

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

Association Name:		Acronym:
Contact Person:		Title:
Address:		City/State/Zip:
Telephone:	Fax:	Email:

ORGANIZATION

<p>1. Primary geographic scope of your association? <input type="checkbox"/> International <input type="checkbox"/> National <input type="checkbox"/> Regional <input type="checkbox"/> State <input type="checkbox"/> Local</p> <p>2. Primary industry or profession served by your association? _____</p>	<p>3. Primary type of membership in your association? <input type="checkbox"/> Companies/Institutions <input type="checkbox"/> Individuals <input type="checkbox"/> Both</p> <p>4. IRS tax status of your association? <input type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c)(6) <input type="checkbox"/> Other: _____</p>
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MEMBERSHIP

<p>1. Total number of current members? _____</p> <p>2. Number of potential members? _____</p>	<p>3. Does your association have chapters? <input type="checkbox"/> Yes <input type="checkbox"/> No If "yes," number of chapters: _____</p>
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4. Classes of membership in association:

Category/Description	Number of Members	Voting	Nonvoting	Annual Dues Rate Per Category
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	

BOARD OF DIRECTORS

<p>1. Number of members on board of directors? _____</p> <p>2. Number of board meetings each year? a. In person: _____ Number of days per meeting: _____ b. By teleconference: _____</p>	<p>3. Does your association have an executive committee? <input type="checkbox"/> Yes <input type="checkbox"/> No If "yes," number of executive committee meetings each year? a. In person: _____ Number of days per meeting: _____ b. By teleconference: _____</p>
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FINANCIAL MANAGEMENT

<p>1. Association's current budget: Total annual revenues? \$ _____ Total expenses? \$ _____</p> <p>2. Month in which fiscal year begins? _____</p>	<p>3. Amount of fund balance at end of last fiscal year? \$ _____</p> <p>4. How often are association's financial statements prepared? _____</p>
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SERVICES, PROGRAMS, AND ACTIVITIES

Which current services, programs, and activities are offered to association's membership? (Use additional sheets if necessary.)

- | | | | |
|--|--|---|---|
| <input type="checkbox"/> Statistical Reporting | <input type="checkbox"/> Standardization | <input type="checkbox"/> Continuing Education | <input type="checkbox"/> Long-Range Planning |
| <input type="checkbox"/> Marketing Research | <input type="checkbox"/> Marketing Promotion/
Advertising | <input type="checkbox"/> Credits | <input type="checkbox"/> Technical |
| <input type="checkbox"/> Group Insurance | <input type="checkbox"/> Testing & Certification | <input type="checkbox"/> Training | <input type="checkbox"/> Education |
| <input type="checkbox"/> Chapter Programs/
Assistance | <input type="checkbox"/> Government Relations | <input type="checkbox"/> Public Relations | <input type="checkbox"/> Surveys |
| | | <input type="checkbox"/> Credit/Collection | <input type="checkbox"/> Other (please describe):

_____ |

LOBBYING

1. Does association regularly retain or employ a lobbyist?
 Yes No

If "yes," what is the scope of lobbying activities?

MANAGEMENT STAFF

1. Is association currently being managed by an association management company?
 Yes No
 If "yes," how many years has association been managed by the company? _____

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

2. Is the company aware of the search?
 Yes No

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

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

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

4. If "yes," is the current management staff aware of the search for new management?
 Yes No

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

MEETINGS, CONFERENCES, AND TRADESHOWS

1. Please list all meetings, conferences, and tradeshow produced by/for association each year:

Type of Event	No. of Meetings Per Year	City/Cities Where Event Last Held	No. of Days Per Event	Total Attendance	No. of Sessions	No. of Exhibitors	Total Net Square Feet of Exhibit Space

2. Does association typically attend meetings, conferences, or shows other than those it produces?
 Yes No

If "yes," please explain why: _____

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: _____

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 brochure
- Membership directory
- Roster of present management
- Annual meeting promotional brochure
- Tradeshow promotional brochure