

***California Society of Association Executives
Association Management Services
Request for Proposal
Template***

Association Name

**Request for Proposals
for
Association Management Services**

Association Mission:

Association Vision:

Membership Type (individual or company):

Number of Members:

Number of Board Members:

Number of Board Meetings Annually:

Annual Operating Income:

Annual Operating Expenses:

Current Association Management Company (AMC):

Does the current AMC know you're doing an RFP?

Will the current AMC be submitting a proposal?

Why are you conducting an 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.

Number of Conferences Annually:

Average Number of Attendees per Conference:

Average Number of Exhibitors per Conference:

Number and Type of Other Educational Events Annually:

Description and Frequency of Publications:

List any existing subcontractors, such as meeting planners or newsletter editors.

Scope of Services:

Check all services you would like provided by your AMC.

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

Board of Directors

- Attendance at board meetings
 - In person
 - Via telephone
- Taking and producing board meeting minutes
- Preparation and dissemination of board meeting agendas/materials

Committee Support

Please indicate number of committees and number of meetings annually.

- Schedule committee meetings
- Attend committee meetings
 - In person
 - Via telephone
- 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 the following will assist AMCs in better understanding 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: