



154 Hansen Road, Suite 201  
 Charlottesville, VA 22911, USA  
 Telephone: +1 434.971.4788  
 Facsimile: +1 434.977.1856  
 www.custommanagement.com

## Request for Proposal

Please submit to [cmg@custommanagement.com](mailto:cmg@custommanagement.com) or fax/mail to the information above.

Deadline to respond to RFP \_\_\_\_\_ Anticipated start date \_\_\_\_\_

### Organization Information

Organization Name \_\_\_\_\_

Acronym \_\_\_\_\_

Contact Person \_\_\_\_\_ Title \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_

Post Code \_\_\_\_\_ Country \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Email \_\_\_\_\_ Website \_\_\_\_\_

Year Founded \_\_\_\_\_ IRS Tax Status  501(c)3  501(c)6  Other \_\_\_\_\_

Current Management \_\_\_\_\_ Years with Management \_\_\_\_\_

If this organization is not currently managed by an AMC, does it have management staff and a headquarters?  Yes  No

Is current management staff aware of the search for new management?  Yes  No

How many full-time equivalents provide services to your organization? \_\_\_\_\_

Is this number adequate? If not, please explain. \_\_\_\_\_

### Organization Scope

International Countries served \_\_\_\_\_

National Country served  United States  Other \_\_\_\_\_

Regional Region(s) served \_\_\_\_\_

Please describe the profession/industry served by this organization \_\_\_\_\_

### Membership

Membership Type     Individuals                       Companies/Institutions                       Both

Number of individual members \_\_\_\_\_      Number of company/institution members \_\_\_\_\_

Membership is             growing                       decreasing                       constant

Individual Member Goal \_\_\_\_\_      Company/Institution Member Goal \_\_\_\_\_

Does the organization have chapters?             Yes             No            Number of chapters \_\_\_\_\_

Please describe the chapters and any services to be provided to them. \_\_\_\_\_

\_\_\_\_\_

### Board of Directors

Number of Members \_\_\_\_\_

Meetings are held     Face-to-face            Number per year \_\_\_\_\_      Number of days per meeting \_\_\_\_\_

By teleconference            Number per year \_\_\_\_\_

### Committees/Special Interest Groups

Number \_\_\_\_\_      Focus areas \_\_\_\_\_

\_\_\_\_\_

Meetings are held     Face-to-face            Number per year \_\_\_\_\_      Number of days per meeting \_\_\_\_\_

By teleconference            Number per year \_\_\_\_\_

### Financial Information

Current annual revenue \_\_\_\_\_      Current annual expense \_\_\_\_\_

Fiscal year begins \_\_\_\_\_      Dues billing begins \_\_\_\_\_

### Conferences/Meetings

Meeting Name and Dates	Number of Attendees	Registration Fee	Number of Sessions	Number of Speakers	Number of Exhibits

Does the organization exhibit at other conferences/meetings?  Yes  No

Please provide the conference/meeting names and dates where your organization plans to exhibit in the next 12 months. \_\_\_\_\_  
\_\_\_\_\_

### Services to be Provided

- Membership Management
- Financial Management
- Meeting Management
- Certification
- Website Design
- Website Maintenance
- Graphic Design
- Publications
- Data Management
- Workshops
- Webinars
- Marketing
- Strategic Planning
- Leadership Training
- Journal Subscriptions
- Other

If other, please explain \_\_\_\_\_  
\_\_\_\_\_

Does your organization engage in lobbying/legislative affairs?  Yes  No

*Please note that CMG will work with the client to outsource all lobbying/legislative affairs.*

### Areas for Improvement

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Publications/Communications

- Print Newsletter  Monthly  Quarterly  Annual  Other \_\_\_\_\_
- Online Newsletter  Monthly  Quarterly  Annual  Other \_\_\_\_\_
- Print Directory  Online Directory
- Other  If other, please explain \_\_\_\_\_

Does your organization accept advertising?  Yes  No

Who is responsible for producing publications?  Members  Staff  Contractor  Other

If other, please explain \_\_\_\_\_

### Additional Materials

Please include as many the following documents as possible: Articles of Incorporation/Bylaws, strategic plan, financial statement with budget (current and last full year), most recent 990, copies of program brochures and calendar of events. If there is any further information that is important for CMG to consider, please include it with your organization's RFP.