



**RFP FOR  
ASSOCIATION MANAGEMENT SERVICES**

**Association Name:**

**HISTORY OF ASSOCIATION**

*A brief history of the association.*

**MISSION, VISION, STRATEGIC PLAN**

*Attach most recent strategic plan, if available.*

**CURRENT MANAGEMENT STRUCTURE**

1. What is your current management structure?

2. If managed by an AMC, which one?

3. How many years does the association have with its current management?

4. What prompted the search?

5. Has current management been notified of the search?

6. Will current management submit a proposal to continue services?

7. How many hours per month for personnel to manage the association?

8. What is your current budget for management services?

**SUMMARY OF ASSOCIATION STATUS / CONCERNS**

*Could include comments on financial stability, membership growth, pending litigation, defining mission and long-range planning, add a certification/accreditation program, governmental and legislative issues, etc.*

**TYPES OF MEMBERS**

*Include whether membership is by company or individual; classifications of membership; number of members; benefits; renewal policies*

## DESCRIPTION OF LEADERSHIP STRUCTURE

*Board of Directors, Committees – Terms and Responsibilities*

## DESCRIPTION OF MEETINGS

*Number, purpose, and frequency of meetings; meeting attendance records; any existing contracts; if exhibits are involved; attach meeting brochure(s), if any*

## DESCRIPTION OF PUBLICATIONS

*Frequency of publication; circulation; writers and editors; fulfillment programs; advertising solicitation*

## SUMMARY OF CONTRACTS

*Examples: Publications, office lease, equipment leases*

## SCOPE OF SERVICES

*Check all that apply*

### Association Management Services

1. General Office
  - a. Phone (hours)
  - b. Fax
  - c. Voice Mail
  - d. Email
2. Board Meetings
  - a. Frequency
    1. In person meetings
    2. Conference call meetings
  - b. Location(s)
  - c. Responsibility of taking minutes
3. Committee Meetings
  - a. Frequency
    1. In person meetings (staff attendance required)
    2. Conference call meetings
  - b. Location(s)
4. Management Company Facilities

- a. Storage requirements
  - b. Meeting space
- 5. Inventory/Online Sales Products
- 6. Financial Management
  - a. Frequency of reports
  - b. Income and expense responsibility
  - c. Budget preparation
  - d. Investments
  - e. Deposit/Credit card processing
- 7. Membership Support Services
  - a. Database
  - b. Renewal cycle
  - c. Membership directory
    - 1. How often it is published
    - 2. Electronic version
    - 3. Number of pages
    - 4. Does it carry advertising
    - 5. Who is responsible for producing
  - d. Mailing new membership packets
- 8. Publication Support Services
  - a. Frequency of publications
    - 1. Electronic version
    - 2. Number of pages
    - 3. Does it carry advertising
    - 4. Who is responsible for producing
- 9. Website
  - a. Developing and designing web site content and pages
  - b. Maintaining and updating general pages
  - c. Overseeing web site enhancements / improvements
  - d. Building event sites and online registration
  - e. Forum/blog management
- 10. Social Media
  - a. Content management
  - b. Coordinator
  - c. Developing strategy
  - d. Analytics
- 11. Other Support Services

## **Events/Conference/Trade Show Management**

- 1. Frequency
  - a. Locations(s)
  - b. Type of event
  - c. Numbers of days per event
  - d. Total attendance
  - e. Number of sessions
  - f. Onsite staff required
- 2. Site Selection
- 3. Contract Negotiation
- 4. F & B Selection
- 5. Budget Development and Financial Management
- 6. Registration Processing
- 7. Develop Conference Timetable
- 8. Brochure Development
- 9. Marketing and Promotion
  - a. Mobile and web-based event apps
- 10. Continuing Education Credits (CEU's)
- 11. Certification
- 12. Awards
- 13. Exhibits Management
- 14. Sponsor Management

## APPENDIX

In addition, the following documents can be emailed to [eric@imigroup.org](mailto:eric@imigroup.org)

- Recent financial statements, including a current balance sheet **REQUIRED**
- Current bylaws and any proposed changes
- Recent year-end financial reports, audits, and federal & state tax returns
- Current operating budget
- Meeting, membership or other association brochures
- Journal or other publications

## CONTACT INFORMATION

For questions regarding this RFP, please contact:

Contact Name

Contact's Position with the Association

Address

City State Zip

Phone

Email

**ADD DATES BELOW:**

## TIMELINE

The following timeline will apply to this process:

Final receipt of all proposals date

Initial screening of proposals by search committee

Due diligence by various members of the search committee on proposals taken to the next level

Presentation of one or more proposals to the Board of Directors

Selection and negotiation of contact specifics

Transition process

Formal start date

If the timeline changes, the Search Committee will keep you apprised.