



# AMR

ASSOCIATION MANAGEMENT RESOURCES

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ANN ARBOR | LANSING, MICHIGAN

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PROVIDING SOLUTIONS THAT WORK

## ASSOCIATION MANAGEMENT AND EVENT SERVICES

A Guide for the Development of a

### **REQUEST FOR PROPOSAL (RFP)**

*for Association Management and Event Services  
from Association Management Resources (AMR)*

This guide was developed by Association Management Resources  
Livonia and Okemos, Michigan

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## ORGANIZATION AND CONTACT PERSON:

Organization Name: \_\_\_\_\_

Acronym: \_\_\_\_\_

Address 1: \_\_\_\_\_

Address 2: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Telephone: (    ) \_\_\_\_\_ Fax: (    ) \_\_\_\_\_

Association Website Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Title: \_\_\_\_\_

Telephone: (    ) \_\_\_\_\_ Email: \_\_\_\_\_

*(Provide the following information if different than above)*

Address 1: \_\_\_\_\_

Address 2: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Telephone: (    ) \_\_\_\_\_ Fax: (    ) \_\_\_\_\_

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## DELIVERY OF PROPOSAL:

Intention to Bid Deadline: \_\_\_\_\_  
*Month Day Year*

Proposal Submission Deadline: \_\_\_\_\_  
*Month Day Year*

Proposal Delivery Options *(Check those acceptable):*

U.S. Postal Service

United Parcel Service

FedEx

Fax

Email

Other: \_\_\_\_\_

Number of proposal copies required: \_\_\_\_\_

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## SPECIFIC SERVICES BEING REQUESTED (Check all that apply):

- |  |   |
|--|---|
| <input type="checkbox"/> Board of Directors/Administration | <input type="checkbox"/> Government Relations/PAC     |
| <input type="checkbox"/> Financial Management              | <input type="checkbox"/> Accreditation                |
| <input type="checkbox"/> Membership                        | <input type="checkbox"/> Certification                |
| <input type="checkbox"/> Publications                      | <input type="checkbox"/> Benefit Programs for Members |
| <input type="checkbox"/> Meetings and Conventions          | <input type="checkbox"/> Website Services             |
| <input type="checkbox"/> Exhibits/Trade Show               | <input type="checkbox"/> Social Media                 |
| <input type="checkbox"/> Education and Training            | <input type="checkbox"/> Other Services: _____        |
| <input type="checkbox"/> Public Relations                  |   |

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## CURRENT MANAGEMENT SERVICES:

Who are you currently managed by? \_\_\_\_\_

Will current management service provider be submitting a proposal?  Yes  No

Number of years with current management company: \_\_\_\_\_

Current staff allocated to group: \_\_\_\_\_

What has prompted your search? \_\_\_\_\_

When do you expect a final decision to be made (date): \_\_\_\_\_

What is the expected start date: \_\_\_\_\_

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## OFFICE

Does your organization maintain a single central office address or do you have multiple office addresses?  Single  Multiple

Please explain: \_\_\_\_\_

Is there a specific geographic location which would be advantageous to your organization as far as office location is concerned?  Yes  No

Please explain: \_\_\_\_\_

Would meetings of the Executive Board, Officers, and/or Committees be held at the Office?  Yes  No

How many meetings per year? \_\_\_\_\_

Maximum number of people in each meeting? \_\_\_\_\_

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## OFFICE *(continued)*

Does your organization require active and dead storage of files and other organization materials?  Yes  No

Approximately how many 4-drawer vertical active files? \_\_\_\_\_

Approximately how many cubic feet of dead storage? \_\_\_\_\_

Please list any special equipment or software the organization owns at the present time that relates to the above services: \_\_\_\_\_

\_\_\_\_\_

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## COMMUNICATIONS

What type of communications are currently used by your organization?

