

Request for Proposal Template

Save this document to your computer. Once you've added your information and deleted all of the red explanatory text, save it as "Your Association" RFP.

Instructions and suggestions to you have been placed in RED. These can be deleted once you've finished inputting your information into the document. Information that you will need to input or modify has been placed in BLUE. Keep in mind that if your association has a professional website that contains some of this information, you can just put the website address beneath the appropriate section.

YOUR ASSOCIATION NAME

RFP FOR ASSOCIATION MANAGEMENT SERVICES

HISTORY OF ASSOCIATION

A brief history of the association, its past management, and how its services are perceived.

Enter your text here

MISSION, VISION, STRATEGIC PLAN

Attach most recent strategic plan, if available.

Enter your text here

RELATIONSHIP TO OTHER RELATED ORGANIZATIONS

Relationship to competing organizations; If a national or international organization, describe relationship to regional, state, provincial, or local groups. And vice versa, if a regional chapter of a larger national or international organization, describe your relationship to this larger entity.

Enter your text here

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.

Enter your text here

TYPES OF MEMBERS

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

Enter your text here

DESCRIPTION OF LEADERSHIP STRUCTURE

Board of Directors, Committees – Terms and Responsibilities

Enter your text here

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

Enter your text here

DESCRIPTION OF PUBLICATIONS

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

Enter your text here

SUMMARY OF CONTRACTS

Examples: Publications, office lease, equipment leases

Enter your text here

SCOPE OF SERVICES

Services listed below are just suggestions. Add/Delete as needed.

Association Management

1. General Office
 - a. Phone (hours)
 - b. Fax
 - c. Voice Mail
 - d. Email
2. Management Company Facilities
 - a. Storage requirements
 - b. Meeting space
3. Board and Committee Support
 - a. Meeting Logistics
 - b. Frequency
 - c. Location
 - d. Responsibility of creating agendas, taking minutes, etc.
4. Financial Management
 - a. Frequency of reports
 - b. Income and expense responsibility
 - c. Budget preparation
 - d. Investments
 - e. Credit card processing
5. Membership Support Services
 - a. Database
 - b. Renewal cycle
 - c. Membership directory
 - d. Inventory Management
6. Marketing and Communications Support Services
 - a. Type of support required
 - b. Frequency of publications
 - c. Web Services
7. Conference and Event Management
 - a. Site Selection
 - b. Contract Negotiation
 - c. Develop Conference Timetable
 - d. Conference Resume
 - e. Onsite Staff
 - f. Brochure Development
 - g. Marketing and Promotion

- h. Budget Development and Financial Management
- i. Registration Processing
- j. VIP Management
- k. F & B Selection
- l. Exhibits Management
- 8. Technology Support Services
 - a. Software/hardware requirements
 - b. Association Management System or database support
 - c. Website development

APPENDIX

- *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*

Use the text above or add your text here

INFORMATION REQUESTED OF THE ASSOCIATION MANAGEMENT COMPANY

The following information will be useful for your Search Committee to know about the AMCs that are submitting proposals.

Use the text below or add your text here

1. A description of how your association management company is organized to serve its clients.
2. An indication of your ability to provide support for each aspect of the Scope of Services section above. Also indicate services that you typically outsource.
3. An explanation of the company's experience in related industries or areas of concern.
4. A clear explanation of how your firm charges for its services and how these expenses will fit into our budget.
5. The qualifications and responsibilities of the account executive who will serve our association.
6. A description of how your association management company will meet the immediate challenges and fulfill the future goals of our association.
7. A specific transition schedule.
8. Costs for the transition activities.
9. A representative client list and references.
10. Financial references.

TIMELINE

As indicated in the Association Profile Form, the following timeline will apply to this process:

Final receipt of all proposals date	INSERT DATE
Initial screening of proposals by search committee	INSERT DATE
Due diligence by various members of the search committee on proposals taken to the next level	INSERT DATE
Presentation of one or more proposals to the Board of Directors	INSERT DATE
Selection and negotiation of contact specifics	INSERT DATE
Transition process	INSERT DATE
Formal start date	INSERT DATE

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

CONTACT INFORMATION

For questions regarding this RFP, please contact:

Name
Address
City State Zip
Phone
Email