

Leipper Management

To enable and facilitate the human potential to produce goods and services that will improve the quality of life

Leipper Management

Association Services



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Resources

Hints and tips for the association leader in planning and budgets - inside back cover

Leipper Management web site - <http://leippermanagement.com>.

.....service directory - <http://leippermanagement.com/services/>

.....Dear Association Leader weblog - <http://leippermanagement.com/dal/>

The Coheridy Project: <http://coheridy.com/>

.....Online training resources - <http://coheridy.com/course-resource.html>

I. Executive summary

Leipper Management is an association management company with a focus in providing budget conscious headquarters, back office services, and administrative expertise for small associations and businesses.

A. Service scope

Leipper Management serves government agencies, educational institutions, and commercial and nonprofit organizations. Clients are volunteers, staff members, company managers, and entrepreneurs in industrial and service businesses, nonprofit programs and service organizations, hospitals and health care providers, university departments and colleges, mining and technical industries, and technical, entrepreneur and professional associations.

Delivered products range from custom database applications to guidelines manuals and other publications. Services delivered include basic business communications, board training, organization operations consultation, events planning, organizational planning, and other services needed to maintain an ongoing and viable profit or non-profit organization.

Services and products have been provided to Porsche Cars North America, Desert Palms Hospital, Nevada Technology Council, The University of Nevada, Truckee Meadows Community College Institute for Business and Industry, The Nevada Chiropractic Association, The Nevada World Trade Council, The Fallen Leaf Tract Association, Northern California Association Directors of Volunteer Services, Community Concerts, the Association for Volunteer Administration and others.

B. Location

Leipper Management is physically located in Reno, Nevada. This location provides many assets to client associations including:

- an international airport with access to all major U. S. cities and easy driving distance to San Francisco and other major west coast cities.
- major educational and research institutions.
- a location for many manufacturing and technological industry headquarters.
- excellent conference and meeting facilities

C. Contact

Leipper Management contact for questions, comments, or requests is
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II. Key Personnel.

Leipper Management is a partnership with two key employees and a network of professional partners and independent contractors.

A. **Bryan R Leipper, B.S., M.S. in physics and science education.**

Principal: Leipper Management and consultant in small computer systems and information management since 1978.

M.S. science education: Eastern Connecticut State University. B.S. physics: California Polytechnic State University at San Luis Obispo; California secondary teaching credentials in Physics, Chemistry, Mathematics, and Music: University of California at Santa Barbara.

Employment: four years in public school science education and four years as programmer/analyst at nationwide medical service firm.

Research scientist: investigating west coast airport visibility forecasting supporting work funded by a Federal Aviation Administration grant and staff at the Desert Research Institute.

National Education Association local chapter delegate; Junior Achievement mentor.

Author and columnist, amateur radio curriculum development and program management for a nationwide network of volunteers, instructor and student materials; calculating satellite orbits with simple computer systems; newspaper small business column; newsletters; presentation materials. Self published white papers and articles related to fog forecasting on the Northern California coast.

Software system design and implementation: multi-computer jobs management system, contact database, insurance planning, geographic properties and mapping, custom business applications.

Design, implement and support: a national service bureau control and management system utilizing a network of minicomputers and intelligent workstations; a district manager's laptop system with forms management, inventory locator, and price guide support; a human resources information management system for hospital volunteers.

Guest lecturer UNR Dept. of Engineering; Presenter for the International Conference for Volunteer Administration, Calgary BC, Canada.

Assist in the development of state mandated teacher evaluation policies, practices, and methods for a public high school in Connecticut.

B. **Diane L. Leipper, B.A. in social work and community services**

Principal: Leipper Management Emphasis on human resources development including the development of board, member, and volunteer participation.

Bachelor of Arts, Social Work, University of Nevada, Reno 1982

Licensed Social Worker in the State of Nevada 1988 - 1998

Experience: twenty years experience in volunteer management for youth services, health care organizations, and crisis and disaster programs. She has been a program director, a trainer, a board member, and a volunteer for a variety of non-profit organizations. She has over eight years experience in database management systems for human service programs.

