

## Minutes of the ATD Tulsa Chapter Board Meeting

Monday, April 1, 2019

3:30 p.m. to 5:00 p.m.

This meeting was held at Matrix Service Company – 5100 E Skelly Drive, Suite 100 (Meridian Tower)

### **Call to Order**

President Walt Hansmann called the meeting to order at 3:47 p.m.

### **Roll Call**

Walt Hansmann, CPLP, President  
Linda Jenkins, Past President  
Lewana Harris, President-Elect  
Stacy Davis, CPLP, VP of Programming  
Kim Boggs, VP of Marketing  
Ashley Whitfield, VP of Membership

### **Absent**

Skip Eller, VP of Finance (Excused)  
Michael Chancey, VP of Administration (Excused)

6 of 8 board members were present. A quorum was established.

### **Approval of the Agenda**

Kim moved, Lewana seconded approval of the agenda. MOTION CARRIED.

### **Approval of the Minutes of Previous Meetings**

We did not have the minutes from the February 25 Board Meeting.

### **Financial Report**

Linda moved, Kim seconded acceptance of the treasurer's report. MOTION CARRIED.

### **Professional Development**

Stacy provided the results of the monthly program surveys for the January, February and March meetings.

Stacy provided RFPs for the May, July, August, September, and November monthly programs.

- A. May 10, 2019 – Jim Whitt – *Purpose-Driven Leadership* (date and room change required). The board decided not to change dates for the May meeting. Jim Whitt will present at our scheduled meeting May 17,
- B. July 19, 2019 -- Christy Vincent – *Three Vital Questions You Can Use to Empower Your Clients, Peers, and Yourself to Stop Living in the Dreaded Drama Triangle*. The board accepted the proposal.
- C. August 16, 2019 – Grace Judson – *Negotiation for Nice People – Achieve Your Goals and Strengthen Your Relationships*. The board accepted the proposal.
- D. September 20, 2019 – Amie Harr – *LLean In: Strengthening Your Organization's Culture One Intentional Conversation at a Time*. The board accepted the proposal.
- E. November 15, 2019 – Randy Anderson – Handling Conflict? Mr. Anderson is requesting reimbursement for travel from Texas. The board did not accept this proposal. Stacy will approach another local facilitator with whom she has been discussing a proposal.

## Minutes of the ATD Tulsa Chapter Board Meeting

Monday, April 1, 2019

3:30 p.m. to 5:00 p.m.

For the April program, Cathy Fox will be ordering from Ti Amo's. Ashley is preparing nametags.

Walt will prepare and send the PowerPoint for review prior to the meeting.

Kristine Sexter's workshop is Friday, April 26 at the Manhattan Construction training room.

### Communication

The deadline for the April newsletter is Tuesday, April 16. The featured board member will be Linda Jenkins.

### State Conference

The State Conference dates are October 24 and 25.

Linda moved, Kim seconded to accept the proposal option 1 from Bob Pike, and to accept the Gerald Jones option from Kirkpatrick. MOTION CARRIED.

### Tentative Agenda:

#### Pre-Con: Thursday, October 24

2:00 – 5:00 p.m. **Bob Pike** – 3-hour preconference workshop: ***Should You Be A Consultant? –And, if you are - How Do You Take Your Consulting Business to the Next Level?***

5:00 – 7:00 p.m. Networking Event

#### Conference: Friday, October 25

8:00 – 8:30 a.m. Registration and Coffee

8:30 a.m. - 12:00 p.m. Half Day Morning Session: **Bob Pike - *Results-Based Creative Learning Strategies: 27 Ways to Get Greater Results from Your Training – Faster, Better, Easier***

12:00 – 1:00 p.m. Lunch Break - Thank You's and Panel Q&A with Bob and Jim

1:00 – 4:00 p.m. Half-Day Afternoon Session: **Jim Kirkpatrick - *Getting to Kirkpatrick® Levels 3 and 4: Creating Believable Value Presentation*** (3-hours)

### New Business

- A. Help Make Oklahoma a Top Talent Destination – April 2, 4 – 6 pm Cyntergy (Cynthia Stewart, EverMore Services)

### Adjournment

The meeting was adjourned at 5:30 p.m.

