



Management Concepts, Inc.

World Headquarters :

605 Poole Drive
Garner, NC 27529

Regional Office :

106 Knotline Road
New Bern, NC 28562

Charlene Barbour: President and CEO

Charlene B. Barbour is president and CEO of Management Concepts, Inc., which she founded in 1986. Mrs. Barbour has experience in association management from 1979 and has worked with more than thirty associations, societies, commissions, foundations, and licensing boards during these years. She also serves on a number of private business and public Boards. cbarbour@mgmt4u.com



Our History:

Management Concepts was incorporated in December of 1986 for the purpose of offering associations, societies, commissions, foundations, and licensing boards a quality resource for professional management services.

Management Concepts, Inc. has provided professional services for more than thirty entities since 1986.

Management Concepts, Inc. has experienced continuous positive growth and serves as a partner in representing clients who choose MCI for services. Our philosophy is that each client deserves and receives individual attention. We place the highest priority on serving our clients' needs and promoting their success.

Management Concepts, Inc. clients have experienced financial growth and stability through good sound fiscal planning. In addition, program enhancement created membership expansion and increased public awareness.

Company services:

Membership Database Management
Convention/Meeting Planning & Management
Show/Exhibition Management
Web Design and Management
Press and Consumer Relations
Government Relations
Public Relations
Publications

The expertise of our professionals and their desire to become an extension of the association management team uniquely qualifies our firm to assist these organizations in obtaining their goals. Ongoing staff enrichment programs have contributed to our stable management team.

Our affiliation with our clients is an important and prestigious partnership.

Management Concepts Inc.

Management Services:

Meeting Convention Planning:

- Research meeting sites
- Negotiate hotel contracts/services
- Visit meeting site to ensure facilities are appropriate for client needs
- Assist officers with program
- Develop meeting promotion
- Mail promotion & registration materials
- Assist officers in marketing of meeting
- Process phone/email inquiries from members and registrants
- Arrange faculty travel & lodging accommodation
- Arrangement of speaker AV requirements
- Assist officers in development of meeting budget
- Process online/email database registrations/confirmations
- Provide secure automated/online fee processing along with check deposits
- Compute Continuing Education credit hours
- Review/Coordinate hotel spec sheets with hotel staff concerning meeting requirements (breaks, lunches, meeting room set-ups, AV, etc...)
- Provide certificates of attendance
- Send e-mail blasts
- Provide necessary staff for meeting
- Provide professional name badges for meeting registrants & faculty
- Develop & assemble registration packets
- Review hotel bill with hotel accounting office

Public Relations Marketing:

- Public relations & marketing campaigns tailored to the specific organization
- Research market trends affecting the organization
- Research additional membership markets
- Develop media list for press releases
- Develop a press release campaign and schedule
- Create marketing brochures

Board Meetings:

- Provide meeting notices, agenda, & necessary back-up
- Type minutes and distribute per board instructions
- Provide necessary staff at meeting
- Negotiate meeting site
- Meeting arrangements
- Coordinate Board travel arrangements

Dues Invoicing & Membership Update:

- Update & maintain computer database
- Prepare & mail dues invoices
- Process invoices & payments
- Mail renewal thank you letters
- Answer membership calls

Membership Directory:

- Gather current information on members
- Coordinate/negotiate bids with printers

Clerical:

- Provide necessary office staff to handle general correspondence

Financial:

- Process income payments
- Maintain income d-base
- Code income payments for accountant
- Assemble financial materials for accountant
- Review & pay association bills
- Maintain checkbook including account coding of all payments
- Review financial statements
- Mail financial statements to directed officers

•Financial(continued):

Assist officers in budget preparation

- Provide investment counseling for association's finances via Certified Financial Planner

Coordinator:

- A coordinator/account manager will be provided to oversee all aspects of account

Newsletter and Publications:

- Edit, publish and distribute all necessary bulletins, newsletters, and communications

Telephone:

- Conference call capabilities, Voice mailbox

Mail Services:

- Incoming mail is delivered directly to Central Office at:605 Poole Dr., Garner, NC, 27529
- Mail is opened and processed daily
- Overnight, expedited services as needed

Internet Capabilities:

- Webmaster available to develop/maintain web site

Trade Show/Exhibition Management:

- Develop theme
- Negotiate/secure site
- Prepare exhibitor's prospectus and mail list
- Promotion
- Computerized and Online Registration
- Onsite staff for coordination and registration

Government Relations:

- Experienced consultants available for consultation

Management Concepts Inc.

Professional Services :

Your organization has direct access to the following professionals for consultation on an as-needed basis:

- Accounting Firm
- Legal Services
- Financial Executives
- Certified Financial Planner
- Travel Agent
- Computer Consulting
- Web Consulting

Accounting : Management Concepts, Inc., uses accounting firms who are well versed in association activities and law. These individuals are available to MCI clients for reference.

Legal Services: Steve Simpson, Attorney at Law, a long standing Raleigh attorney, provides legal counsel to MCI clients. He specializes in tax exempt organizations and works extensively in the association arena and is available for an hourly fee.

Financial Institution: North State Bank offers MCI clients no service charge banking and pays basis points above going rates on all CD's. Judy Stephenson, 1st VP and City Executive has 30+ years in banking and shares her expertise with MCI clients. Mrs. Stephenson is available to receive calls from board members and will lend advice as requested.

Certified Financial Planning: Edward D. Jones, Inc. offers MCI clients conservative investment services ranging from CD's, stocks to mutual funds. All investments of any kind for MCI clients are approved by the board or authorizing agent(s).