Co-creator: pilot project with the Society of Critical Care Medicine to design and implement a volunteer program for families of critically ill patients. Provided sample documents procedures and editorial comments for the program manual. This program is distributed nationally.

Co-author: designed, and produced a booklet on legislative advocacy for the American Society of Directors of Volunteer Services

Author: *Volunteerism: Opportunities for Everyone* and *Automated Data Management Systems for a Volunteer Program* published in **The Journal of Volunteer Administration**.

Creator/author: Manual on exhibit management and on conference scholarship committee management for AVA.

Organized volunteers to implement a message information database designed in partnership with Bryan Leipper, to enable the local Red Cross Chapter to be the first to automate the sending of Disaster Welfare Inquires via Western Union messaging during the Loma Prieta Earthquake.

Organized volunteers teams to assist in creating and producing Girl Scout council-wide events with attendance of over 1200 such as a Winter Olympics at Soda Springs California, a Health and Fitness Fair in Fallon Nevada, and a World of Arts at the MGM Grand in Reno, Nevada.

Presenter: Nebraska Governors Conference on Volunteerism 2001- team building and stress management, Region XI, AVA Conference - June 1995; Association for Volunteer Administration International Conference - October 1996, several local workshops and trainings.

Association for Volunteer Administration service on the 1994 Conference Steering Committee and on the Regional Nominations Committee; International Association for Volunteer Effort service on the North American Region Steering Committee; Sparks Optimist; American Society Directors of Volunteer Service of the American Hospital Association; The Northern California Association Directors of Volunteer Services; St. Mary's Hospice Council; Career College of Northern Nevada Advisory Board; Association of Girl Scout Executive Staff.

American Society of Directors of Volunteer Services National Conference - 11/90, 11/92, 10/93, 10/94; California Hospital Association Hospital Volunteer Directors Conference - 2/93, 2/94, 2/95, 2/96, 2/97; Association for Volunteer Administration International Conference - 10/91, 10/94, 10/95, 10/96

Recipient of the 1995 Comstock Sertoma Service to Mankind Award

Recipient 1988 Girl Scout Gold Award

III. Proven competencies

A. Administrative support

Leipper Management personnel have over 20 years experience in association management and administrative support for small businesses, volunteer programs, and other organizations. Some highlights of these experiences include:

- Providing headquarters and administrative services for local and regional organizations.
- Consultation with small businesses and organizations on issues such as technological resources, staff and leadership development, long and short range planning, fiscal management, and goals development.
- Creating business plans for small businesses
- Developing resources for boards of directors. These include a board training program, a series of publications covering all topics of board participation, management and responsibility, and the distribution of a weekly e-mail bulletin focusing on topics of interest to association leaders.
- Developing a manual for all aspects of a health care volunteer program managed by a volunteer staff

B. Membership services

Leipper Management has a history of engaging people in activities, events, and organizations. This history includes:

- Recruiting a volunteer committee which assisted in the design and presentation of a series of educational programs for a professional association. This committee was the first to develop a booklet outlining the programs for the entire year. It was the first to utilize all committee members in the introduction and presentation of the programs. It was the first to take the experiences of the members themselves and present them in creative and unique formats that involved everyone, provided great learning opportunities, and was fun.
- Creating and supporting a volunteer team to assist in planning and presenting five events for up to 1200 people in a variety of venues from the show stage at a Reno casino to winter sports event at a ski area in the Sierras.
- Successfully involving high school students in extracurricular activities such as amateur radio, music and sports programs.
- Coordinating the most successful response to a major disaster (Loma Prieta Earthquake) to date for the local Red Cross Chapter. This involved recruiting, training, and supervising over 100 volunteers.
- Designing, developing and managing the most successful exhibit center to date for the Association for Volunteer Administration International Conference. We doubled the number of vendors participating, included the most new vendors of any previous exhibit center and it was the first to make a profit in many years.
- Creating and managing a health care volunteer program that successfully involved a diverse group of over 500 volunteers from all socio-economic backgrounds, ethnic origins, and physical abilities. This included developing volunteer teams to manage programs such as the neonatal volunteer program.

