technical and functional needs across AAMA's systems and support the hiring process.
- Lead a selection process for a Managed Services Provider (MSP) to support networking, access control, and hardware management.
- Formalize processes for logging IT requests (hardware and software).
- Formalize a process for requesting software enhancements and prioritizing the active project list.

- Develop an IT budget.
- Work with the MSP to formalize a hardware replacement plan.
- Establish and facilitate recurring cross-departmental technology meetings covering open IT issues, improvement opportunities, and future requirements gathering.
- Serve as escalation point for day-to-day issues not resolved by IT support resources.

Vendor & Project Oversight

- Serve as a liaison between AAMA, its current IT consultant, its AMS vendor, and other technology vendors during the transition to a more formal IT structure.
- Provide oversight and prioritization guidance for active and upcoming technology projects.
- Advise AAMA on readiness for a future, formal AMS selection process.

Core Competencies & Essential Skills

- Demonstrated success serving as a full-time, Fractional or Interim CIO for trade or professional membership associations of similar size and organizational complexity.
- Proven experience establishing IT governance and formal department structure within organizations that previously lacked dedicated internal technology leadership.
- Experience developing and implementing IT policies, cybersecurity programs, and incident response plans.
- Strong communication skills, with the ability to work effectively and diplomatically across staff, and executive leadership.
- Experience with association management systems; familiarity with Aptify is a plus but not required.
- Experience selecting and managing Managed Services Provider relationships.
- Ability to work independently, manage multiple concurrent priorities, and communicate effectively with a diverse group of staff and vendors.

Qualifications

- 8+ years' experience serving associations, membership organizations, or other nonprofit organizations.
- 10+ years serving in an IT leadership position (IT director/CIO level)
- Demonstrated experience developing cybersecurity policy and managing vendor/contractor relationships.
- References from comparable engagements, particularly with trade or professional associations.

Engagement Structure & Time Commitment

AAMA anticipates this will be a part-time, ongoing engagement. Respondents should propose a recommended level of engagement (e.g., estimated hours per month) based on the scope described above.

Budget

To be established. Respondents should propose a pricing structure (e.g., hourly, monthly retainer, or fixed fee) along with an estimated monthly or annual investment based on their recommended level of engagement.

Proposal Submission Requirements

Interested firms and consultants should submit a proposal that includes the following:

- Firm or consultant overview, including relevant experience with trade or professional associations.
- Proposed approach and methodology for the scope of services described above.
- Profile(s) of the individual(s) who would serve as AAMA's Fractional CIO, including relevant credentials and experience.
- Proposed level of engagement (estimated hours per month) and pricing structure.
- At least three professional references from comparable engagements.

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- Relevant experience with associations or membership-based nonprofit organizations of comparable size and complexity.
- Demonstrated ability to establish IT governance, policy, and cybersecurity programs.
- Qualifications and experience of the proposed team.
- Clarity and feasibility of the proposed approach.
- Overall value and transparency of proposed pricing.
- Strength of references.

References

AAMA will request and check references for finalist firms or consultants.

Submission Instructions

Proposals should be submitted electronically no later than October 23 to:

Annie Storey, Executive Director

Email: astorey@aama-ntl.org

Phone: (312) 424-3101

Questions regarding this RFP should be directed, in writing to the contact above. AAMA reserves the right not to make an award based on this RFP, and to modify the scope, timeline, or process at its discretion.