Respectfully submitted by Walt Hansmann, CPLP

Date & Time: Monday, April 1, 2019 from 3:30 PM to 5:00 PM

Location: Matrix Service Company – 5100 E Skelly Drive, Suite 100 (Meridian Tower)

1. Call Meeting to Order
  - a. Roll Call – Michael Chancey
  - b. Confirm Quorum – Declare if Quorum is or is not Present – Michael Chancey
  - c. Agenda for April 1<sup>st</sup> Board Meeting – **Review and Approve** – Walt Hansmann
  
2. Administrative
  - a. Minutes from February 25, 2019 Meeting – **Review and Approve** – Michael Chancey
  - b. Bylaws and Policies Committee Next Meeting Date and Location – Michael Chancey
  
3. Financial
  - a. Financial Reports for January to-date – **Review and Accept** – Skip Eller
  - b. Kristin Wise Power Membership Payment – Skip Eller
  
4. Membership
  - a. Membership Report for March 2019 – **Review & Accept** – Ashley Whitfield
  - b. New Member Event – Ashley Whitfield
  
5. Professional Development
  - a. January Program Evaluation Results
  - b. February Program Evaluation Results
  - c. March Program Evaluation Results
  - d. RFPs Review and Approval:
    - i. May 10, 2019 – Jim Whitt – *Purpose-Driven Leadership* (date and room change required)
    - ii. June 21, 2019 – *ICE Insiders* (already planned)
    - iii. July 19, 2019 -- Christy Vincent – *Three Vital Questions You Can Use to Empower Your Clients, Peers, and Yourself to Stop Living in the Dreaded Dream Triangle*
    - iv. August 16, 2019 – Grace Judson – *Negotiation for Nice People – Achieve Your Goals and Strengthen Your Relationships*
    - v. September 20, 2019 – Amie Harr – *LLean In: Strengthening Your Organization’s Culture One Intentional Conversation at a Time*
    - vi. November 15, 2019 – Randy Anderson – *Handling Conflict?*
    - vii. December 6, 2019 – *Trainer Throwdown* (already planned)
  - e. Programming Scheduled –
    - i. Upcoming Program: April 12 –
    - ii. Content & Logistics – Stacy Davis
    - iii. Accommodations: Team Effort
      1. Meal – Meal & Room @ OSU-Tulsa Room 140 – Stacy and Cathy ordering; Ashley doing nametags
      2. Check In – Skip and Michael
    - iv. Board Member Attendance & Participation

- v. Board Communications for Attendees:
    - 1. Opening Welcome – Walt Hansmann
    - 2. Check-In to Program Meeting on Facebook – Kim Boggs
    - 3. Tweet During Meeting – Kim Boggs
    - 4. Welcome Guests – Ashley Whitfield
    - 5. Acknowledge New Members and Power Members and Power Member Minute (**Need to Identify Power Member to Provide (Kim Boggs?)**) – Ashley Whitfield
    - 6. ATD 2019 ICE Team Pitch – Linda Jenkins
    - 7. Sponsor Pitch for 2019 Programs – Lewana Harris
    - 8. Pitch for Future Programs – Stacy Davis
  - vi. Program – Alan Vanderburg – Change Using Simple Process Improvement – Stacy Davis
  - vii. At end of Program:
    - 1. Guest Presenter Thank You – Stacy Davis
    - 2. Door Prizes – Stacy Davis & Walt Hansmann
  - viii. Post April Meeting Evaluation Online Distribution by Tuesday, April 16, 2019
  - f. eLearning SIG (Special Interest Group)
    - i. Date/Location for 1<sup>st</sup> Quarter eLearning SIG (looking for host) – Stacy Davis - Kim Boggs
  - e. April 26<sup>th</sup> Workshop – Kristine Sexter – Location: Manhattan Construction, (Need Lunch Sponsor)
  - f. Dave Delaney - *The Master Communicator's Secret Weapon* (webinar)
6. Communications
- a. April Newsletter deadline for articles – Tuesday, April 16.
7. State Conference Planning Report
- a. Dates: October 24-25
  - b. Location: TBD
  - c. Kirkpatrick Proposal – **Review and Approve** – Walt Hansmann
  - d. Pike Proposal – **Review and Approve** – Walt Hansmann
  - e. Conference Budget – **Review and Accept** – Skip Eller
  - f. Planning Questions
8. Old Business
9. New Business
- a. Help Make Oklahoma a Top Talent Destination – April 2, 4 – 6 pm Cynergy (Cynthia Stewart, EverMore Services)
10. Confirm Action Items – Michael Chancey and Walt Hansmann
11. Next Board Meeting: Monday, May 6 – 3:30-5:00 PM @ Matrix
12. Adjourn Meeting – Walt Hansmann

