

**MANAGEMENT AND STARTUP
CONSULTING SERVICES**

2010

COPEN & LIND
CONSULTING

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Management and Startup Consulting Services

Copen & Lind Consulting offers management consulting for all phases of the startup of new organizations and for the revitalization of established organizations. Working with the organization's representative(s), a Scope of Engagement is created to address and prioritize the specific areas and concerns. The consultants then work closely with the organization's board, director, and/or staff to identify and implement the agreed upon objectives. These services can include, but are not limited to:

- Organizational startups and startup plans
- General organizational management and development
- Organizational needs assessments
- Technical needs assessments and capital plans
- Facility needs assessments
- National and regional executive director and other staff searches
- Short- and Long-range planning
- Equipment, facility, and new technologies planning
- Public and government relations planning
- Outreach and community collaborations planning and materials development
- Funding stabilization or increase strategizing
- Performance Management Agreement development or revision
- RFP development
- Organizational governance structure revision
- Board development and retreat facilitation
- Training program assessment and curriculum development
- Operating and capital budgets development and review

- Document development and review such as: bylaw, 501(c)(3) application, rules and procedures, and forms
- Staff development and reorganization
- Job description development, evaluation and revision
- Volunteer development and retention planning
- Operational tracking development and revision
- Operations management software selection
- Coaching and advising Directors on staff relations and other management issues
- Organizational, board and/or staff issues mediation
- Interim executive director services

In addition to management consulting Copen & Lind provide the following:

- Facility site searches and feasibility studies with cost estimations
- Facility design and renovation which include preparation and presentation of full plan sets and renovation specifications, contractor bidding and negotiation, renovation contract negotiation and renovation oversight
- Full equipment selection, bidding and integration for new facilities or upgrades for existing facilities
- Engineering services which include periodic site visits, telephone support and advising on technical needs, replacement and upgrade
- Computer, networking, Ethernet and phone system selection, integration and upgrades
- I-Net utilization design, planning and equipment selection and integration
- Development and negotiation of agreements and contracts such as Performance Management Agreements, Employment Contracts, Buy/Sell Agreements, Lease Agreements, Contractor/Renovation Contracts, RFP Development and Fiscal Agent Agreements
- Community ascertainments in preparation for franchise renewal which includes renewal, planning, interviews, focus groups, questionnaires, phone surveys, mail-in surveys and web-based surveys