



1229 Greenwood Cliff, Suite 340
 PO Box 34155
 Charlotte, NC 28234-4155
 704-365-3622
 www.AssociationOffices.com

Association Management &
 Meeting Planning Services

Association Profile Form

Please complete this Association Profile Form and return it with the support materials requested on page 2. A sample list of information to include in your required Scope of Services is listed on page 3. (We recognize that it may be difficult to secure all the information requested. Please provide as much as possible.) Please be sure to fill in a specific due date that will allow our members a minimum of 30 days to respond.

Name of Organization _____ Acronym _____
 Year Established _____ IRS Classification _____ Fiscal Year _____
 Annual Budget – Revenues: _____ Expenses: _____ Equity: _____
 Types of Organization: Trade Professional Society Foundation
 Scope of Organization: Local State Regional National International
 Number of Chapters/Regional Groups Under This Organization _____

RFP Due Date: _____ Hire Date: _____

Contact: _____ Association Website: _____
 Address: _____
 Phone: _____ Fax: _____ Email: _____

Current Management

Currently Managed By _____ City/State _____
 Current Management Notified? Yes No Board Authorized the Search? Yes No
 Has RFP Been Developed? Yes No (If yes, please attach)

Total Present Membership?:

Number of Potential Members?:

Membership Type	#	Dues Amount

Committee/Board Support

Frequency of Board Meetings _____ Number of Board Members _____ Number of Active Committees _____



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Membership Meetings/Conferences

Location	Dates	Attendance	Fees	Exhibits Included?

Communications

Publications	Frequency	Format (Fax, Electronic, Printed)

Guidelines for a Request for Proposal (RFP)

Please provide as much of the following information as possible to insure a complete and comprehensive response to your request for a proposal.

1. History of organization (age - incorporation date and location, membership size)
2. Mission Statement
3. Strategic Plan including organization’s Goals and Objectives
4. Leadership Organization Chart (board/committee structure)
5. Audit Report and recent Financial Statements
6. Bylaws
7. Copies of Publications (membership brochure, newsletter, journal, directory)
8. Copy of Conference/Trade Show/Membership Meetings Brochures
9. Calendar of Scheduled Organization Events
10. Scope of Services Required (Sample outline attached)
11. Membership Structure (dues levels, description of membership types, special services)
12. Association Website Information
13. Special Affiliated Organizations (chapters, regional, national)



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RFP - Scope of Services for Association Management

Your organization's Scope of Services document should include a comprehensive list of the services you wish handled by your administrative office. Below is a sample outline for your consideration. Please keep in mind that the list below is a list of *SUGGESTED INFORMATION*. Your requirements may be very different.

Association Management

1. General Office
 - a. Phone (hours)
 - b. Fax
 - c. Voice Mail
 - d. Email
2. Board Meetings
 - a. Frequency
 - b. Location
 - c. Responsibility of taking minutes
3. Management Company Facilities
 - a. Storage requirements
 - b. Meeting space
4. Inventory
5. Financial Management
 - a. Frequency of reports
 - b. Income and expense responsibility
 - c. Budget preparation
 - d. Investments
 - e. Credit card processing
6. Membership Committee Support Services
 - a. Database
 - b. Renewal cycle (calendar year, anniversary date, other)
 - c. Membership directory
7. Publication/Communication Support Services
 - a. Type of support required
 - b. Frequency of publications
 - c. Web Services
8. Other Committee Support Services
9. Special Travel / Training (annual meetings with affiliated groups)

Conference/Trade Show/Membership Meeting Management

1. Site Selection
2. Contract Negotiation
3. Develop Conference Timetable
4. Conference Resume
5. Onsite Staff
6. Brochure Development
7. Marketing and Promotion
8. Budget Development and Financial Management
9. Registration Processing
10. VIP Management
11. F & B Selection
12. Exhibits Management