Association for Talent Development Tulsa Chapter

2019 Budget/Income Statement (As of 02/01/2019)

Category Description	2018 Actuals	2019 Budget	01/01/19 - 01/31/19	2019 Year To Date	VARIANCE	Special Notes	FY19 Notes
<b>INCOME</b>							
ATD CHIP	1,237.27	500.00	9.76	9.76	-490.24	Total Rec'd in January 2019 = \$69.76	Variable - Using 2 year Average
Meeting Fees	8,130.00	7,920.00	1,140.00	1,140.00	-6,780.00		12 Meetings (see Meeting Income Worksheet)
Membership Dues	4,214.00	5,000.00	860.00	860.00	-4,140.00		115 @ \$50 standard memberships; 6 @ \$25 student
Local Dues Received from ATD Website	0.00	0.00	60.00	60.00	0.00	Received January 2019	
ATD Meeting Sponsorship	1,000.00	1,000.00	500.00	500.00	-500.00	Linda Jenkins (June, December 2019)	7 Regular Meeting Sponsorships (\$250 each)
ATD Newsletter Sponsorship	0.00	0.00	100.00	100.00	100.00	Tracy Spears	
Special Event - Training	5,840.00	3,000.00	0.00	0.00	-3,000.00		One Special Event
Special Event - State Conference	0.00	14,500.00	0.00	0.00	-14,500.00		
Special Event- State Conference Sponsorships	0.00	8,000.00	0.00	0.00	-8,000.00		
<b>TOTAL INCOME</b>	<b>20,421.27</b>	<b>39,920.00</b>	<b>2,669.76</b>	<b>2,669.76</b>			
<b>EXPENSES</b>							
<b>Board Expense</b>							
National ATD Dues	1,341.00	358.00	129.00	129.00	229.00		2 Dues paid as requested
Retreat	53.05	100.00	66.14	66.14	33.86	WalMart for Groceries	
ATD Leader's Conference	3,346.00	3,500.00	0.00	0.00	3,500.00		1 Registrations, 3 Hotel Rooms, 3 Airfares, & Meals - Note: Linda and Walt are planning to submit proposals to present workshops at ALC. Presenters receive free registration to ALC (\$150 each). If their proposals are accepted, propose to send them + 1 additional board member to ALC.
Treasurer Expense	347.70	400.00	0.00	0.00	400.00		Stamps, Envelopes, Accounting Expenses
Annual Audit	0.00	1,000.00	0.00	0.00	1,000.00		Annual Financial Audit
<b>TOTAL Board Expense</b>	<b>5,087.75</b>	<b>5,358.00</b>	<b>195.14</b>	<b>195.14</b>			
<b>Communications Expense</b>							
GoDaddy Domains	80.68	100.00	0.00	0.00	100.00		Web Domains (Annual Expense)
Go Daddy Standard SSL	0.00		0.00	0.00	0.00		Next Due 03/17/19 (\$140)
Go Daddy Email	501.48	525.00	0.00	0.00	525.00		New Email Purchase (\$501.48 renew 2018, 2021; \$120 renew 2020)
Wild Apricot Web Site	1,536.00	1,600.00	0.00	0.00	1,600.00		Annual Expense - Next Due 04/27/18
Survey Monkey	408.00	425.00	0.00	0.00	425.00		Approved expense up to \$425.00 (annual)
PO Box Subscription	70.00	75.00	0.00	0.00	75.00		Annual Expense - Due Each February
Marketing	0.00	250.00	0.00	0.00	250.00		Printing / Mailing Costs for Special Meeting or Communcation
<b>TOTAL Communications Expense</b>	<b>2,596.16</b>	<b>2,975.00</b>	<b>0.00</b>	<b>0.00</b>			
<b>Meeting Expense</b>							
Facility Charge	915.00	870.00	0.00	0.00	870.00		10 @ \$70 (OSU in Room 140); 2 @ 85 (OSU in BS Roberts Room)
Meals-Food	5,981.58	5,200.00	596.98	596.98	4,603.02	\$1010 Received - \$596.98 Food - \$70 Room Charge = \$343.02	384 (32 attend/month avg.) @ \$17/month average (+20 attend for special event + \$500)
ATD December Special Program	0.00	0.00	0.00	0.00	0.00		Moved to Recognition Items
Recognition Items	246.02	750.00	0.00	0.00	750.00		See separate "Recognition Items Budget" tab for breakdown
<b>TOTAL Meeting Expense</b>	<b>7,142.60</b>	<b>6,820.00</b>	<b>596.98</b>	<b>596.98</b>			
<b>Membership Expense</b>							
New Member Marketing	0.00	450.00	0.00	0.00	450.00		New Member Welcome Kits
New Member Appreciation	158.60	660.00	0.00	0.00	660.00		(40@16.50) New Member Lunches
<b>TOTAL Membership Expense</b>	<b>158.60</b>	<b>1,110.00</b>					
<b>Misc. Expenses</b>							
Paypal Expense	490.86	850.00	71.92	71.92	778.08		High in 2017 due to conference
Oklahoma ATD State Conference	1,000.00	20,000.00	0.00	0.00	20,000.00		In-Kind Sponsorship to OKC State Conference Note: Gentleperson's agreement to provide host chapter with \$1,000 "sponsorship" check
Other Special Event Expense	1,237.98	1,500.00	0.00	0.00	1,500.00		Moved to "Recognition Items" under "Meeting Expense" above
Insurance	992.55	1,300.00	0.00	0.00	1,300.00		Due March (Note: In 2017 paid: \$460.12 to Willis of MD, and \$500 to Hartford)
Scholarship Program (pending approval)	0.00	0.00	0.00	0.00	0.00		Scholarship Program pending policy approval
<b>TOTAL Misc Expense</b>	<b>3,721.39</b>	<b>23,650.00</b>	<b>71.92</b>	<b>71.92</b>			
<b>TOTAL EXPENSES</b>	<b>18,706.50</b>	<b>39,913.00</b>	<b>864.04</b>	<b>864.04</b>			
<b>OVERALL TOTAL</b>	<b>1,714.77</b>	<b>7.00</b>	<b>1,805.72</b>	<b>1,805.72</b>			

