

# Total Management Solutions

## REQUEST FOR ASSOCIATION INFORMATION

The following is a checklist that will facilitate a comprehensive, open exchange of information between your organization and Total Management Solutions. Please fill in as much information as possible and return it to TMS, 55 Harristown Road, Glen Rock NJ, or fax to 201-447-3831.

Date: \_\_\_\_\_

### GENERAL INFORMATION

Association Name \_\_\_\_\_

Association Address \_\_\_\_\_

Contact Person \_\_\_\_\_ Association Position \_\_\_\_\_

Contact title, company \_\_\_\_\_

Address, City, State, Zip \_\_\_\_\_

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	Voting	Non-Voting	Annual Dues Rate/Category
_____	_____			\$ _____
_____	_____			\$ _____
_____	_____			\$ _____

**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 what 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? \_\_\_\_\_

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**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 Square Feet of Exhibit Space

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

If "yes," explain why: \_\_\_\_\_

**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 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

- |  |  |
|--|--|
| <p>1. What is your association's current budgeted:<br/>Total annual revenues? \$ _____<br/>Total expenses? \$ _____</p> <p>2. In what month does your fiscal year begin? _____</p> <p>3. What was your fund balance at the end of last fiscal year? \$ _____</p> <p>4. How often are your association's financial statements prepared? _____</p> | <p>5. What procedures do you use in administering your checking account(s)?<br/>Number of signatures required _____<br/>Number of accounts _____<br/>Other (please describe) _____</p> <p>6. What is your association's employer identification number (EIN)? _____</p> <p>7. Do you have copies of your IRS Form 990 available for the past 3 years?    Yes    No</p> |
|--|--|

## SERVICES, PROGRAMS AND ACTIVITIES

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

Statistical Reporting	Surveys	Standardization
Market Research	Marketing Promotion/Advertising	Public Relations
Group Insurance	Education	Testing and Certification
Chapter Programs/Assistance	Government Relations	Long Range Planning
Training	Credit/Collection	Technical
Other (please describe)		

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## LEGAL

- |   |  |
|---|--|
| <p>1. Does your association regularly retain or employ legal counsel?    Yes    No</p> <p>If "yes," who? _____</p> <p>Other (please describe) _____</p> | <p>2. Does your legal or any other external service report directly to any of the following?</p> <p style="padding-left: 40px;">Board                      Executive Committee</p> <p style="padding-left: 40px;">Executive director/account executive of the association management company</p> |
|---|--|

## LOBBYING

- |   |   |
|---|---|
| <p>1. Does your association regularly retain or employ a lobbyist?    Yes    No</p> | <p>2. If "Yes," what is the scope of your lobbying activities? _____</p> <p>_____</p> |
|---|---|

### **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:

Copy of by-laws

Current financial statement

Financial statement of last full year

List of officers and directors

Mission statement or purpose of the association

### **REQUESTED MATERIALS**

The following are also requested:

Magazine

Membership Application

Roster of present management

Newsletter

Membership brochure

Annual meeting promotional brochure

Newspaper

Membership directory

Trade show promotional brochure

Board meeting minutes from  
the past 1-3 years

Thank you for providing this information.