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:________________________________________________________ Fax:________________________ Email:________________________

Phone:________________________________________________________

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?: ______________________

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<th>Membership Type</th>
<th>#</th>
<th>Dues Amount</th>
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Committee/Board Support
Frequency of Board Meetings___________ Number of Board Members___________ Number of Active Committees___________
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)
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