Paypal Fees as of 06/01/17: 2.2% + .30 for online transactions. 2.7% per card swipe, 3.5% + .15 for manual key

**ATD Tulsa Chapter  
Statement of Financial Position as of 02/01/2019**

<b>Assets</b>		<b>Liabilities</b>	
Checking	\$ 12,995.65	Accounts Payable	\$ -
PayPal	\$ 5,640.67	Taxes Payable	\$ -
Cash	\$ 170.00	<b>Total Liabilities</b>	<u>\$ -</u>
Accounts Receivable	\$ 865.00	<b>Net Assets</b>	
(Less doubtful accounts)*	\$ (685.00)	Unrestricted Net Assets	\$ 18,986.32
		Temporarily Restricted Net Assets	\$ -
		Permanently Restricted Net Assets	\$ -
<b>Total Cash Assets</b>	<u>\$ 18,806.32</u>	<b>Total Net Assets</b>	<u>\$ 18,986.32</u>
<b>Total Assets</b>	<u>\$ 18,986.32</u>	<b>Total Liabilities Plus Net Assets</b>	<u>\$ 18,986.32</u>

\*Doubtful Accounts are greater than 90 days old with Unknown Status

ATD Oklahoma 2019 State Conference Preliminary Proposed Budget

**Estimated Income**

Registration Category	Fee	Estimated Registrations	
Power Members Early-Bird Friday through September 30	\$149.00	15	\$2,235.00
Power Members Regular Registration Friday October 1-15:	\$199.00	10	\$1,990.00
Power Member Early-Bird Half-Day: \$89 (either morning or afternoon)	\$89.00	3	\$267.00
Power Member Regular Registration Half-Day: \$139 (either morning or afternoon)	\$139.00	2	\$278.00
Chapter Members Early-Bird Registration Friday through September 30	\$199.00	25	\$4,975.00
Chapter Members Regular Registration Friday	\$249.00	15	\$3,735.00
Chapter Member Early-Bird Half-Day: \$139 (either morning or afternoon)	\$139.00	3	\$417.00
Chapter Member Regular Registration Half-Day: \$189 (either morning or afternoon)	\$189.00	2	\$378.00
Guests Early-Bird Registration Friday	\$249.00	10	\$2,490.00
Guests Regular Registration Friday	\$299.00	20	\$5,980.00
Guests Early-Bird Half-Day: \$189 (either morning or afternoon)	\$189.00	3	\$567.00
Guests Regular Registration Half-Day: \$239 (either morning or afternoon)	\$239.00	2	\$478.00
Unemployed / Student / Volunteers Friday	\$109.00	5	\$545.00
Pre-conference	\$99.00	25	\$2,475.00
Networking Event	\$0.00		\$0.00
			\$26,810.00
Sponsorships/Ads			\$5,000.00
			\$31,810.00

