ASSOCIATION RFP BACKGROUND INFORMATION

When your association issues an RFP for AMC services, be prepared to supply detailed information about your organization and its operations. This form shows the kind of information an AMC is likely to request from you.

### GENERAL INFORMATION

<table>
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<tr>
<th>Association Name:</th>
<th>Acronym:</th>
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<tr>
<td>Contact Person:</td>
<td>Title:</td>
</tr>
<tr>
<td>Address:</td>
<td>City/State/Zip:</td>
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<td>Telephone:</td>
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### ORGANIZATION

1. Primary geographic scope of your association?
   - [ ] International
   - [ ] National
   - [ ] Regional
   - [ ] State
   - [ ] Local

2. Primary industry or profession served by your association?
   ________________________________________________________________

3. Primary type of membership in your association?
   - [ ] Companies/Institutions
   - [ ] Individuals
   - [ ] Both

4. IRS tax status of your association?
   - [ ] 501(c)(3)
   - [ ] 501(c)(6)
   - [ ] Other: __________________________________________________

### MEMBERSHIP

1. Total number of current members? _____________________________

2. Number of potential members? ________________________________

3. Does your association have chapters?  
   - [ ] Yes
   - [ ] No
   - If “yes,” number of chapters: ________________________________

4. Classes of membership in association:

<table>
<thead>
<tr>
<th>Category/Description</th>
<th>Number of Members</th>
<th>Voting</th>
<th>Nonvoting</th>
<th>Annual Dues Rate Per Category</th>
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### BOARD OF DIRECTORS

1. Number of members on board of directors? __________________

2. Number of board meetings each year?
   - In person: __________________
   - By teleconference: ___________
   - Number of days per meeting: __________________

3. Does your association have an executive committee?
   - [ ] Yes
   - [ ] No
   - If “yes,” number of executive committee meetings each year?
   - In person: __________________
   - By teleconference: ___________
   - Number of days per meeting: __________________

### FINANCIAL MANAGEMENT

1. Association’s current budget:
   - Total annual revenues? $________________________
   - Total expenses? $________________________

2. Month in which fiscal year begins? ______________________________

3. Amount of fund balance at end of last fiscal year?  
   $________________________

4. How often are association’s financial statements prepared?  
   __________________________________________________________
SERVICES, PROGRAMS, AND ACTIVITIES
Which current services, programs, and activities are offered to association’s membership? (Use additional sheets if necessary.)

☐ Statistical Reporting  ☐ Standardization  ☐ Continuing Education  ☐ Long-Range Planning
☐ Marketing Research  ☐ Marketing Promotion/Advertising  ☐ Training  ☐ Technical
☐ Group Insurance  ☐ Testing & Certification  ☐ Public Relations  ☐ Education
☐ Chapter Programs/Assistance  ☐ Government Relations  ☐ Credit/Collection  ☐ Surveys
☐ Standardization  ☐ Marketing Promotion/Advertising  ☐ Testing & Certification  ☐ Other (please describe):
☐ Government Relations  ☐ Credit/Collection  

LOBBYING
1. Does association regularly retain or employ a lobbyist?  ☐ Yes  ☐ No
   If “yes,” what is the scope of lobbying activities?

2. Is association currently being managed by an association management company?  ☐ Yes  ☐ No
   If “yes,” how many years has association been managed by the company? ________________________________

3. Is the company aware of the search?  ☐ Yes  ☐ No

4. If association is not being managed by an association management company, does it currently have a management staff and a headquarters?  ☐ Yes  ☐ No

5. Has a request for proposal (RFP) been developed for this search?  ☐ Yes  ☐ No

6. If “yes,” what is the deadline to respond to the RFP?

7. What is the anticipated start date for the new association management company?

8. Your preferred method of contact?  ☐ Telephone  ☐ Fax  ☐ Email
   ☐ Other (please specify): ________________________________

MEETINGS, CONFERENCES, AND TRADESHOWS
1. Please list all meetings, conferences, and tradeshows produced by/for association each year:

<table>
<thead>
<tr>
<th>Type of Event</th>
<th>No. of Meetings Per Year</th>
<th>City/Cities Where Event Last Held</th>
<th>No. of Days Per Event</th>
<th>Total Attendance</th>
<th>No. of Sessions</th>
<th>No. of Exhibitors</th>
<th>Total Net Square Feet of Exhibit Space</th>
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2. Does association typically attend meetings, conferences, or shows other than those it produces?  ☐ Yes  ☐ No
   If “yes,” please explain why:

______________________________________________________________
______________________________________________________________
______________________________________________________________
______________________________________________________________

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## COMMUNICATIONS

1. **Does association produce a newsletter?**
   - □ Yes  □ No
   - If “yes”:
     - a. How often is it published? ________________________________
     - b. Number of pages? ________________________________
     - c. Does it carry advertising?  □ Yes  □ No

2. **Does association produce a magazine or newspaper?**
   - □ Yes  □ No
   - If “yes”:
     - a. How often is it published? ________________________________
     - b. Number of pages? ________________________________
     - c. Does it carry advertising?  □ Yes  □ No

3. **Does association produce a membership directory or roster?**
   - □ Yes  □ No
   - If “yes”:
     - a. How often is it published? ________________________________
     - b. Number of pages? ________________________________
     - c. Does it carry advertising? □ Yes  □ No
     - d. What other information does it contain? ________________________________

4. **Approximately how many times a year are bulletins or other mailings sent to members?**
   - ________________________________
   - **Explain, if necessary:** ________________________________

5. **Who is responsible for producing the publications?**
   - □ Outside contractor  □ Members  □ Staff  □ Combination: ________________________________

6. **Who is responsible for producing the membership directory?**
   - □ Outside contractor  □ Members  □ Staff  □ Combination: ________________________________

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### REQUIRED MATERIALS

- Please attach a copy of the following items:
  - ▪ List of officers and directors
  - ▪ Mission statement or purpose of the association
  - ▪ Current financial statement
  - ▪ Financial statement of last full year
  - ▪ Board meeting minutes from the past one to three years

### REQUESTED MATERIALS

The following items are also requested:

- ▪ Magazine
- ▪ Newsletter
- ▪ Newspaper
- ▪ Membership application
- ▪ Membership directory
- ▪ Roster of present management
- ▪ Annual meeting promotional brochure
- ▪ Tradeshow promotional brochure