



**Association Management Services**  
**Request for Proposal (SAMPLE)**

**Association Name:**

Year Established:

Association Mission:

Association Vision:

**Membership Type (individual, company, groups or state agencies):**

Number of Members:

**Number of Board Members:**

Number of Board Meetings Annually:

**Financial:**

Annual Operating Income:

Annual Operating Expenses:

**Current Association Management Company (AMC):**

Preferred location(s) for AMC office:

Does your current AMC know you're seeking proposals from other AMC's?

Will your current AMC be submitting a proposal?

Why are you conducting a RFP? Is there a specific issue or concern you are trying to address with this potential change?

Explain what you're looking for in a new AMC:

How many existing full and part time AMC staff work on behalf of your association:

**Meetings and Conferences:**

Number of Conferences Annually:

Average Number of Attendees per Conference:

Average Number of Exhibitors per Conference:

Number and Type of Other Educational Events Annually:

## Publications:

Description and Frequency of Publications:

**List any existing subcontractors, such as meeting planners, lobbyists, newsletter editors etc.**

### Scope of Services:

*Check all services you would like provided by your AMC.*

- General office** – dedicated phone line, fax, mail processing.

### Board of Directors Meetings

- Attendance at board meetings
  - In person
  - Via telephone
- Taking and producing board meeting minutes

### Committee Support

*Please indicate number of committees and number of meetings annually.*

- Schedule committee meetings
- Attend committee meetings
  - In person
  - Via telephone
- Preparation and dissemination of board meeting agendas/materials
- Take and prepare minutes of committee meetings

### Financial Management

- General bookkeeping
- Processing of accounts payable and receivable
- Follow-up on accounts receivable
- Recommend and manage investments
- Preparation and dissemination of financial reports
- Budget preparation

### Membership

- Database management
- Renewal processing
- New member packets
- Membership directory
- Recruitment

### Conference/Trade Show Management

- Site selection
- Contract negotiation
- Marketing and promotion
- Speaker management
- Confirmations
- Travel/hotel arrangements
- Presentation coordination
- Budget preparation

- Registration management
- On-site staffing
- Exhibitor management
- Food & beverage management

**Other Services**

*Please list any services requested and not already outlined above.*

**Additional Information**

*Including copies of any of the following documents that will assist responding AMCs to better understand your organization.*

- Current bylaws
- Recent financial statements
- Current operating budget
- Most recent strategic plan

**Timeline**

Proposals due by \_\_\_\_\_  
Initial screening of proposals by search committee completed by \_\_\_\_\_  
AMCs selected to move to next round by \_\_\_\_\_  
Presentation of proposals to the Board of Directors \_\_\_\_\_  
Selection and negotiation of contract specifics \_\_\_\_\_  
Transition start date \_\_\_\_\_  
Formal start date \_\_\_\_\_

**Contact Information**

For questions regarding this RFP, please contact:

Name \_\_\_\_\_  
Position with organization \_\_\_\_\_  
Address \_\_\_\_\_  
City State Zip \_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_

Pertinent Information About the Association	Answers to Help AMC Assess Compatibility
How long has the association been in business?	
What is the annual operating budget?	
Preference of locations for AMC office?	
How many members does the association have? Are the individuals, companies, groups, state agencies, etc...	
What is the purpose for the search?	Price comparison, Exec Leaving, Association Relocation, Downsizing, Changing from Full Time Employees to Contract
Is the current AMC aware that an RFP is being distributed?	
Will your current AMC be submitting a proposal?	
How many full time and part time staff/contractors work in your association?	
How many consultants or vendors does the organization have?	
What services do they provide?	graphic design, mtg planning, IT, website, newsletter editing, lobbyist, communication or pr consultants?
How many events does the association hold annually?	
What is the average attendance for regular meetings and how many attend the annual event?	