



## Key Information

1. Organization Name

2. Acronym

3. Website Address

4. What prompted the search?

5. Proposal Deadline

6. What is the budget amount for services?

7a. Must your new AMC be headquartered in a specific location?\*

☐ Yes

☐ No

b. If yes, specify which country, region, state or metro area.

8. Who is/are the current provider(s) of the services?

9. Type of organization

☐ Trade Association

☐ Professional Society

☐ Foundation

☐ Other

10. IRS Classification

☐ 501(c)3

☐ 501(c)6

☐ Other

## Services Requested

11. Services Requested  
(select all that apply)

- ☐ Advisory Services (Consulting, Leadership Development, Strategic Planning, etc.)
- ☐ Financial Management
- ☐ Certification/Accreditation Management
- ☐ Conferences/Meetings Management
- ☐ Consulting Services (Management Consulting, Strategic Planning, Leadership Training, etc)
- ☐ Government Relations
- ☐ International Expansion
- ☐ Marketing/Communications
- ☐ Membership/Database Services
- ☐ Order Fulfillment
- ☐ Public Relations
- ☐ Sponsorship Sales
- ☐ Survey Services (Needs Assessment, Salary Survey, etc)
- ☐ Website Development and/or Management
- ☐ Other

12. Do you require specific industry expertise or experiences?

- ☐ Yes
- ☐ No

13. Please indicate if any special credentialing is expected of the AMC or its personnel.

14. How important is it for you to hire an AMC Institute Accredited AMC?

- ☐ Mandatory/We will only consider Accredited AMCs
- ☐ Important/Preference will be given to Accredited AMCs
- ☐ Not Important/No preference will be given to Accredited AMCs

15. Does the organization have a formalized search committee?

- ☐ Yes
- ☐ No

16. If yes, are you using a third party?

17. Contact Name

18. Contact's position within the organization

19. Contact's Email Address

20. Mailing Address Line 1

21. Mailing Address Line 2

22. City

23. State

24. Zip

25. Country

26. Phone

27. How did you hear about the AMC Institute RFP process?

28a. How would you like proposals to be delivered to you?

- ☐ Mail  
☐ Email  
☐ Both

b. If by mail, how many copies are required?

29. What is the date for initial screening of proposals by the Search Committee?

30. What is the target date for completion of due diligence on short-listed proposals?

31. What is the date for  
selected proposal  
presentation(s)?

32. What is the location for  
selected proposal  
presentation(s)?

33. What is the start of the  
transition process?

34. What is the formal start  
date?