



**SERVICES, PROGRAMS, AND ACTIVITIES**

Which current services, programs, and activities are offered to association's membership (use additional sheets if necessary):

- |   |  |  |                                    |
|---|--|--|------------------------------------|
| <input type="checkbox"/> Statistical Reporting          | <input type="checkbox"/> Standardization                 | <input type="checkbox"/> Training            | <input type="checkbox"/> Technical |
| <input type="checkbox"/> Marketing Research             | <input type="checkbox"/> Marketing Promotion/Advertising | <input type="checkbox"/> Public Relations    | <input type="checkbox"/> Education |
| <input type="checkbox"/> Group Insurance                | <input type="checkbox"/> Testing & Certification         | <input type="checkbox"/> Credit/Collection   | <input type="checkbox"/> Surveys   |
| <input type="checkbox"/> Chapter Programs/Assistance    | <input type="checkbox"/> Government Relations            | <input type="checkbox"/> Long-range Planning |                                    |
| <input type="checkbox"/> Other (please describe): _____ | <input type="checkbox"/> Continuing Education Credits    |  |                                    |

**LOBBYING**

1. Does association regularly retain or employ a lobbyist?  
 Yes     No

If "yes," what is the scope of lobbying activities?

\_\_\_\_\_

**MANAGEMENT STAFF**

1. Is association currently being managed by an association management company?  
 Yes     No  
 If "yes," how many years has association been managed by the company? \_\_\_\_\_
2. Is the company aware of the search?  
 Yes     No
3. If association is not being managed by an association management company, does it currently have a management staff and a headquarters?  
 Yes     No

4. If "yes," is the current management staff aware of the search for new management?     Yes     No
5. Has a request for proposal (RFP) been developed for this search?     Yes     No
6. If "yes," what is the deadline to respond to the RFP?  
 \_\_\_\_\_
7. What is the anticipated start date for the new association management company? \_\_\_\_\_
8. Your preferred method of contact?  
 Telephone     Fax     E-mail  
 Other (please specify): \_\_\_\_\_

**MEETINGS, CONFERENCES, AND TRADE SHOWS**

1. Please list all meetings, conferences, and trade shows produced by/for association each year:

Type of Event	No. of Meetings Per Year	City/Cities Where Event Last Held	No. of Days Per Event	Total Attendance	No. of Sessions	No. of Exhibitors	Total Net Square Feet of Exhibit Space

2. Does association typically attend meetings, conferences, or shows other than those it produces?     Yes     No

If "yes," please explain why:

\_\_\_\_\_

**COMMUNICATIONS**

1. Does association produce a newsletter?  Yes  No  
If "yes":

- a. How often is it published? \_\_\_\_\_
- b. Number of pages? \_\_\_\_\_
- c. Does it carry advertising?  Yes  No

2. Does association produce a magazine or newspaper?  
 Yes  No

- If "yes":
- a. How often is it published? \_\_\_\_\_
  - b. Number of pages? \_\_\_\_\_
  - c. Does it carry advertising?  Yes  No

3. Does association produce a membership directory or roster?  Yes  No

- If "yes":
- a. How often is it published? \_\_\_\_\_
  - b. Number of many pages? \_\_\_\_\_
  - c. Does it carry advertising?  Yes  No
  - d. What other information does it contain?  
\_\_\_\_\_

4. Approximately how many times a year are bulletins or other mailings sent to members? \_\_\_\_\_

Explain, if necessary:  
\_\_\_\_\_

5. Who is responsible for producing the publications?

- Outside contractor  Members
- Staff  Combination: \_\_\_\_\_

6. Who is responsible for producing the membership directory?

- Outside contractor  Members
- Staff  Combination: \_\_\_\_\_

**REQUIRED MATERIALS**

Please attach a copy of the following items:

- List of officers and directors
- Mission statement or purpose of the association
- Current financial statement
- Financial statement of last full year
- Board meeting minutes from the past 1-3 years
- Current Bylaws

**REQUESTED MATERIALS**

1. The following items are also requested:

- Magazine
- Newsletter
- Newspaper
- Membership application
- Membership brochure
- Membership directory
- Roster of present management
- Annual meeting promotional brochure
- Trade show promotional brochure