REQUEST FOR ASSOCIATION INFORMATION

|  |  |  |  |
| --- | --- | --- | --- |
| **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·**

I

I

**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?

# I

|  |  |  |
| --- | --- | --- |
| **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 □ NoIf "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? |
|  |
|  |
|  |
| I **MANAGEMENT STAFF** |
| 1. Is your association currently being managed by an association management company?

**0** Yes □ No1. 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 □ No1. If "yes," is the current management staff aware of the search for new management? □ Yes □ No
 |

I

I

## I MEETINGS, CONFERENCES, AND TRADE SHOWS I

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

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **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?

|  |  |  |  |
| --- | --- | --- | --- |
|  | **REQUIRED MATERIALS** |  | I |
| Please attach a copy of the following items:0 Copy of by-laws 0 Current financial statement0 List of officers and directors 0 Mission statement or purpose ofthe 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 |