

## 53 Mineola Road East, Lower LevelMississauga, Ontario, L5G 2E4

## 647 376 6036 email: info@profectusmanagement.com

# Organization RFP Background Information

## Please complete all RFP relevant questions and email to info@profectusmanagement.com

## General Information

|  |  |
| --- | --- |
| Organization Name: | Acronym: |
| Contact Person: | Title: |
| Address: | City, Province, PC: |
| Telephone: | Email: |
| Web address: |
| What Content Management System do you use for your website?: |

## Organization Information

|  |  |
| --- | --- |
| Geographic scope of organization: □ International □ National □ Provincial □ Local | Primary type of membership in your organization:□ Companies/Institutions□ Individuals□ Both |
| If individual, what type of organization are you?□ Strictly member benefits oriented□ Offers voluntary certification tied to membership□ Offers regulated certification□ Other:If other, please describe: |
| Primary industry or profession served by your organization: | Your status:□ Not for profit:□ Charity:□ Other: |

## Membership Information

|  |  |
| --- | --- |
| Total number of current members: | Does your organizations have chapters? □ Yes □ NoIf yes, number of chapters:Locations:□BC □PQ □AB □NS□SK □ NB□MB □PEI□ON □ NL |
| What membership system do you use? | Do you use the membership system for event registration? □ Yes □ NoIf no, what system do you use?Is your registration system online? |

## Board of Directors

|  |  |
| --- | --- |
| Number of Board of Directors: | Number of Meetings Annually:In person:Number of Days per meetingTeleconference: |
| Number of Executive Committee Members: | Number of Meetings Annually:In person:Number of Days per meetingTeleconference: |

## Financial Management

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| --- | --- |
| Organization’s current budgetTotal annual revenues: $ | How often are financial statements prepared? |
| Who is managing the finances and preparing statements? |  |

## Services, Programs, and Activities

|  |
| --- |
| Which services, programs, and activities are offered to membership? |
| □ Statistical Reporting | □ Marketing/PR | □ Program Accreditation | □ Job Board |
| □ Marketing Research | □ Testing and Certification | □ Networking Opportunities | □ Member Discounts  |
| □ Government Relations/Advocacy | □ Continuing Education | □ Civic and philanthropic ventures | □ Training |
| □ Standardization | □ Surveys | □ Coaching/Mentoring | □ OtherPlease describe: |

## Management Staff

|  |  |
| --- | --- |
| Do you currently use an association management company?□ Yes □ No  | Has an RFP been developed for the search of an association management company (either full services or certain outsourced services)?□ Yes □ No |
| If yes, does the current association management company aware of the search?□ Yes □ No |  |

## Event Management

|  |  |
| --- | --- |
| **Face to Face Meetings** | **Webinars** |
| How many events do you hold annually? | How many webinars do you hold annually? |
| How many attendees on average per event? | How many participants per webinar? |
| How many local (GTA) and out of town meetings? | What webinar platform do you use? |
| How many days per event? |  |
| Are your members actively involved in setting the themes/topics and finding speakers for the event?□ Yes □ No |

|  |
| --- |
| What services do you wish to explore with us? Please be as specific as possible.  |
| Expected work cycle (months per year – hours per week) : |

Your preferred method of contact?

□ Telephone □ Email

Other: (please specify)