Telephone

Telephone message system (voice mail, answering machine)

Fax (individual)

Fax (broadcast)

Email

Other: \_\_\_\_\_

Is an 800 telephone number used by your organization?  Yes  No

Approximately how many incoming telephone calls are currently being received by your organization's office on a daily basis? \_\_\_\_\_

Approximately how many individual pieces of mail are currently being received by your organization on a daily/monthly basis? \_\_\_\_\_

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## BOARD OF DIRECTORS/ADMINISTRATION

Number of Board or Executive Committee meetings held per year:

In person: \_\_\_\_\_ Number of days per meeting \_\_\_\_\_

Via conference call: \_\_\_\_\_

Does your association have an executive committee?  Yes  No

If "yes," number of executive committee meetings per year? \_\_\_\_\_

In person: \_\_\_\_\_ Number of days per meeting \_\_\_\_\_

Via conference call: \_\_\_\_\_

How many of the meetings will the management services company you employ attend? \_\_\_\_\_

Year in which your most recent Strategic Plan was developed: \_\_\_\_\_

If your organization does not have a Strategic Plan, is it your Board's intention to develop one under new management?  Yes  No

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## FINANCIAL INFORMATION

Type of organization:

- Trade Association
- Professional Society
- Foundation
- Other: \_\_\_\_\_

What year was your organization established? \_\_\_\_\_

What is the IRS designation for your organization:  501(c)(3)  501(c)(6)  Other: \_\_\_\_\_

Accounting method used:  Cash  Accrual

Accounting software used: \_\_\_\_\_

Number of accounts to be reconciled each month: \_\_\_\_\_

Is your organization up-to-date/reconciled with current bank statements?  Yes  No

Number of checks written per month: \_\_\_\_\_

Does your organization operate on a calendar year?  Yes  No

If no, when does the fiscal year begin? \_\_\_\_\_

Is your organization incorporated?  Yes  No

If yes, what state? \_\_\_\_\_

Will the management company have authority to sign checks?  Yes  No

If no, who will the check signing authority be handled by? \_\_\_\_\_

Have all appropriate IRS returns and government operating reports been filed to date?  Yes  No

Does the organization invest excess funds?  Yes  No

Does your organization accept payment by credit card?  Yes  No

Indicate which credit cards are accepted:  Visa  MasterCard  American Express

Discover  Other: \_\_\_\_\_

Association's current budget: \$ \_\_\_\_\_

Total annual revenues? \$ \_\_\_\_\_

Total expenses? \$ \_\_\_\_\_

Amount of fund balance at the end of last fiscal year? \$ \_\_\_\_\_

Please check the specific financial services being requested by your organization:

- Establish and monitor checking account(s)

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## FINANCIAL INFORMATION *(continued)*

- Establish and monitor savings account(s)
- Establish and monitor investment account(s)
- Establish and maintain payable and receivable accounts
- Coordinate IRS returns with CPA firm
- Assist organization leadership with budget planning
- Submit financial reports:  monthly  quarterly  annually  Other: \_\_\_\_\_

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## MEMBERSHIP INFORMATION

Membership history for past 3 years:  Increasing  Decreasing  Consistent

Number of current members: \_\_\_\_\_

Number of potential members: \_\_\_\_\_

How many classes of Membership? \_\_\_\_\_

Does your Association have chapters?  Yes  No

If yes, number of chapters: \_\_\_\_\_

If yes, do the chapters have a separate dues structure?  Yes  No

Are members billed annually at the start of the fiscal year or on member anniversary date?