Leipper Management has developed a wide range of support materials designed to encourage and support member involvement. These include:

- Board materials such as board member handbooks, position descriptions, and bylaws.
- Membership applications, dues renewal, and information update forms.
- Custom membership directories that are designed to be a resource to members and include more than just names and addresses of members.
- Membership Development and Recognition ideas booklet
- Roberts Rules for Small Groups - A collection of Leipper Management bulletins focusing on key elements of Robert's Rules as they relate to small organizations and boards.

C. Meeting and event planning experiences

Leipper Management has provided management services for events covering attendance from tens to thousands with the focus on a range of themes from child abuse to entrepreneurial activity to association management. The scope of the services provided range from full service to filling in on specific tasks to complement (and manage) a volunteer workforce. Examples of these Leipper Management supported events and activities include the following.



The Annual Child Abuse and Neglect Prevention Task Force Conference - a statewide annual conference for professionals and others in the child welfare field. Leipper Management has worked with this event since its inception in 2000 and has seen the event grow in participation and support in the past three years.

Innovation, Invention, and Entrepreneurship for School Teachers - a graduate level course for public school teachers including preparation to assist students in applying for the Lemelson Education and Assistance Program's Young Inventor Scholarship. This course was conducted by the University of Nevada, Reno and supported by the efforts of Leipper Management and the Nevada Small Business Development Center.

The August Symposium for Association Leadership - Conducted in partnership with the Truckee Meadows Community College, our support on this full day symposium was full scope and even included presentations.

Fact or Myth: The diversification of Nevada's economy through technological innovation - The Nevada Innovation, Technology, and Entrepreneur Council's Spring Conference featuring the presentation of the Nevada Inventor of the Year.

Swing for the Fences - a seminar on seed investing for entrepreneurs sponsored by the National Association of State Venture Funds.

International Conference on Volunteer Administration service as a member of the steering committee and in the capacity of Exhibits Registrar. Developed database of vendor information, designed reports, documents, contracts, brochures, and other materials related to the solicitation, recruitment, and management of vendors. Created procedure manual for exhibits.

Designed, planned, organized, and carried out five major council-wide (state) events for the Sierra Nevada Girl Scout Council focusing on five different areas of interest including a variety entertainment show, winter sports, and health and fitness. These were held in four different locations of Northern Nevada. Average attendance at these events was 1200 children and adults.

As President-Elect of the Northern California Association of Directors of Volunteer Services, created an education committee to plan and implement the quarterly programs for the year. Set up the initial planning meeting, designed the worksheets, committee responsibilities, calendar and ideas summary that were included in a packet given to each committee member. Compiled the results of the survey on the educational programs and created a report which was also included in the packet. Designed and created the booklet outlining the programs for the year. Designed and disbursed a registration flyer for each meeting. Designed a satisfaction survey for each meeting and an overall survey for the year. Supported the committee to ensure all preparations were carried out for each meeting. Designed a reimbursement form to document expenditures

- Participated at a national convention of the National Education Association as a the president of a local chapter.
- Serving on the planning committee for the California Hospital Association Directors Coordinating Conference for two years. Duties included assisting in the development of the program agenda and format, the theme, the determination of presenters, the amenities including menus, special events, and resources.
- Serving on the planning committee of Directors of Volunteers in Agencies for several annual local volunteer recognition programs. Assisted in site selection, and program development. Managed mailing lists and created attendance RSVP lists.
- Serving on the planning committee for the 1983 National Association of Social Workers conference. Provided clerical support, developed presenter and attendee databases. Designed reports, name tags, mailing labels, registration lists and participant information.
- Participation in a variety of capacities for a wide range of community events and activities including an annual volunteer recognition event, Special Olympics, diabetic camp, service club fundraisers, and Junior Achievement.

