

ASSOCIATION RFP BACKGROUND INFORMATION

DATE: _____

GENERAL INFORMATION				
Association Name: _____			Acronym: _____	
Contact Person: _____			Title: _____	
Address: _____			(City/State/Zip): _____	
Telephone: _____	Fax: _____		E-mail: _____	
ORGANIZATION				
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		3. Primary type of membership in your association? <input type="checkbox"/> Companies/Institutions <input type="checkbox"/> Individuals <input type="checkbox"/> Both		
2. Primary industry or profession served by association? _____		4. IRS tax status of your association? <input type="checkbox"/> 501(c)3 <input type="checkbox"/> 501(c)6 <input type="checkbox"/> Other: _____		
MEMBERSHIP				
1. Total number of current members? _____ 2. Number of potential members? _____		3. Does your association have chapters? <input type="checkbox"/> Yes <input type="checkbox"/> No. If "yes," number of chapters: _____		
4. Classes of membership in association:				
Category/Description	Number of Members	Voting	Non-voting	Annual Dues Rate Per Category
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
BOARD OF DIRECTORS				
1. Number of members on board of directors? _____ 2. Number of board meetings each year? a. In person: _____ Number of days per meeting: _____ b. By teleconference: _____		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: _____		
FINANCIAL MANAGEMENT				
1. Association's current budgeted: Total annual revenues? \$ _____ Total expenses? \$ _____		3. Amount of fund balance at end of last fiscal year? \$ _____		
2. Month in which fiscal year begins? _____		4. How often are association's financial statements prepared? _____		

(2/98)

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

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? _____

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

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

4. If "yes," is the current management staff aware of the search for new management? 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 E-mail
 Other (please specify): _____

MEETINGS, CONFERENCES, AND TRADE SHOWS

1. Please list all meetings, conferences, and trade shows 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 many 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:

- | | |
|--|--|
| <ul style="list-style-type: none"> • List of officers and directors • Mission statement or purpose of the association • Current financial statement | <ul style="list-style-type: none"> • Financial statement of last full year • Board meeting minutes from the past 1-3 years |
|--|--|

REQUESTED MATERIALS

1. The following items are also requested:

- | | | |
|---|---|--|
| <ul style="list-style-type: none"> • Magazine • Newsletter • Newspaper | <ul style="list-style-type: none"> • Membership application • Membership brochure • Membership directory | <ul style="list-style-type: none"> • Roster of present management • Annual meeting promotional brochure • Trade show promotional brochure |
|---|---|--|