



ASSOCIATION MANAGEMENT QUESTIONNAIRE

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-C3 501-C6) 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 standing 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
If yes, what is the site address: _____

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 BSC.

- Headquarters service - answer phones, respond to requests & correspondence, act as liaison to members and public
- Overall administration of association
- Membership list & database maintenance
- Membership application process
(Approximate of membership applications per year _____)
- Membership recruitment
- Budget development/preparation and tracking
- Maintenance of dues records & invoicing
- Financial reports
- Literature: design, development and production
- Newsletter: write, produce, arrange printing
- Annual report: write, design, produce
- Committee activity and support services (of committees: ____)
- Generation of Board/ Committee minutes
- By-laws structure: updates and revision
- Fund-raising and grantsmanship
- Public information and public relations
- Legislative Information: Track & report
- Web site design and programming
- Web site maintenance and updates
- Staff Executive/Board meetings (_____times per year)
- Staff Committee meetings (_____times per year)
- Administrative oversight of research projects
- Liaison with journal
- Sales of organization's promotional products (t-shirts, mugs, etc.)
- Member education/workshops/seminars
- ACCME/CEU (or equivalent) accreditation & administration
- Advertising Sales for publications
- Other: _____

14. Rate these qualities for their importance to your organization in a management firm or executive director.

LOWEST	HI HEST
① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩	Financial organizational skills
① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩	Provider of good membership services
① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩	Sensitivity and tact
① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩	Enthusiasm for the organization's mission
① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩	Ability to provide personalized service to the organization's leadership
① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩	Ability to organize and implement excellent annual meetings
① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩	Ability to raise funds
① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩	Access to wide variety of software and in-house management tools
① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩	Strong, flexible staff
① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩	Cost effectiveness

Please fax to BSC Management at (310) 437-0585 or complete and return electronically



CONFERENCE PLANNING QUESTIONNAIRE

Contact Name: _____ Phone: (____) _____ Fax:(____) _____

E-mail: _____

Please **describe briefly** the association or organization seeking information on conference/meeting planning services:

Private for profit Non profit (501-C3 501-C6) Incorporated (Country, State, etc.)

1. What is the approximate attendance at the conference/meeting(s)?

2. Number of Association members (if related to an association?)

3. Approximate mailing list numbers for potential attendees?

- 3a. What is the status of your current mailing lists? Adequate Need to develop additional target lists
- 3b. Does the organization track member e-mail addresses? Yes No
4. How is the meeting currently marketed?

5. Does the organization have a web site? Yes No
If yes, what is the address:

6. Where is the conference to be held?

- 6a. Is the above location already contracted? Yes No
7. Do you already have conference dates? Yes No
If yes, please list dates: _____ to _____
- 7a. Are the dates flexible? Yes No
- 7b. How often is this conference held?

8. Does the meeting draw attendees that are: Mostly local From out of town (US) International
- 8a. If out of town, how wide is the geographic circle?

9. The meeting venue is a: Hotel Convention Center Other Venue
If other, please describe: _____
10. How many days does the meeting last?

11. What is an average day's schedule?

12. How is the meeting structured? One main session Concurrent sessions
Details: _____

13. Are tours or activities available for guests not participating in the meetings? Yes No

14. Are social events for the attendees packaged with the meeting? Yes No
Please describe: _____

15. What are the organization's goals for the conference?
Please check all that apply
 Technical updates
 Networking
 Continuing education
 Sales staff meeting/incentive trip
 Other
Please describe: _____

16. Please indicate your interest in the following services provided by BSC.

- Site selection
- Hotel contracts/negotiation
- Faculty/speaker communications/travel
- Technical/audio-visual coordination
- Develop registration form, rules and fee schedules
- Advance registration
- On site registration
- Tour and social events
- Contract negotiations & interface w/convention center, and exhibit management/decorator companies
- Develop and distribute exhibitor prospectus
- Exhibit management/floor plans
- Exhibitor sales/marketing & communications
- Budgets/ accounting function
- Delegate marketing
- Write/design/print advance program/flyers/final program
- Work with Program chair to write/develop program
- Sell advertisements in program books
- Solicit sponsorship/grants
- On site operation of conference
- Organize specialty luncheons
- On site oversight of social functions
- Food and beverage planning and tracking
- Other: _____

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