D. Data and information management and related services

The foundation of member communications and organizational health is its store of reliable data formed into useful information. The core data contains the contact information for members that facilitates necessary membership communication. This core is surrounded by layers containing knowledge of the organization's associates and market and the transaction information for dues payments, sales, and other matters. A coherent and complete schema for this data encourages its use for member services and organizational growth.

1. data sharing

The value for data comes from its use in meaningful ways. The means and mechanisms for doing this have been undergoing great change in recent years from index cards to personal computer software to shared network methods. Leipper Management maintains the expertise to facilitate transfer and sharing of data to meet a variety of purposes and needs for nonprofit associations.

For example, a directory can be a laborious effort in laying out each page and entry to prepare for publication. Alternatively, the directory may be a database report only requiring a small amount of touch up work for direct to press methods.

2. data completeness and structure

Many times different committees or organizational departments keep their own records customized for their particular needs. Membership keeps a name and dues payment information. Newsletters keeps a list of names and addresses that may or may not coincide with the membership list. Publications keeps a record of accounts and payment information. Special publications, such as directories, may maintain a list of individuals with company information and other directory specific information.

A coherent approach allows all departments to use the same basic database. Accounting can find all payments made by an individual or firm for various purposes. Marketing can analyze the data to find trends and patterns. Anyone who gets an address update will benefit all who use that address. This approach requires planning and careful design so that all benefit and the organization functions at greater efficiency.

3. *the internet and intra-networks*

The growth of internet technologies is making it possible for even small organizations to efficiently consider intra-networking as a means to communicate over a large regional area. It is possible to have people in different parts of the world access an organizational database and E-mail system as if they were on a local network with others in their organization. These technologies can improve communication and coordination in geographically distributed work groups.

4. *web technology*

The web has become an important communications tool for many associations. Most of the important issues related to this technology have been clarified and the significant side effects revealed. The technology has advanced from leading edge to the commodity level. Practice and policy norms are becoming visible.

Leipper Management provides web presence host side services for our clients whose level of activity does not really support the budget needed for a standalone web site - associations whose other alternative would be a donated hosting service and a volunteer's web design product.

We intend this web presence to benefit not only our company but to also benefit our clients. As a web host for our clients, we are invested in the quality and success of the effort. By sharing resources, folding current efforts to a new medium, sponsorship, and keeping it simple, we can provide a web site and e-mail address for clients without requiring any significant investment. These services are a part of our standard business contract.

Sharing resources means using our domain name and hosting service. It means that we can use the broader interest in our web site to help those interested in the association find out about the association and it means we can use interests in the association to help communicate who we are and what we do.

Folding current efforts means that we will export documents we prepare for the association for fax or mail to a web compatible format and place them in the the association area with appropriate referencing.

Keeping it simple means that we will provide clean and simple document layouts without fancy or proprietary formatting, forms, animation, or other gimmicks.

5. *appropriate use of technology*

Pie in the sky is good for dreams, but practical, proven technology is what is needed to make things work. Leipper Management makes appropriate use of technology for its client associations.

E. Organization Development

The Coheridy Project was formed to foster mission focused leaders who inspire and transform superior learning organizations through an expression of a coherent identity. Assessment tools, mentoring, coaching, and leadership are used to develop an organization that will learn the message in its mission as an ongoing fundamental value behind all of its activities and decisions.

1. *Assessment tools*

Leipper Management assists in the development and proper use of assessment tools to provide usable feedback for growth. The strength is in the ability of these tools to obtain objective data subject to effective analysis. That analysis must be connected to specific actions that can be expressed in an accountable manner.

2. *Mentoring and coaching*

Whether it is a springboard for thinking through ideas, a stimulus for new ideas and new directions, or specific assistance in solving some problem, Leipper Management provides experience for mentoring and coaching to meet those one on one needs.

3. *Leadership development*

Leadership is a skill and a talent and a relationship. It is developed by acquiring knowledge, practicing skills, and working through problems over time. Leipper Management augments its mentoring and coaching with publications and training beyond that required for an immediate need or specific organization.