Computer Consulting: MCI has staff professionals who are well versed in computer operations, programs and equipment. Web site design and maintenance is available for a fee at MCI.

Travel Services: Association representatives who book flights with AAA receive free door-to-door insurance coverage, not on the plane.

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Computer Technology: MCI clients experience the versatility of the networked PC computer system. Current services include: desktop publishing, spread sheets, member and event database and slide presentation capabilities. All units are networked to provide all individuals who contact the Central Office with a speedy retrieval of information.

Telephone Long Distance Service: MCI clients are served by Alltel, and billed on one-sixth minute increments allowing associations to receive a cost-effective long distance service. Telephone calling cards are provided for all board and committee members.

Professional Affiliations: MCI staff members belong to ASAE and AENC. This professional association network allows us to study the current trends in continuing education, membership services, communications and management for associations.

Additional Support Staff: MCI continually uses all resources of existing staff during peak times. This allows all projects to be completed efficiently.

Outsourcing: A great advantage to the client is the ability to outsource client projects for cost effectiveness. This allows staff members to devote their time to project management.

Our Commitment:

Management Concepts' primary objective is to provide quality, value-added, professional association management services for the associations, societies, foundations, and licensing boards we represent. Our approach is to design creative, flexible programs as we develop and maintain personal interest and involvement tailored for each client.



At Management Concepts, Inc., our philosophy is that each client deserves and receives individual attention. We are committed to providing our clients with personalized service year-after-year. We place the highest priority on serving our clients' needs and promoting their success.

We believe the future will bring increasing demands on the volunteers of the association community, therefore, increasing the need for professional association management services. Management Concepts, Inc. provides professionals to satisfy the needs of the day-to-day tasks involved with the operation of associations, societies, foundations, and licensing boards. This creates additional time for volunteers to develop policy and make decisions in the best interest of their organization.

The expertise of our professionals and their desire to become an extension of the association volunteer management team uniquely qualifies our firm to assist your organization in obtaining your goals

Our affiliation with our clients is an important and prestigious partnership.

Why Use Management Concepts, Inc.:

Highly effective associations employ the services of a reputable association management firm accredited by the American Society of Association Executives (ASAE) to oversee all aspects of executive and administrative management. The staff person assigned to represent your account may be involved with the following tasks:

Executive Management by definition, entails all aspects of program and employee management for the association. This normally includes working with the officers and committee chairs to ensure quality and service to the membership of the organization represented.

Membership Development is an ongoing task of the executive director. The thrust of this task is to continually work with the membership chair in development of membership programs, membership marketing ideas, and fulfilling the needs of existing members. Often assessments are necessary to accurately determine the needs and expectations of members of associations.

Meeting/Convention Planning is a very important aspect of the executive director's position. These events, in most organizations, are the primary reason members belong. Education and camaraderie are critical ingredients in the cohesiveness of any association membership. Successful meetings should provide these opportunities for the members. Site selection, program development, and overall direction on meeting development are an important assignment of an executive director.

Public Relations Programs which are developed by associations through the PR Committee members, are often how colleagues and the public perceive an association or profession. Executive Directors are crucial in the guidance they offer their association. Public Relations is often disregarded as something that is "not so important" to association boards. In truth, public relations is the most significant tool in expressing the purpose of the organization to constituents and the public.



Communication Services are viewed by an executive director as the first line of service members often see in an association. Because members of dues-paying associations are often fastidious, open and proper communication is a delicate matter and should be presented properly. Communications of any type, whether it be concerning new programs, existing programs, meetings, or future plans must be communicated in proper form to the members of associations. An executive director is trained in correct communication tools.

Financial Management may be viewed by association boards as a personal matter among themselves. The assistance of an executive director, who will do research on opportunities available for solid investment, and one who continually maintains fiduciary responsibility to its board, is one asset with no price tag. Executive directors are versed and trained in avenues of investment and the types of accounts which best serve the tax-exempt market. All employees at MCI are bonded.

Marketing your association is an ongoing process and should never stop. An executive director will guide an association in opportunities to market membership as well as introduce new avenues to market the association to the public. Often, this overlaps with public relations; however, one can benefit the other.

General clerical duties are part of the solid foundation contributing to the success of any association. Programs are developed and implemented, but strong support staff members are critical in the day-to-day operations of your association. The executive director will guide, direct, and monitor the daily activities of your secondary and support team. This is also important to committees and board members in relation to their ongoing projects.

Facilities:

Management Concepts, Inc. primary office is located at 605 Poole Drive, in Garner, North Carolina. This location provides convenient access to Raleigh-Durham International Airport just twenty minutes away as well as immediate access to I-40 and downtown Raleigh, the Capital and Legislative offices just 10 minutes away.

The Raleigh-Durham area was voted by **Fortune Magazine** as being the #1 city for businesses.

In addition, Raleigh-Durham has been tapped by **Money Magazine** as the #1 area to live.

Equipment:

- Networked PC system
- Laser Writers
- High Speed Copier
- Plain Paper Fax Machine
- Postage Meter Machine
- Binding Machine
- Lucent Technology Telephone/Voicemail System

Software:

- FileMaker Pro
- PageMaker
- Quickbooks Pro
- IC Verify (Credit-Card Processing Software)
- Microsoft Word
- Microsoft Excel
- Microsoft Publisher
- Microsoft Powerpoint

MCI has desktop publishing capabilities with in-house printing done on the high-speed copier (black ink only). More advanced printing projects for our clients are obtained from outside printers through the bid process.

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Primary contacts :

Charlene Barbour

President & CEO

Telephone: + 1 919-779-7516

FAX: + 1 919-779-5642

E-mail: cbarbour@mgmt4u.com