Annually  Member Anniversary Date  Other: \_\_\_\_\_

What software is your organization currently using for its membership database? \_\_\_\_\_

\_\_\_\_\_

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## PUBLICATIONS

Please check all of the publications produced by your organization:

- |  |                             |                             |  |
|--|-----------------------------|-----------------------------|--|
| <input type="checkbox"/> Newsletter                            | # of pages: _____           | Produced _____ times a year | <input type="checkbox"/> Print <input type="checkbox"/> Digital Only |
| <input type="checkbox"/> Journal                               | # of pages: _____           | Produced _____ times a year | <input type="checkbox"/> Print <input type="checkbox"/> Digital Only |
| <input type="checkbox"/> Membership Directory                  | # of pages: _____           | Produced _____ times a year | <input type="checkbox"/> Print <input type="checkbox"/> Digital Only |
| <input type="checkbox"/> Annual Report                         | # of pages: _____           | Produced _____ times a year | <input type="checkbox"/> Print <input type="checkbox"/> Digital Only |
| <input type="checkbox"/> Event Brochures                       | # of pages: _____           | Produced _____ times a year | <input type="checkbox"/> Print <input type="checkbox"/> Digital Only |
| <input type="checkbox"/> Conference Programs                   | # of pages: _____           | Produced _____ times a year | <input type="checkbox"/> Print <input type="checkbox"/> Digital Only |
| <input type="checkbox"/> Registration Brochures                | # of pages: _____           | Produced _____ times a year | <input type="checkbox"/> Print <input type="checkbox"/> Digital Only |
| <input type="checkbox"/> Exhibitor Prospectus                  | # of pages: _____           | Produced _____ times a year | <input type="checkbox"/> Print <input type="checkbox"/> Digital Only |
| <input type="checkbox"/> Postcards                             | _____                       | Produced _____ times a year | <input type="checkbox"/> Print <input type="checkbox"/> Digital Only |
| <input type="checkbox"/> e-News                                | Produced _____ times a year |                             |  |
| <input type="checkbox"/> Training Materials - Please describe: | _____                       |                             |  |
| <input type="checkbox"/> Other - Please describe:              | _____                       |                             |  |



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## MEETINGS AND CONVENTIONS *(continued)*

Please check the meeting and convention services being requested by your organization:

- Event sponsorship solicitation
  - Event marketing
  - Meeting planning with committee or organization officer
  - Meeting set-up and coordination
  - Meeting attendance and participation
  - Event Program Development
  - Pre-registration services
  - On-site registration services
  - Collection of fees and/or payment for service vendors
  - Publication of meeting/convention programs, proceedings, etc. *(Please list under publication section)*
  - Other: \_\_\_\_\_
- 

## EXHIBITS/TRADE SHOWS

Are exhibits or trade shows held in conjunction with meetings or conventions?  Yes  No

If yes, please list the meetings/conventions and provide the information requested:

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Meeting

_____	_____	_____	_____
Size of Booths	# of Booths	Booth Fee	Month Held

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Meeting

_____	_____	_____	_____
Size of Booths	# of Booths	Booth Fee	Month Held

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Meeting

_____	_____	_____	_____
Size of Booths	# of Booths	Booth Fee	Month Held

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Meeting

_____	_____	_____	_____
Size of Booths	# of Booths	Booth Fee	Month Held

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Please check the specific exhibit/trade show services being requested by your organization:

- Exhibit/trade show planning and operation
- Exhibit/trade show promotion
- Sale of exhibit space
- Financial planning and reporting
- Other: \_\_\_\_\_



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## EDUCATION AND TRAINING

Does your organization sponsor any education or training programs?  Yes  No

If yes, please list each program and provide the information requested:

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Program

_____	_____	_____	_____
Program Hours	Times Held Annually	# Attending Annually	Individual Fee
Certifying agency if applicable _____			

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Program

_____	_____	_____	_____
Program Hours	Times Held Annually	# Attending Annually	Individual Fee
Certifying agency if applicable _____			

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Program

_____	_____	_____	_____
Program Hours	Times Held Annually	# Attending Annually	Individual Fee
Certifying agency if applicable _____			

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Program

_____	_____	_____	_____
Program Hours	Times Held Annually	# Attending Annually	Individual Fee
Certifying agency if applicable _____			

Please check the education and training services being requested by your organization:

- Planning and coordination of education and training
- Registration of participants
- Collection of program fees
- Attendance reports
- Financial Reports
- Professional development coordination/process approval
- Design and duplication of program materials
- Other: \_\_\_\_\_

