

# ASSOCIATION MANAGEMENT QUESTIONNAIRE



Please fill out the Request for Proposal form and  
fax to MSM at 714-908-9777

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