Registration Summary		
Full Conference Registrations	100	\$21,950.00
Half Day Registrations	15	\$2,385.00
Pre-conference Registrations	25	\$2,475.00
		\$26,810.00

**Estimated Expenses**

Bob Pike: \$2,500 + travel expenses for both programs	(2,500.00)
Jim Kirkpatrick: \$3,999 + travel expenses	(3,999.00)
Travel estimate: Air fares \$1000	(1,000.00)
Hotel Sleeping Rooms estimate: \$500 (hope to get this comped or sponsored). (Estimate speaker expenses = \$7,999)	(500.00)
Thursday facility rental expense:	(200.00)
Thursday networking event:	(450.00)
Friday facility expense:	(1,500.00)
Friday lunch expense: 115 @ \$25	(2,875.00)
Friday coffee and snack service expense:	(800.00)
Conference swag expense:	(500.00)
Door prize gifts: (thought: include a registration to 2020 state conference)	
Presenter gift expenses:	(100.00)
Audiovisual expenses:	(2,500.00)
Printing:	
Name badges:	(100.00)
Misc:	
	(17,024.00)
Estimated Profit/Loss	\$14,786.00

**ATD TULSA 2018 PROGRAMS  
WORKSHOP PROPOSAL FORM**

**Workshop Information**

1. **Name/Title/Credentials:** Jim Whitt, Founding Partner, Purpose Unlimited
  
2. **Workshop Title:**  
The Transformational Power of Purpose: Finding & Fulfilling Your Purpose in Life
  
3. **Describe How Your Workshop Fits our Program Objective (Theme):** The discovery of an individual's purpose is the key to intrinsic motivation and self-actualization.

Per the ATD Competency Model, relevant topics include:

<i>Areas of Expertise</i>	
1. <b>Change Management</b>	2. <b>Coaching</b>
3. Evaluating Learning Impact	4. Instructional Design
5. <b>Integrated Talent Management</b>	6. Knowledge Management
7. Learning Technologies	8. Managing Learning Programs
9. <b>Performance Improvement</b>	10. Training Delivery
<i>Foundational Competencies</i>	
1. Business Skills	2. <b>Interpersonal Skills</b>
3. Global Mindset	4. <b>Personal Skills</b>
5. Industry Knowledge	6. Technology Literacy

4. **Describe How Your Workshop Contributes to the Professional Development of ATD Tulsa Program Attendees:** This program arms attendees with a process that transforms lives, leaders and organizations.
  
5. **Workshop Description:** Any animal can be trained using reward (the carrot) and punishment (the stick). Purpose is the only motive that engages the human spirit and empowers us to rise above our animal natures to become intrinsically motivated. Learn how the power of purpose transforms lives, leaders and organizations.
  
6. **Target Audience and Level:** All levels
  
7. **Learning Objectives:** After participating in this workshop, participants will be able to:
  - a. Understand that what we have been taught about motivation is really manipulation. We have been trained like animals to respond to the extrinsic stimuli of reward and punishment which holds us captive to our needs and fears.
  
  - b. Understand that we are the only animals that seek meaning for our existence and that meaning is found in the fulfillment of each individual's singularly unique purpose. We have unique talents and abilities that enable us to fulfill our purpose in all aspects of our lives.
  
  - c. Understand that actively engaging in the fulfillment of an individual's purpose liberates the human spirit and results in intrinsic motivation. This transformational process empowers us to fulfill our own unique potential.



8. **Workshop Design Plan:**

My outline will follow the Learning Objectives listed above.

9. **Handout / Performance Tools:**

No handouts. But I will be using a technology that will allow attendees to interact during the presentation.

10. **AV and / or Room Configuration Requirements:**

Please note: The workshop room will be equipped with a desktop computer, projector, screen, and microphone (if needed). Additional AV or configuration needs, including internet access or computer audio projection, must be noted in your proposal.

11. **Evidence of Professional Qualifications and Credentials:**

See biography.

