REQUEST FOR ASSOCIATION INFORMATION

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| **GENERAL INFORMATION** | | |  |  |  |
| Association name: Association Address: Contact person: Association position: Contact title, company: Address, city, state, zip:  Telephone: Fax: | | | | | |
| **ORGANIZATION** I | | | | | |
| 1. What is the primary geographic scope of your association?    * International □ National □ Regional    * State □ Local 2. What is the primary industry o:r profession served by your association? | | 1. Is the association incorporated? □ Yes □ No State of incorporation: 2. What is the IRS tax status of your association?   □ 501(c)3 □ 501(c)6  □ Other:   1. Is your association's IRS *tax exemption letter of determination* on file? □ Yes □ No | | | |
| 3. What is the primary type of membership in your association?  □ Companies/Institutions □ Individuals □ Both | |
| **MEMBERS HIP** | | | | | |
| 1. Total number of current members in your association? | | 1. Is your association's membership information computerized? □ Yes □ No    1. If "yes," what equipment is used?    2. If "yes," what software is used? | | | |
| 2. What is the number of potential members? |  |
| 3. Is the membership: □ Increasing □ Decreasing  □ About the same as previous year | |
| 5. What are the classes of membership in your association?  **Number** of  **Categorv/DescriEtion Members** | | Voting  □  □  □  □  □ | **Non-voting**  □  □  □  □  □ | **Annual Dues Rate**  Per Catggon:  $  $  $  $  $  Revised 11/97 | |

**The following is a checklist that will facilitate a comprehensive, open exchange of information between your organization and a prospective association management company.**

**DATE·**

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**BOARD OF DIRECTORS**

1. Number of directors on the board: 5. Does your association have an executive committee? D Yes □ No
2. Number of officers:
   1. If "yes," how many members serve on the
3. How often does the board typically meet each year? executive committee?
   1. In person: b. How often does the executive committee meet each Number of days per meeting: year?
   2. By teleconference :
      1. In person:
4. On what dates and in which cities did your board hold Number of days per meeting: meetings during the past year? 2) By teleconference:

**Date City**

**COMMIIT EES**

1. Please list all other current committees/task forces, and provide meeting information for each (per year):

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **No. Serving** | **No. of Meetings** | **No. of Days** | No. of **Meetings by** |
| **Name of Committee** | **on Committee** | **in Person** | **Per Meeting** | **Teleconference** |

1. Are board or committee members reimbursed for expenses? □ Yes □ No

If "yes," on what basis?

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| **FINANCIAL MANAGEMENT** | | | | | | |  |  |
| 1. What is your association's current budgeted: | | | | | 1. What procedures do you use in administering your checking account(s)?   Number of signatures required:  Number of accounts: Other (please describe):   1. What is your association's employer identification number (EIN)? 2. Do you have copies of your IRS Form 990 available for the past 3 years? **0** Yes □ No | | | |
| Total annual revenues? $ | | | | |
| Total expenses?$ | | |  | |
| 2. | | In what month does your fiscal year begin? | |  |
|  | | |
| 3. | | What was your fund balance at end of last fiscal year? | | |
|  | | $ | | |
| 4. | | How often are your association's financial statements | | |
|  | | prepared? | | |
|  | |  | | |
|  | **SERVICES, PROGRAMSJ AND** | | | | | **ACTIVITIES** | I | |
| Please indicate which current services, programs, and activities your association offers its membership (use additional sheets if necessary):   * Statistical Reporting □ Surveys □ Standardization * Marketing Research **0** Marketing Promotion/ Advertising □ Public Relations * Group Insurance □ Education □ Testing and Certification * Chapter Programs/ Assistance □ Government Relations □ Long-range Planning * Training □ Credit/Collection □ Technical * Other (please describe): | | | | | | | | |
| **LEGAL** | | | | | | | | |
| 1. Does your association regularly retain or employ legal counsel? □ Yes □ No  If "yes," who? | | | | | 1. Does your legal or any other external service report directly to any of the following?    * Board **0** Executive Committee    * Executive director/ account executive of the association management company    * Other (please describe): | | | |
| I **LOBBYIN G** | | | | | | | | |
| 1. Does your association regularly retain or employ a lobbyist?  **0** Yes □ No | | | | | If "yes," what is the scope of your lobbying activities? | | | |
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| I **MANAGEMENT STAFF** | | | | | | | | |
| 1. Is your association currently being managed by an association management company?   **0** Yes □ No   1. Is the company aware of the search?   **0** Yes □ No | | | | | 1. If your association is not being managed by an association management company, does it currently have a management staff and a headquarters?   **0** Yes □ No   1. If "yes," is the current management staff aware of the search for new management? □ Yes □ No | | | |

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## I MEETINGS, CONFERENCES, AND TRADE SHOWS I

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

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

1. Does your association typically attend meetings, conferences, or shows other than those it produces?

0 Yes 0 No

If "yes," please explain why?

## COMMUNICATIO s

1. Does the association have a newsletter? 4. Approximately how many times are bulletins or other

0 Yes 0 No mailings sent to members each year?

If "yes": Explain, if necessary:

1. How often is it published?
2. Number of pages?
3. Does it carry advertising? 0 Yes 0 No 5. Who is responsible for producing your publications?
4. Does the association have a magazine or newspaper? - 0 Outside contractor 0 Members

0 Staff 0 Combination:

If "yes":

1. How often is it published? 6. Who is responsible for producing your membership
2. Number of pages? directory?
3. Does it carry advertising? 0 Yes 0 No

0 Outside contractor 0 Members

1. Does the association have a membership directory 0 Staff 0 Combination: or roster? 0 Yes 0 No

If "yes":

* 1. How often is it published?
  2. Number of many pages?
  3. Does it carry advertising? 0 Yes 0 No
  4. What other information does it contain?

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|  | **REQUIRED MATERIALS** | | |  | I |
| Please attach a copy of the following items:  0 Copy of by-laws 0 Current financial statement  0 List of officers and directors 0 Mission statement or purpose of  the association | | | | 0 Financial statement of last full year | |
| I **REQUESTED MATERIALS** I | | | | | |
| 1. The following items are also requested: | | | |  | |
| 0 Magazine | | 0 | Membership application | 0 Roster of present management | |
| 0 Newsletter | | 0 | Membership brochure | 0 Annual.meeting promotional brochure | |
| 0 Newspaper | | 0 | Membership directory | 0 Trade show promotional brochure | |
|  | | | | 0 Board meeting minutes from the past | |
|  | | | | 1-3 years | |