4. *The Coherent Identity*

It is the mission of the organization that should be the referent for measuring its actions. Leipper Management assists organizations to create and accountability trail between its assessments, development programs, and other activities back to its mission and purpose.

5. *Developing habits for continuous learning and development of the organization*

Growth requires change and is necessary to even maintain the livelihood of an organization. Change must be built into the structure, policies, values, and attitude of the organization. The alternative is decay. Leipper Management can assist organizations in a broad spectrum of methods and techniques to implement programs for change. From online course management systems to effective board retreats to individual consultation, the organization can learn to make its growth and development an ongoing habit.

IV. *Volunteer service on boards and committees*

American Society Directors of Volunteer Services - Regional Membership Representative, member of the Legislative Sub-Committee

Northern California Association Directors of Volunteer Services - education committee, Board of Directors Legislative Chair, Board of Directors President-Elect/Education Committee Chair.

California Hospital Association - Directors Coordinating Council conference planning committee

Association for Volunteer Administration - Exhibits Registrar for the 1994 International Conference on Volunteer Administration, member regional nominating committee, Conference Scholarship Committee member 2001, Conference Scholarship Committee chair 2002, 2003, 2004.

International Association for Volunteer Effort - Member, North American Region Steering Committee

National Education Association - President of local chapter

Directors of Volunteers in Agencies - Planning committee annual local volunteer recognition program

Crisis Call Line - Volunteer, officer on the Board of Directors, trainer

Career College of Northern Nevada - Member, Advisory Board

Saint Mary's Hospice of Northern Nevada - Council member

Sparks Optimist - Secretary

Lemmon Valley Home Owners Association - Secretary, President



Reno/Sparks Chamber of Commerce - Member, Special Events Council, Education Council, Small Business Development Council

Center for Employment and Training - Member Advisory Board

National Association of Social Workers, Nevada Chapter - Member, conference planning committee

Washoe Medical Center - Member, Government Affairs Committee

United Way - Member, committee on volunteerism

Participated on the committee for the development of the *Nevada State Office on Volunteerism*

Completed BoardWalk, an educational program for non-profit board members sponsored by United Way.

Wally Byam Caravan Club International communications committee and local unit development

Notes

Hints and Tips for the Association Director

Creating a budget is creating a plan. A budget describes the activities and expectations of the association. Creating a useful and competent budget is one of the primary responsibilities of the association board of directors. Here are some hints and tips to help a director be an effective member of the team creating the association budget.

TANSTAAFL

As science fiction writer Robert Heinlein put it "there ain't no such thing as a free lunch." Associations depend upon volunteers and other contributions. Know the value of these contributions and never take them for granted. Be suspicious of anything that appears to be 'free' and account for its real costs and know its contributors.

Know who has the risk

Risk always exists and insurance to cover risk is always in the price. Know who has what risk in your budget items and how they influence the costs of those items. The risks include meeting income goals, establishing quantities or participation levels, establishing service quality levels, planning for contingencies, and accomodating last minute changes or requirements. The cost of risk can be managed by direct payment, by averaging over several activities, by averaging over time, or by other means.

Everything's negotiable

Communication is the key. Work with your vendors and suppliers with the focus on what needs to be done. Use their expertise to help you find the most effective way to get the job done by choosing where and how and when effort and expense is most needed.

Set guidelines and goals, not constraints.

Know what is really important to achieve and define this as a goal in a way that is as independent as possible from how it is to be achieved. Use what you think might be the best way to do something as a means to estimate a cost but do not let this planning constrain the actual accomplishment of the budget item.

Depend upon expertise and knowledge

You never know what something is going to cost until after its all done. The best guess about what it will cost will be from someone who has done it before the way you like to have it done. For most activities an association undertakes, what was done before is never exactly the same as what will happen in the future. Expertise can never provide an exact cost. So there is always a risk in setting a budget. You minimize this risk by using expertise, experience, and careful consideration of goals and expectations.

Win/Win breeds better success

Focus on getting the job done so that all team members profit from their participation.

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your association headquarters



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Education, management and information services especially for small businesses and associations