**Demonstration of Presenter Ability:**

A. See biography.

B. [www.purposeunlimited.com](http://www.purposeunlimited.com)

12. **Biography:**

It was the discovery of his purpose on March 21, 1988 – to help people reach their full potential – that transformed Jim Whitt’s life. The discovery of his purpose was the catalyst that launched his career as a writer, speaker, business consultant and film producer. Having personally experienced the transformational power of purpose, he developed a process to help others do the same. That process is the topic of a book, *The Transformational Power of Purpose: Finding and Fulfilling Your Purpose in Life*, and is available in an online course.

As a business consultant Jim developed a purpose-based approach to leadership and organizational development. That approach is the topic of another of his books, *Riding for the Brand: The Power of Purposeful Leadership*.

Jim’s background and education have provided him with a unique perspective in the field of personal and organizational development. He grew up working on farms, ranches and feedlots, earned a degree in animal science at Oklahoma State University and spent a dozen years in sales and marketing with two Fortune 500 companies.

He views motivation and leadership from three perspectives – scientific, psychological and spiritual – which are summarized in his fundamental principle of human behavior – without a purpose our only motivation is reward and punishment.

Jim has taken his message of purpose in life and business to audiences around the world as a keynote speaker. His presentations are highly interactive and highly entertaining.

13. **Professional References:**

See biography.

14. **Professional Photo:**

[Attached to email.](#)

**ATD TULSA 2019 PROGRAMS  
WORKSHOP PROPOSAL FORM**

**Workshop Information**

1. **Name/Title/Credentials:***(to appear in promotional/marketing materials):*  
*Christy Vincent, Ph.D.*
2. **Workshop Title:** *Three Vital Questions You Can Use to Empower Your Clients, Peers, and Yourself to Stop Living in the Dreaded Drama Triangle*
3. **Describe How Your Workshop Fits our Program Objective (Theme):** *To advance ATD’s mission to “empower professionals to develop talent in the workplace”. 100 words or less*

*This workshop addresses three specific Areas of Expertise: change management, coaching, and instructional design. The information provided in the workshop will help attendees as they conduct formal and informal coaching and as they engage in instructional design on topics such as communication, change management, and conflict management. The workshop speaks to the Foundational Competencies of Interpersonal Skills and Personal Skills in that it provides a social model of human interaction that can be used both as a lens to understand the behavior of others and as a lever to help others to change their way of relating to others in the workplace.*

Per the ATD Competency Model, relevant topics include:

<i>Areas of Expertise</i>	
1. Change Management	2. Coaching
3. Evaluating Learning Impact	4. Instructional Design
5. Integrated Talent Management	6. Knowledge Management
7. Learning Technologies	8. Managing Learning Programs
9. Performance Improvement	10. Training Delivery
<i>Foundational Competencies</i>	
1. Business Skills	2. Interpersonal Skills
3. Global Mindset	4. Personal Skills
5. Industry Knowledge	6. Technology Literacy

**Describe How Your Workshop Contributes to the Professional Development of ATD Tulsa Program Attendees:** *One of our biggest challenges as we develop talent is to help others to engage in self-reflection, recognize their own contribution to problems, become “unstuck” in their thinking or behavior, and to grow as people. Dealing with humans is a messy proposition. This workshop will help attendees to increase their Personal and Interpersonal Skills by exploring a social model called the Dreaded Drama Triangle (DDT). The model helps us understand destructive interactions and negative thought patterns. In the session we will learn some practical tips and language to use to help our clients, peers, and ourselves avoid the DDT and to engage in empowered thinking.*

4. **Workshop Description:** 200 words or less

*We have all likely utilized the drama triangle of Victim, Persecutor, and Rescuer as a model when helping our clients or trainees to avoid destructive interpersonal interactions. Stephen Karpman popularized the social model in the 1970's when he studied under Eric Berne. The model, often called the Dreaded Drama Triangle (DDT), can help us understand the negative roles that our clients engage in as they interact with others. The downside of the model is that it lacks guidance on how to help our clients move away from the DDT other than saying, "Stop being a Victim." As you may know, that phrase usually reinforces Victim mentality and puts you in the role of a Persecutor. We can all use some practical tips and some new language to help our clients, peers, and ourselves engage in empowered thinking and behaving rather than in dramatic, repetitive, destructive patterns. In this workshop, drawing on the work of David Emerald and Donna Zajonc, two OD professionals, we will learn about three vital questions you can ask to eliminate the negative roles of Victim, Persecutor, and Rescuer and to take on different, more empowered roles such as the Creator, Challenger, and Coach.*

*It should be written in a format that will help us market your workshop to program attendees.*

5. **Target Audience and Level:** (intermediate – middle level or advanced – senior level.)