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## PUBLIC RELATIONS

Describe the services that would need to be provided by the management company in support of the public relations program:

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## GOVERNMENT RELATIONS/PAC

Describe the services that need to be provided by the management company in support of the government relations/PAC programs:

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Will the management company be responsible for filing any required PAC reports?  Yes  No

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## ACCREDITATION

Services being requested by your organization:

- Administrative support (i.e., correspondence to schools, teams, etc.)
- Team Development
- Site Visit Scheduling with Team Assignments
- Advise on Policy and Standards
- Liaison with Federal Accrediting Recognition Agencies (i.e. Department of Education)
- Assist in formal review process (schedule hearings, organize/produce reports, etc.)
- Other: \_\_\_\_\_

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## CERTIFICATION

Services being requested by your organization:

- Administer Exam
- Database Tracking
- Renewal Processing
- Track CEU's
- Track PDU's
- Other: \_\_\_\_\_

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## BENEFIT PROGRAMS FOR MEMBERS

Describe support services to be provided by the management company for benefit programs:

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## WEBSITE SERVICES

Check any of the services being requested by your organization:

- New Website design
- Website hosting services
- Website creation (no Website currently exists)
- Website "reconstruction" (currently have a Website but would like it revised)
- Ability to accept on-line registrations (i.e., conference and membership)
- Ability to accept on-line credit card payments

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## WEBSITE SERVICES *(continued)*

- Ability to sell items on the Website (on-line store)
  - Weekly Website update/maintenance
  - Semi-monthly Website update/maintenance
  - Monthly Website update/maintenance
  - Website tracking (page hits, traffic, etc.)
  - Member-only access to portions of Website
  - Electronic Voting or surveying
  - ListServes: How many? \_\_\_\_\_
  - E-mail blasts: Approximately how many sent per year? \_\_\_\_\_
  - Other services: \_\_\_\_\_
- Do you have an existing website?  Yes  No URL: \_\_\_\_\_
- How was your website created?  CMS  HTML  Proprietary language?
- Please explain: \_\_\_\_\_
- Do you currently have a website host?  Yes  No Host Name: \_\_\_\_\_
- Do you currently use a 3rd party credit card processing company?  Yes  No
- Processing Company Name: \_\_\_\_\_

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## SOCIAL MEDIA

Services being requested by your organization:

- |                                    |  |  |                               |
|------------------------------------|--|--|-------------------------------|
| <input type="checkbox"/> Blogging: | <input type="checkbox"/> Create an account | <input type="checkbox"/> Maintenance of an account | <input type="checkbox"/> Both |
| <input type="checkbox"/> Facebook: | <input type="checkbox"/> Create an account | <input type="checkbox"/> Maintenance of an account | <input type="checkbox"/> Both |
| <input type="checkbox"/> Twitter:  | <input type="checkbox"/> Create an account | <input type="checkbox"/> Maintenance of an account | <input type="checkbox"/> Both |
| <input type="checkbox"/> LinkedIn: | <input type="checkbox"/> Create an account | <input type="checkbox"/> Maintenance of an account | <input type="checkbox"/> Both |
| <input type="checkbox"/> YouTube:  | <input type="checkbox"/> Create an account | <input type="checkbox"/> Maintenance of an account | <input type="checkbox"/> Both |
| <input type="checkbox"/> Other:    | _____                                      |  |                               |

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## OTHER SERVICES

Describe any other types of management services needed by the organization that are not included in the previous service categories:

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## PLEASE INCLUDE THE FOLLOWING WITH THIS RFP:

### REQUIRED MATERIALS

- Copy of current Strategic Plan
- List of officers and directors
- Mission statement or purpose of the association
- Current financial statement
- Financial statement of last full year
- Board meeting minutes from the past year

### REQUESTED MATERIALS

- Newsletter and/or magazine
- Membership application
- Membership brochure
- Annual meeting promotional materials
- Tradeshow promotional brochure and registration form