



ASSOCIATION MANAGEMENT QUESTIONNAIRE

Please fill out the Request for Proposal form and
fax to MSM at 714-744-8975

Contact Name: _____ Phone: (____) _____ Fax: (____) _____

E-Mail: _____

Please describe briefly the association or organization seeking information on association management services:

Private for Profit Non Profit (501(c)3 501(c)6) Incorporated (Country, State, etc.)

1. Current number of Association members: _____

1a. Number approximately 1 year ago: _____

1b. Number approximately 2 years ago: _____

2. Is there a membership application process? Yes No

3. Approximate number of membership or other mailings per month: _____

4. Number of functioning committees of the organization including Board and/or Executive Committee: _____

5. How long has the organization been in existence? _____

6. How often does the Board meet? Annually Biannually Other _____

6a. How often do committee(s) meet? Annually Biannually Other _____

7. Does the organization have income from membership dues? Yes No

7a. If yes, how much are annual dues? _____

8. Does the organization raise money through donations/grants? Yes No

(e.g. Do you solicit sponsorship from companies/corporations for education of members, public education, research, etc.?)

8a. If yes, what is your annual fund-raising goal (other than funds required for operation of your annual meeting)? _____

9. Does the organization have a web site? Yes No
9a. If yes, what is the site? _____

10. Does the organization track member email addresses? Yes No

11. Goals you have set for the next 12 months:
1. _____
2. _____
3. _____

12. The greatest current administrative challenge
To the organization is: _____

13. Please indicate your interest in the following services provided by MSM:

- Headquarters service-answer phones, respond to requests & correspondence, act as liaison to members and public
- Overall administration of association
- Membership list & database maintenance
- Budget development/preparation and tracking
- Maintenance of dues records & invoicing
- Financial Reports
- Literature: design, development, Production
- Newsletter: proofread, edit, distribute
- Committee activity and support services
- Generation of Board/Committee Minutes
- By-laws structure: updates and revision
- Web site design and programming
- Web site maintenance and updates
- Staff Executive/Board meeting (___per year)
- Staff Committee meetings (___per year)
- Member education/workshops/seminars
- Other: _____
- _____
- _____

14. Rate these qualities for their importance to your Organization in a management firm or Executive director. (1 being low, 10 being high)

- _____ Financial organization skills
- _____ Provider of good membership services
- _____ Sensitivity and tact
- _____ Enthusiasm for the organization's Mission
- _____ Ability to provide personalized service to the organization's leadership
- _____ Ability to organize and implement excellent annual meetings
- _____ Access to wide variety of software and in-house management tools
- _____ Strong, flexible staff
- _____ Cost effectiveness
