



Template

Request for Proposal

Association Management Services

When considering a contract for association management services (AMS), it is critically important to identify your needs as the contracting organization. By establishing clear expectations, the organization will be positioned to conduct a fair and critical evaluation of multiple association management company (AMC) offers. This process can be best accomplished through development of a formal Request for Proposal (RFP). A template is provided for reference, but should not be considered all-inclusive. Organization leaders are encouraged to edit and create a comprehensive organizational profile that is unique to their organization, but also follows a generally acceptable RFP process.

PROPOSAL CALL DATE: *[Insert date proposals accepted – Beginning date]*

PROPOSAL CLOSE DATE: *[Insert date proposals no longer accepted.]*

PRIMARY CONTACT: *[Organizational contact name with email address. Phone number optional.]*

SEND ELECTRONIC PROPOSAL TO: *[Provide email address.]*

MAIL PROPOSAL TO: *[Specify if mailed proposals are required. Provide USPS address. May seem redundant, but AMCs often send an abbreviated electronic proposal followed by a formal mailed proposal that includes printed company information.]*

INTRODUCTION

Sample Language:

The [<insert name of organization>](#) is accepting proposals for association management services. Your company is invited to submit a proposal for consideration. Please review our information provided below and submit prior to the listed close date. Please contact the individual listed above if you require additional information in developing your proposal. Only formal proposals will be considered. [<Insert acronym of organization>](#)'s leadership plans to review all proposals within three weeks of the close date and will make a final decision at that time. We look forward to reviewing your submission.

HISTORY OF ASSOCIATION

[Provide brief description of history of the organization with link to website.]

MISSION, VISION, STRATEGIC PLAN

[The mission and vision are often identified in bylaws. Copy and paste here. Include strategic goals if available.]

RELATIONSHIP TO OTHER RELATED ORGANIZATIONS

[Is organization a constituent to the American Academy of Physician Assistants or affinity partner with other stakeholder organizations? Do you have a Foundation or Political Action Committee? If so, insert here.]

SUMMARY OF ASSOCIATION STATUS / CONCERNS

[This is an important section of the RFP which will require some thought. Describe in detail the current market position of the organization contrasted against leadership's vision for the future. Identify current barriers to the envisioned future and expectations of how an AMC relationship may provide assistance in removing barriers.]

TYPES OF MEMBERS

[Insert membership categories and definitions, corresponding dues amounts and membership numbers. Include total market numbers (i.e. Number of PAs licensed within a certain state) so that market share may be evaluated. Include membership processing and/or discounting information linked to programs.]

DESCRIPTION OF LEADERSHIP STRUCTURE

[Include detailed description of governance structure to include formal leadership positions, election or appointment processes, voting privileges, terms, standing and ad hoc committees or work groups. This information is often outlined in bylaws.]

DESCRIPTION OF MEETINGS

[Include details of all organizational meetings including local, chapter, regional, formal or informal. Meetings may include face to face and virtual meetings via conference call or web links.]

DESCRIPTION OF PUBLICATIONS

[Include delivery timeline for all printed materials as well as e-communications. Describe the publications with reference to advertising revenue, if applicable along with distribution numbers.]

SUMMARY OF CONTRACTS

[Provide high level list and brief narrative of current contracts with vendors for professional services.]

SCOPE OF SERVICES

[Insert initial details of the arrangement for services requested from the AMC with specific items to be addressed in the final contract. Most AMCs offer administrative services and often do not provide executive or chief administrative officer leadership support. A thorough discussion of organizational needs contrasted against dedicated staff training, experience, and the amount of contracted time are key factors in a successful long term professional relationship.]

Sample language for reference:

Association Management Services defined as listed below and will include support of the following activities:

1. *General Office*
 - a. *Phone (8:30 AM to 5:00 PM)*
 - b. *Fax*
 - c. *Voice Mail*
 - d. *Email*
 - e. *LiveMeeting*
2. *Board Meetings*
 - a. *Frequency: Spring Symposium and fall via conference call on the first and third Thursdays of each month*
 - b. *In Person: Required at Spring Symposium (Estimate one day per year)*
 - c. *Virtual Assistance: Conference Calls (Estimate two evenings per month)*
 - d. *Responsibility of taking minutes*
 - e. *Assist in agenda preparation and distribution*
 - f. *Coordination of meeting notification*
3. *Management Company Facilities*
 - a. *Storage requirements - minimal*
 - b. *Meeting space - none*
 - c. *Maintain book offering list, refreshing it periodically*
4. *Financial Management*
 - a. *Frequency of reports – Published monthly to full Board by the 5th of the following month.*
 - b. *Income and expense responsibility – Prepare financial statements and provide to Treasurer*
 - c. *Budget preparation – Assist in providing historical expense and revenue data and working with volunteer leaders to develop a balance budget.*
 - d. *Investments – Liaison with financial/investment broker at the direction of the Board*
 - e. *Credit card processing*
5. *Membership Council Support Services*
 - a. *Develop and execute membership growth initiatives*
 - b. *Enhance and produce prospect and new member materials*
 - c. *Maintain member database, adding and modifying records.*

- d. *Export database monthly to update the membership directory in the secured portion of the web site. Alternatively, link the database directly to the membership directory.*
- e. *Export database monthly to update database used to send email announcements*
- f. *Manage the renewal cycle, send follow up notices and recommend retention activities to the Membership Committee.*
- g. *Set-up and issue online meeting invitations in support of membership groups*
- h. *Any other activities, designed to increase and retain membership*
- 6. *Conference Planning Support Services*
 - a. *Full event planning, registration, and e-commerce services extending horizon to 36 months along a coordinated project planning timeline*
 - b. *Speaker Coordination - Working with Committee, coordinate call and responses with proper confirmation and follow up coordination*
 - c. *Assist volunteer leaders in speaker identification*
 - d. *Provide on-site registration, coordination and other support at spring symposium and fall conferences*
- 7. *Publication Support Services*
 - a. *Publish monthly newsletter*
 - 1. *Solicit and edit articles from identified authors. Using blog tool, add bylines and pictures; correct formatting. Update calendar of events, photo albums, and settings.*
 - 2. *Journals?*
- 8. *Marketing and promotion*
 - a. *Develop a web-based template that can be used to promote all programs and events*
 - b. *Develop content and publish event marketing pieces via email on a planned basis for each event*
 - c. *Develop and publish membership marketing materials*
 - d. *Use the database to aggressively market prospects*
- 9. *Board Support Services*
 - a. *Manage the call for nominations, submission of candidate statements, and publishing the statements to the web site and to the membership.*
 - b. *All aspects of annual board member orientation*
 - c. *Provide administrative and monitoring support to listserv.*
- 10. *Web services*
 - a. *Maintain current information (i.e. educational offerings, award winners, board members, etc.)*
 - b. *Build micro sites in support of offerings.*
 - c. *Review and recommend modifications, redesign, etc. as appropriate.*
- 11. *Awards*
 - a. *Provide support to the awards committee as requested.*
 - b. *Order plaques, trophies, certificates annually*
- 12. *Administrative support*
 - a. *Other administrative support as may be determined from time to time*

After the scope of services is defined, attach documents or brochures providing insight about your organization to potential association management companies. Based on the needs of the organization, identify a minimum of five candidate companies and submit the RFP. Not all

companies will chose to remit. There are many ways to identify potential AMCs. An online directory and automated RFP process are available at the AMC Institute: <http://amci.site-ym.com/search/custom.asp?id=903>

For additional information on working with an association management company, contact a representative of AAPA's Constituent Organization Outreach & Advocacy team at coadministrator@aapa.org or call 571-319-4430.