6. **Learning Objectives:** 300 words or less

After participating in this workshop, participants will be able to:

- Discuss the thinking and behaving patterns of people engaging in the roles of the Dreaded Drama Triangle—Victim, Persecutor and Rescuer.
- Explain how these DDT roles contribute to negative interpersonal interactions and to repetitive patterns of relating.
- List alternate, more empowering roles people can take in their interactions—the Creator, Challenger and Coach.
- Contrast and compare the negative roles and the empowered roles.
- State the three vital questions that they can ask others to encourage them to think about the outcomes they want, their way of relating to others, and the actions they will take to reach their desired outcomes.

7. **Workshop Design Plan:**

Include a workshop outline with timeframes and delivery methods for all activities. Each workshop timeframe is 60 minutes including time for questions and answers.

12:10 – 12:15	Introduction
12:15 – 12:25	Mini-lecture on the Dreaded Drama Triangle
12:25 – 12:40	Small group discussions about the thoughts and behaviors of individuals who take on the role of Victim, Persecutor, and Rescuer
12:40 – 12:50	Mini-lecture on the alternative roles of Creator, Challenger, and Coach
12:50 – 1:00	Small group discussions about the differences between the models and the ways they can incorporate the new roles in their work with clients

1:00 – 1:10	Mini-lecture on the three vital questions that they can ask to help keep clients in the Creator, Challenger, and Coach roles
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8. **Handout / Performance Tools:**

*Each participant will receive a relatively detailed handout with the information being covered in the presentation along with resources where they can learn more on their own.*

9. **AV and / or Room Configuration Requirements:**

*I prefer for the room to be set up in pods, if possible. If not, I can work with any configuration. I will be showing some slides with my presentation. No need for internet access or audio projection.*

10. **Evidence of Professional Qualifications and Credentials:**

See attached resume

11. **Demonstration of Presenter Ability:**

A. I have attached a letter from the director of The Health Policy Fellowship, a group that prepares medical professionals for increasing leadership roles in the field of public policy.

B. You may see my TEDxUCO talk and my Disrupt HR talk on my Web site at [www.christyvincent.com](http://www.christyvincent.com)

12. **Biography:** 300 words or less per speaker

*Dr. Christy Vincent is a Professor in the Mass Communication Department at the University of Central Oklahoma where she teaches organizational and strategic communication courses. Her research interests include conflict management, mediation, change management, executive coaching, and training and development. Her interest in conflict management led her to the Straus Institute for Dispute Resolution at the Pepperdine University School of Law where she earned a Certificate in Alternative Dispute Resolution (ADR). She has received the Vanderford Engagement Award, College of Liberal Arts Outstanding Teaching Award, Vanderford Distinguished Teaching Award and the prestigious Neely Award for Teaching Excellence at UCO.*

*Christy is a communication specialist. Using her years of experience in organizational effectiveness and conflict management, she coaches professionals to increase their leadership effectiveness. Christy helps her clients improve in essential behaviors such as managing time, setting priorities, uncovering values, working through conflict, coping with stress, and managing multiple roles. As an organizational effectiveness consultant, Dr. Vincent helps groups and organizations with strategic planning, conflict management, communication needs assessment, problem-solving and leadership development. She regularly conducts training courses for local corporations including Chesapeake Energy, The City of Oklahoma City, Allegiance Credit Union, and Metro Technology Centers.*

*She holds a Doctor of Philosophy degree (Ph.D.) from the University of Oklahoma, a Master of Arts degree (M.A.) from the University of Houston, both in communication, and a*

*Bachelor of Science degree (B.S.) in mass communication from Oklahoma Christian University.*

**13. Professional References:**

- Courtney Tisdale, Industrial Coordinator, Economic Development Center, Metro Technology Centers, 405-595-4784, [Courtney.tisdale@metrotech.edu](mailto:Courtney.tisdale@metrotech.edu)
- Amy Downs, CEO, Allegiance Credit Union, 405-642-2435, [amy.downs@acuok.org](mailto:amy.downs@acuok.org)
- Cary Williams, Director, Educators' Leadership Academy, 405-974-3922, [cwilliams56@uco.edu](mailto:cwilliams56@uco.edu)

**14. Professional Photo:**

Submit a professional color headshot photo of the presenter(s) in JPEG format.

