



Please complete this form and save to your harddrive before you print / fax or email.

REQUEST FOR ASSOCIATION INFORMATION

The following is a checklist that will facilitate a comprehensive, open exchange of information between your organization and a prospective association management company.

Date: _____

GENERAL INFORMATION

Association Name: _____

Association Address: _____

Contact person: _____ Association position: _____

Contact title, company: _____

Address, city, state, zip: _____

Telephone: _____ Fax: _____

E-mail address: _____

ORGANIZATION

1. What is the primary geographic scope of your association?
 International National Regional
 State Local
2. What is the primary industry or profession served by your association? _____
3. What is the primary type of membership in your association?
 Companies/Institutions Individuals Both
4. Is the association incorporated? Yes No
 State of incorporation: _____
5. What is the IRS tax status of your association?
 501(c)3 501(c)6
 Other: _____
6. Is your association's IRS *tax exemption letter of determination* on file? Yes No

MEMBERSHIP

1. Total number of current members in your association?

2. What is the number of potential members? _____
3. Is the membership: Increasing Decreasing
 About the same as previous year
4. Is your association's membership information computerized?
 Yes No
 a. If "yes," what equipment is used? _____

 b. If "yes," what software is used? _____

5. What are the classes of membership in your association?

CATEGORY/DESCRIPTION	NUMBER OF MEMBERS	VOTING	NON-VOTING	ANNUAL DUES RATE PER CATEGORY
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>	\$ _____

BOARD OF DIRECTORS

1. Number of directors on the board: _____

2. Number of officers: _____

3. How often does the board typically meet each year?

a. In person: _____

Number of days per meeting: _____

b. By teleconference: _____

4. On what dates and in which cities did your board hold meetings during the past year?

DATE

CITY

5. Does your association have an executive committee?

Yes No

a. If "yes," how many members serve on the executive committee? _____

b. How often does the executive committee meet each year?

1) In person: _____

Number of days per meeting: _____

2) By teleconference: _____

COMMITTEES

1. Please list all other current committees/task forces, and provide meeting information for each (per year):

NAME OF COMMITTEE	NO. SERVING ON COMMITTEE	NO. OF MEETINGS IN PERSON	NO. OF DAYS PER MEETING	NO. OF MEETINGS BY TELECONFERENCE

2. Are board or committee members reimbursed for expenses? Yes No

If "yes," on what basis? _____

MEETINGS, CONFERENCES, AND TRADE SHOWS

1. Please list all meetings, conferences, and trade shows produced by/for your association each year:

TYPE OF EVENT	NO. OF MEETINGS PER YEAR	CITY/CITIES WHERE EVENT LAST HELD	NO. OF DAYS PER EVENT	TOTAL ATTENDANCE	NO. OF SESSIONS	NO. OF EXHIBITORS	TOTAL NET SQ. FEET OF EXHIBIT SPACE
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____

2. Does your association typically attend meetings, conferences, or shows other than those it produces? Yes No

If "yes," on what basis? _____

COMMUNICATIONS

1. Does the association have a newsletter? Yes No

If "yes":
 a. How often is it published? _____
 b. Number of pages? _____
 c. Does it carry advertising? Yes No

2. Does the association have a magazine or newspaper?

Yes No
 If "yes":
 a. How often is it published? _____
 b. Number of pages? _____
 c. Does it carry advertising? Yes No

3. Does the association have a membership directory or roster?

Yes No
 If "yes":
 a. How often is it published? _____
 b. Number of many pages? _____
 c. Does it carry advertising? Yes No
 d. What other information does it contain? _____

4. Approximately how many times are bulletins or other mailings sent to members each year? _____
 Explain, if necessary: _____

5. Who is responsible for producing your publications?

Outside contractor Members
 Staff Combination: _____

6. Who is responsible for producing your membership directory?

Outside contractor Members
 Staff Combination: _____

7. Does your association have a Web site? Yes No

If "yes":
 a. What is your Web address?

 b. How often is your Web site updated?
 Daily Weekly Monthly
 Other (please explain): _____
 c. Who updates your Web site?
 Outside contractor Members
 Staff Combination: _____

FINANCIAL MANAGEMENT

1. What is your association's current budgeted:
 Total annual revenues? \$ _____
 Total expenses? \$ _____
2. In what month does your fiscal year begin? _____
3. What was your fund balance at end of last fiscal year?
 \$ _____
4. How often are your association's financial statements prepared?

5. What procedures do you use in administering your checking account(s)?
 Number of signatures required: _____
 Number of accounts: _____
 Other (please describe): _____
6. What is your association's employer identification number (EIN)? _____
7. Do you have copies of your IRS Form 990 available for the past 3 years? Yes No

SERVICES, PROGRAMS, AND ACTIVITIES

Please indicate which current services, programs, and activities your association offers its membership (use additional sheets if necessary):

- | | | |
|---|--|--|
| <input type="checkbox"/> Statistical Reporting | <input type="checkbox"/> Surveys | <input type="checkbox"/> Standardization |
| <input type="checkbox"/> Marketing Research | <input type="checkbox"/> Marketing Promotion/Advertising | <input type="checkbox"/> Public Relations |
| <input type="checkbox"/> Group Insurance | <input type="checkbox"/> Education | <input type="checkbox"/> Testing and Certification |
| <input type="checkbox"/> Chapter Programs/Assistance | <input type="checkbox"/> Government Relations | <input type="checkbox"/> Long-range Planning |
| <input type="checkbox"/> Training | <input type="checkbox"/> Credit/Collection | <input type="checkbox"/> Technical |
| <input type="checkbox"/> Other (please describe): _____ | | |

LEGAL

1. Does your association regularly retain or employ legal counsel?
 Yes No
 If "yes," who? _____
2. Does your legal or any other external service report directly to any of the following?
 Board Executive Committee
 Executive director/account executive of the association management company
 Other (please describe): _____

LOBBYING

1. Does your association regularly retain or employ a lobbyist?
 Yes No
- If "yes," what is the scope of your lobbying activities?

MANAGEMENT STAFF

1. Is your association currently being managed by an association management company?
 Yes No
2. Is the company aware of the search?
 Yes No
3. If your association is not being managed by an association management company, does it currently have a management staff and a headquarters? Yes No
4. If "yes," is the current management staff aware of the search for new management? Yes No

REQUIRED MATERIALS

Please attach a copy of the following items:

- | | | |
|---|--|--|
| <input type="checkbox"/> Copy of by-laws | <input type="checkbox"/> Current financial statement | <input type="checkbox"/> Financial statement of last full year |
| <input type="checkbox"/> List of officers and directors | <input type="checkbox"/> Mission statement or purpose of the association | |

REQUESTED MATERIALS

The following items are also requested:

- | | | |
|-------------------------------------|---|--|
| <input type="checkbox"/> Magazine | <input type="checkbox"/> Membership application | <input type="checkbox"/> Roster of present management |
| <input type="checkbox"/> Newsletter | <input type="checkbox"/> Membership brochure | <input type="checkbox"/> Annual meeting promotional brochure |
| <input type="checkbox"/> Newspaper | <input type="checkbox"/> Membership directory | <input type="checkbox"/> Board meeting minutes from the past 1-3 years |

To return the completed request either, print and fax to +1 (908) 359-7619 or email to info@association-partners.com

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