



Submit Request For Proposal (RFP) For Association Management Services

Please complete this form to submit your RFP for association management services with Advanced Association Management (AAM). Visit us online at www.youraam.com.

IMPORTANT NOTE: A full RFP submission is not necessary to inquire to AAM. While more information allows us to provide a more precise response, a contact name and number is enough to start the RFP process. Whether you require all the services offered by AAM or a single service to accomplish your goals, your services can be custom-tailored to fit your unique organization. We thank you for the opportunity to serve your organization.

Should you need assistance with your RFP submittal, please contact: Kathi Schildt, President, Advanced Association Management, 521 First Street, PO Box 10, Milford, NE 68405; Phone: 402-761-2216; kschildt@youraam.com

Organization Details:

Name of organization & acronym: _____

Contact Person (First/Last Name): _____

Contact Person's Role: Board Member Staff Volunteer Other _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: () _____ - _____ Website: _____

Email for Contact Person: _____

Year Established: _____ Current Number of Members: _____

Website: _____ Accounting Method: Cash Accrual

Number of Annual Face-To-Face Meetings: _____ Avg. Number of Attendees: _____

Currently Managed by: Assn Mgmt Co. Association Staff Volunteers New Association

Fiscal Year Begins: _____ Current Year Income Budget: _____ Expenses Budget: _____

Annual Income for recent fiscal year: _____ Total Annual Expenses for recent fiscal year: _____

Total Equity at Last Year End: _____ Has Board Authorized Search? Yes No

What prompted your search for a Management Company? _____

IRS Classification: 501(c)3 501(c)6 Other (specify): _____



Services Desired – Please check all that apply:

- Executive Director Board/Committee Support Creative Design Services Strategic Planning
- Financial Management Event Management Communications Website Hosting & Design
- Database Management Membership Development Newsletters Mailings
- Undecided Other (be specific): _____

Please include any additional information that you think will be helpful to further understand your needs:

Please attach any documents that you may have developed as a request for proposal. Please indicate the following here or on your attached documents:

Proposal Due Date: _____ Number of Copies: _____

Method for Submission:

Mail to: _____

Email to: _____

Questions?

Don't hesitate to call our office should you have any questions – we are here for you and your members!

AAM will treat all information as confidential and will not release any information without permission.