REQUEST FOR PROPOSAL OUTLINE
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It is customary for an association to prepare a detailed Request for Proposal (RFP) to enable potential management to develop an appropriate estimate of costs. To assist, we've developed a general outline so that we may learn about your organization and the services it needs. Do not hesitate to ask about and provide details of services not outlined. The more information we have, the more comprehensive and accurate the resulting proposal.

Although the following outline may seem quite extensive, it actually represents a very broad picture of the most frequently requested services an association may want to purchase from a management company. Every association is different and not all categories will apply to every organization. I. - V. are at the heart of most contracts. VI. and VII. are necessary but for some groups, volunteers may continue to play very active roles with the role of management increasing over time. VIII – X may be added gradually.

Please note: There are no question marks since the entire outline seeks information.

I. Organization
    A. Corporate and tax status
    B. Year founded
    C. Mission statement
    D. Relationship with affiliates, parent association, special interest groups, regional divisions, etc.
    E. Membership
        1. Eligibility
        2. Geographic scope
        3. Composition - types of members (ex. individual, corporate/organizational; regular, associate/affiliate, student, retired, honorary, etc.)

II. Core Headquarter Services
    A. Communications - telephone calls, faxes, e-mail, regular mail, broadcasts, conference calls, on –line community, list serve
        1. Members' preferred means of contact
        2. Leaderships' preferred means of contact
        3. Anticipated volume
    B. Database
        1. Size - number of entries and fields/categories of information for those entries
        2. Scope - Who is included (members, prospective members, legislative and media contacts, affiliated industry groups, etc.)
        3. Policies/guidelines for maintenance (ex. purging of the database to control its active size)
        4. Specialized uses (ex. tracking member activity for certifications)
        5. Distribution of information, either print or electronic
        6. Member Directory (format, distribution)
        7. Policy for sales of mailing labels (to whom, cost, etc.)
        8. Anticipated number of sales in a year (if list is sold)
        9. Creation of special reports for the leadership (type, volume)

    C. Mailings
       Type and purpose, size of distribution
    D. Web site
      1. Domain address
      2. Webmaster – volunteer or professional
      3. Frequency of web site updates
      4. Commerce or other interactive features of web site

III. <u>Leadership</u> <u>and</u> <u>Its</u> <u>Support</u>
    A. Governance
      1. Number and type of elected and appointed leaders (Officers, Board of Directors, Committee chairs)
      2. Length of terms
      3. Nominations and election process
    B. Board meetings
      1. Frequency, length and location
      2. Materials to be prepared and distributed before, during, after (and by what method)
      3. Recording, preparation and distribution of minutes
    C. Committees
      1. Number and type
      2. Frequency of meeting (and method ex. in person, conference calls)
      3. Management involvement
    D. Award and scholarship programs
    E. Executive consulting
      1. Leadership development and succession planning
      2. Document preparation and filing
      3. New board member orientations
      4. Strategic planning
      5. Budgeting
      6. Crisis management
      7. Other

III. <u>Financial</u> <u>Services</u>
    A. Bookkeeping/record keeping requirements
    B. Banking needs
    C. Invoicing (not including membership dues)
    D. Availability of credit card processing (manual or on-line)
    E. Interaction with Treasurer
    F. Budget Process

IV. Membership Administration
   A. Membership Basics
      1. Dues structure - Variations in dues for different classifications and types of members
      2. Membership term - one anniversary (please specify months) for all or monthly anniversaries
   B. Renewal Administration
      1. Number and type of notices
      2. Method of acknowledging renewals (ex. letter, certificate, card, etc.)
      3. Exit surveys for non-renewals (phone, writing)
   C. Prospect Development
      1. Average number of requests for membership information per month
      2. Available material for prospect packages (brochure, flyer, rate card, fact sheets, etc.)
      3. Follow-up after informational packages are sent
      4. Proactive development of new members
         a. Identification and targeting of prospects
         b. Development and implementation of membership building campaigns
   D. New Members
      1. Anticipated growth
      2. Method of acknowledging new members
      3. New member orientations - how many, when; planning and facilitation, etc.
   E. Retention Initiatives
      1. Integration/involvement of new members
      2. Reinforcement of membership value to existing & renewing members
      3. Training and coordination of volunteers
      4. Hosting/mentoring programs
   F. Membership Surveys
      1. Frequency, authorship and uses
      2. Distribution and response (on-line, mailed, faxed)
      3. Who develops, implements, follows up, analyzes, prepares presentation

V. Communications/Publications
   A. Newsletter, magazine
      1. Frequency and format
      2. Size and method of distribution
      3. Volunteer editor's role
      4. Staff involvement in writing/editing, production, distribution
      5. Advertising development and management
      6. Availability to non-members
   B. Directory
      1. Frequency of publication/distribution (print, on-line, CD, etc.)
      2. Material included in addition to basic membership list- number and type of cross-reference sections
      3. Advertising development and management
      4. Availability to non-members
   C. Miscellaneous topical materials (ex. legislative updates, calendar notices, special invitations)
      1. Frequency and format
      2. Size and method of distribution

VI. Communications/Interactive
    A. List Serve
        1. Eligibility
        2. Monitoring of postings and content
        3. Extent of use
    B. On-Line Community (ex Link-In, Facebook, CollectiveX)
        1. Eligibility
        2. Management of Community Site
        3. Monitoring of postings and content
        4. Extent of use

VII. Meeting/Conference/Trade Show/Special Event Management
    A. Basics – how many, type, where, when, how long, how many attendees
    B. Registration policy (preregistration, on-site or both; charged payments), extent of invoicing
    C. Facility arrangements
        1. Identification and selection of facility
        2. Contract negotiations
        3. Logistics and amenity arrangements: food, room set-up, A-V, hotel room block & reservations, travel arrangements, etc.
        4. AV, light, sound requirements
    D. Marketing/promotions
        1. Type and number of promotions (mailers, web page, press releases, reminder postcards, telemarketing) and size of mailings for print pieces
        2. Management involvement (write/edit, design, lay-out, typeset print pieces; conduct telemarketing)
    E. Educational sessions
        1. Selection and preparation of speakers
        2. Types of presentations: keynote, parallel sessions, workshops, general sessions/lecture hall, or a combination
    F. Special events (ex. dinners, tours, entertainment, golf, etc.)
    G. Materials
        1. Program, handouts, conference proceedings book, etc.
        2. Signage
        3. Association display
        4. Conference evaluations
        5. etc.
    H. Exhibit Hall/Trade Show
        1. Type and number - table tops, booths, poster boards, etc.
        2. Identification, marketing and administration
    I. Sponsorships and/or advertisers
        1. Identification, sales, follow up
        2. Amount/number
    J. On-site services
       Ex. registration, facility coordination, exhibit hall services

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VIII. <u>Legislative</u> <u>Activities</u>
Services to be provided by management on the association's behalf or in cooperation with the efforts of volunteers, paid lobbyist (ex. legislative monitoring, PAC administration, legislative alerts, Lobby Day arrangements, etc.)

IX. <u>Public</u> <u>Relations</u> / <u>Public</u> <u>Awareness</u>
A. Media database
B. Initiatives and materials (press releases, informational flyers, position papers, etc.)
C. Crisis plan
D. Spokesperson training

X. <u>Miscellaneous</u> <u>Member</u> <u>Services</u>
Programs and materials available to members, as part of their memberships and/or additional programs and materials sold to members and/or non-members

Please enclose samples of typical printed materials such as your newsletter, meeting flyer, directory, etc. and copies of your budget and by-laws with the RFP.