



ASSOCIATION MANAGEMENT **LTD.**

A Division of ISA Management Solutions, Inc.

Association Management, Ltd. – 1255 SW Prairie Trail Parkway, Ankeny, Iowa 50023
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Request for Proposal (RFP) Guidelines

Please provide as much of the following information as possible to ensure 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 - **Required**
6. Annual Budget
7. Bylaws
8. Articles of Incorporation
9. Most recent 990
10. IRS Application Form and Letter of Determination
11. Copies of Publications (newsletter, journal, directory)
12. Copy of Conference Brochures
14. Calendar of scheduled organization events
15. Scope of Services - **Required** (Sample outline attached)



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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
 - c. Membership directory
7. Publication Committee Support Services
 - a. Type of support required
 - b. Frequency of publications
 - c. 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