***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. This can then be uploaded per the instructions on AMC Institute’s website here:* [*http://member.amcinstitute.org/select/rfp.cfm*](http://member.amcinstitute.org/select/rfp.cfm)*.*

*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; circulatio; 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. A more detailed list is available on the website here:* [*http://www.amcinstitute.org/select/sample\_rfp.cfm*](http://www.amcinstitute.org/select/sample_rfp.cfm)

**Association Management**

1. General Office
   1. Phone (hours)
   2. Fax
   3. Voice Mail
   4. Email
2. Board Meetings
   1. Frequency
   2. Location
   3. Responsibility of taking minutes
3. Management Company Facilities
   1. Storage requirements
   2. Meeting space
4. Inventory
5. Financial Management
   1. Frequency of reports
   2. Income and expense responsibility
   3. Budget preparation
   4. Investments
   5. Credit card processing
6. Membership Committee Support Services
   1. Database
   2. Renewal cycle
   3. Membership directory
7. Publication Committee Support Services
   1. Type of support required
   2. Frequency of publications
   3. Web Services
8. Other Committee Support Services

**Conference/Trade Show 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

**APPENDIX**

*In addition to the Association Profile Form (the electronic form on AMC Institute’s website), the following documents can be uploaded:*

* *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