



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	HIGHEST	
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