



Please complete and return this form to: [info@am.kwglobal.com](mailto:info@am.kwglobal.com)

## Section 1. About Your Organization

1. **Organization Name:**
2. **Organization Preferred Acronym:**
3. **Organization Website:**
4. **Organization's Headquarters Location:**
5. **Primary Contact First and Last Name:**
6. **Contact's Position with Organization:**
7. **Contact Email:**
8. **Contact Phone:**
9. **Mission, Vision, Strategic Plan:** *The mission and vision are often identified in bylaws. Include strategic goals, if available.*
10. **Relationship(s) to Other Related Organizations:** *Is organization a constituent/chapter to or affinity partner with other stakeholder organizations? Do you have a Foundation or Political Action Committee.*
11. **Summary of Organization Status and/or Concerns:** *Describe the current position of the organization contrasted against leadership's vision for the future. How might an association management company (AMC) help?*
12. **Member Types:** *Provide membership categories and definitions, corresponding dues amounts and membership numbers. Include membership processing and/or discounting information linked to programs.*
13. **Description of Leadership Structure:** *Include a detailed description of the governance structure. Include formal leadership positions, election or appointment processes, voting privileges, terms, standing and ad hoc committees or work groups.*
14. **Description of Meetings:** *Include details of all organizational meetings including leadership, local, chapter, regional, formal, or informal. Specify if the meeting is in-person, virtual, or hybrid, and domestic (US-based) or international.*

- 15. Description of Publications:** *Include delivery timeline for all printed materials as well as e-communications. Describe the publications with reference to advertising revenue, if applicable, along with distribution numbers and target audience.*
- 16. Summary of Vendors:** *Provide high level list and brief narrative of current contracts with vendors for professional services.*
- 17. Requested Scope of Services:** *Share details about all services requested from an association management company with specific items to be addressed in the final contract.*

## **Section 2: Financial Management**

- 18. What specific financial management services do you require?** (e.g., accounting, budgeting, invoicing, tax filings, financial reporting)
- 19. Do you currently use any financial software?**  
Yes                      No
- If yes, what software is currently in place?**
- 20. What level of financial oversight is required?** (e.g., monthly reviews, quarterly audits, annual reports)
- 21. Are there any particular financial reporting requirements?** (e.g., specific financial reports for the board)

## **Section 3: Member Management**

- 22. What are the primary needs for member management?** (e.g., member registration, renewals, engagement tracking)
- 23. How many members do you currently have, and what is the anticipated growth over the next 1-3 years?**
- 24. What type of member data do you track?** (e.g., membership tiers, demographics, renewal dates, event participation)
- 25. What is your current member communication strategy** (e.g., email, newsletters, phone)?

## **Section 4: Marketing and Communication Support**

- 26. What are your main marketing and communication needs?** (e.g. member outreach, event promotion, branding, digital marketing)
- 27. Do you require ongoing content or graphic creation for social media, newsletters, or other communication channels?**  
Yes                      No

**If yes, specify the platforms and frequency.**

- 28. What is your current communication strategy?** (e.g., social media, print media, website content, email newsletters)

**Section 5: Database Needs and Management**

- 29. What database system are you currently using for membership and other organizational functions?** (e.g., Wild Apricot, MemberClicks, GrowthZone, Personify, custom-built system)

- 30. Are you able and willing to migrate to a different software?**

Yes

No

- 31. If you do not currently use software, what functionalities would you require from our software?** (e.g., payment portal with credit card processing, online member forum, mass email server, surveys/forms, member directory, etc.)

- 32. Would you need custom reporting for tracking membership, finances, or other key metrics?**

Yes

No

**If yes, please describe the custom reports needed.**

- 33. Are you looking for a central database that integrates multiple functions (e.g., membership, events, finances)?**

**Section 6: Strategic and Operational Support**

- 34. What long-term strategic goals does your organization have?** (e.g., membership growth, increased advocacy, new program development)

- 35. How do you envision a management partner assisting in achieving these goals?**

- 36. What operational challenges do you face that you would like support with?** (e.g. process improvements, member engagement, strategic planning, leadership development, partnership development, advocacy, board and member communication, comprehensive account oversight, fundraising)

- 37. Has the organization undergone a strategic plan in the last 5-10 years?**

Yes

No

**If yes, please include documentation from this effort with this completed form.**

**Section 7: Proposal Requirements**

**38. Association Management Services Needed:**      Full Service Management      A La Carte Services

**39. What is your budget range for the services required?**

**40. What is your expected timeline for selecting a management partner?**

**41. Do you have any specific contractual terms that should be considered in the proposal?**

**Section 8: Additional Information**

**42. Will the AMC office serve as the organization's headquarters?**

Yes

No

**43. Please provide any other information that would be helpful for us to understand your needs.**