



What to Include in a Request for Proposal

1. A brief history of the organization, its past management, and how its services are perceived.
2. The purpose of the association and its goals; a copy of your long-range plan, or an informal statement of your mission and goals.
3. A description of your group's current operating plan.
4. A summary of the group's particular concerns—for example, financial stability, membership growth, defining mission and long-range planning, governmental and legislative issues, or regulatory programs.
5. A description of your membership:
 - Whether it be corporate, individual, or a combination
 - Classifications of membership
 - Dues structure and amount(s), and renewal policies (i.e., anniversary or annual - if annual give the date)
6. A summary of benefits to both existing and future members.
7. A description of the leadership structure, including board positions and committees, along with their terms of office; and the staff services required by various committees.
8. A list of meetings held within a year:
 - A description of the annual meeting (conference, convention, trade show, number of attendees, registration fees, number of exhibits), date and location of most recent meeting and next meeting, and existing contracts for future meetings.
 - Comparative attendance and exhibit figures for three previous years
 - Board and committee meetings
 - Educational seminars (number of attendees, registration fees, date and location of most recent seminar and complete seminar schedule)
 - Exhibits (if they are stand-alone, give the square foot charge, the total square feet and size of booths)
 - Other regional or local meetings (describe these if the national organization is involved)



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9. A list of publications, including frequency of publication, circulation, writers and editors, fulfilment programs, and advertising solicitation.
10. A summary of contracts now in place for publications, office lease, equipment leases, auto leases, etc.
11. A description of any new services you will require beyond those presently provided.
12. If a national or international organization, describe your relationship to regional, state, provincial, or local groups.
13. If a state of regional chapter of national or international organization, describe your relationship to the larger organization.
14. Relationship to competing organizations.
15. The date that the management company should be prepared to assume responsibilities.
16. An inventory of office equipment and all fixed assets.
17. The preferred format for an RFP, if one exists.
18. Copies of the following documents:
 - Current bylaws and any proposed changes in bylaws
 - Any written policies and procedures
 - Publications and brochures, including a current roster
 - Recent financial statements, including a current balance sheet
 - Three most recent year-end financial reports, audits and Federal and State tax returns
 - Current operating budget and fiscal year
 - List of officers and phone numbers of those who may be contacted
19. Information on pending litigation.

(This document has been prepared using guidelines from the AMC Institute)