

# *Management HQ SAMPLE*

## **Request for Proposals (RFP) For ASSOCIATION Management Services**

*DATE*

*Editable version of this document is editable upon request to [info@management-hq.com](mailto:info@management-hq.com).*

### ***ASSOCIATION NAME***

### ***ASSOCIATION LOGO***

### ***About ASSOCIATION***

*Overview of history of organization, mission / vision / goals, and any other information. It can be helpful to include the reason for a management transition.*

### ***Scope of Services Required***

*These are some sample services you may include, along with as many details and specifics as possible.*

- Strategic Guidance
- Governance and Board Support
- Committee Support
- Membership Development and Retention
- Administrative Management and Facilities
- Financial Management
- Other Event and Education Management
- Certification and / or Credentialing Program Administration
- Marketing Communications
- Conference / Convention Management
- Webinar Management
- Data and Technology Management

### ***Budget for Association Management Services***

*Provide monthly and / or annual budget for services.*

**RFP Timeline**

Call for proposals distributed:	<i>DATE</i>
Questions due from respondents:	<i>DATE</i>
Questions provided by <i>ASSOCIATION</i> (to all respondents):	<i>DATE</i>
Proposal Responses Due:	<i>DATE</i>
Proposal Review Completed by Selection Committee:	<i>DATE</i>
Meeting Scheduled with Finalist(s):	<i>DATE</i>
Final Selection Made:	<i>DATE</i>
Finalist Notified:	<i>DATE</i>
Contract Finalized:	<i>DATE</i>
Transition Start Date:	<i>DATE</i>
Full Management Start Date:	<i>DATE</i>

**Contact Information**

For questions regarding this RFP, please contact:

*NAME, TITLE*

*ORGANIZATION*

*E-MAIL and / or PHONE NUMBER*

### **Information Requested of the Management Company**

Please provide answers to the following questions in as concise a manner as possible. Responses should be submitted to *EMAIL ADDRESS* no later than *DATE*.

### **Questions for the Management Company**

#### **General Organization Information**

1. Provide a brief history of your organization, including number of years your organization has been in business and the number of years of experience related to serving a membership organization like *ASSOCIATION*.
2. Provide a summary of your management organization's operations, including your organizational structure.
3. Provide a list and qualifications of the management staff who would work on the *ASSOCIATION's* account.
4. Provide a description of how your management company develops industry expertise in its employees. Describe how your management company leverages the industry expertise of your client boards of directors and members.
5. Please address each area of the scope of services indicating your ability to provide support as part of the management contract.

#### **Strategy**

6. Provide an explanation of how your management company views the roles of the board of directors and the management team. How do you delineate these duties?
7. One goal of the *ASSOCIATION* is to grow our membership. Please describe how you would support us with membership development and retention.

#### **Transition Processes**

8. Please describe the process(es) you would employ to transition *ASSOCIATION* to your management company. Please include a specific transition schedule.

#### **Financial Considerations**

9. Please provide a clear explanation of how your management company charges for its services, including the transition process.
10. Please provide a cost proposal to provide the scope of services.

### **Other Information**

11. Include in this submission a representative client list and provide the contact information for at least three references.
12. Please include other information that you believe will aid ASSOCIATION in the evaluation of your proposal.

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