*For workshop promotional/marketing materials*

**ATD TULSA 2018 PROGRAMS  
WORKSHOP PROPOSAL FORM**

**Workshop Information**

1. **Name/Title/Credentials:***(to appear in promotional/marketing materials):* Grace Judson
2. **Workshop Title:** Negotiation for Nice People: achieve your goals and strengthen your relationships.

The workshop title should fit with workshop themes outlined.

3. **Describe How Your Workshop Fits our Program Objective (Theme):** To advance ATD’s mission to “empower professionals to develop talent in the workplace”. 100 words or less

Negotiation is tough for almost everyone, especially since it incorporates at least some aspect of conflict. Yet it’s also a key skill for professional success.

This topic fits into the Areas of Expertise #s 1, 2, 5, 6, 8, and 9, and into Foundational Competencies #s 1, 2, 3, and 4.

Per the ATD Competency Model, relevant topics include:

<i>Areas of Expertise</i>	
1. Change Management	2. Coaching
3. Evaluating Learning Impact	4. Instructional Design
5. Integrated Talent Management	6. Knowledge Management
7. Learning Technologies	8. Managing Learning Programs
9. Performance Improvement	10. Training Delivery
<i>Foundational Competencies</i>	
1. Business Skills	2. Interpersonal Skills
3. Global Mindset	4. Personal Skills
5. Industry Knowledge	6. Technology Literacy

4. **Describe How Your Workshop Contributes to the Professional Development of ATD Tulsa Program Attendees:** 100 words or less

I believe this is covered in my response to #3, above.

5. **Workshop Description:** 200 words or less

*It should be written in a format that will help us market your workshop to program attendees.*

You’d rather compromise than risk damaging important relationships.

You’re frustrated because people don’t respond when you ask for what you want.

You’d really like to be able to achieve your goals without being viewed as demanding, pushy, or tough.

And you’d love to walk into tough business negotiations feeling calm, confident, and prepared for whatever might happen.

In this session, participants will

- ◆ Discover the relevance of professional empathy in tough negotiations
- ◆ Realize why traditional negotiation practices often lead to dissatisfaction on all sides
- ◆ Learn new tools for empathetic understanding and their application to negotiation
- ◆ Become a better negotiator than you ever expected – without damaging your relationships

6. **Target Audience and Level:** (novice – entry level, intermediate – middle level or advanced – senior level.)

This is relevant for all levels.

7. **Learning Objectives:** 300 words or less

State at least three (3) Learning Objectives for the proposed workshop. Each objective should specifically indicate the results and outcomes you seek in terms of participants' knowledge, skills, and behavior. For each objective, use the format: “After participating in this workshop, participants will be able to...”

After attending this workshop, participants will

- ◆ Discover the relevance of professional empathy in tough negotiations
- ◆ Realize why traditional negotiation practices often lead to dissatisfaction on all sides
- ◆ Learn new tools for empathetic understanding and their application to negotiation
- ◆ Become a better negotiator than you ever expected – without damaging your relationships

8. **Workshop Design Plan:**

Include a workshop outline with timeframes and delivery methods for all activities. Each workshop timeframe is 60 minutes including time for questions and answers.

This program is a combination of presentation intermingled with Q&A as the participants interact with the material. I’m flexible and highly interactive in my style, so creating a timeframe for this material isn’t relevant.

9. **Handout / Performance Tools:**

Include a title and description of each handout or item that will be given to participants.

There is no handout for this program.

10. **AV and / or Room Configuration Requirements:**

Please note: The workshop room will be equipped with a desktop computer, projector, screen, and microphone (if needed). Additional AV or configuration needs, including internet access or computer audio projection, must be noted in your proposal.

No special requirements.

11. **Evidence of Professional Qualifications and Credentials:** 300 words or less

Include relevant education, Professional Certifications, personal and professional awards and/or commendations received personally or as a “key player” in the organization for

specific project(s). Include your public speaking experience(s), listing similar presentations with particulars about when, where, size of audience, subject, etc. You may attach a resume for further elaboration.

**My speaking and teaching experience includes**

- National Council for Marketing & Public Relations (keynote at the District 6 Annual Conference)
- The Global Campus, University of Arkansas
- University of California, San Diego (UCSD) – Faculty and Staff Programs
- UCSD Extension, Career and Life Stages Seminars
- Mira Costa Community College, Community Outreach Programs
- The Association for Talent Development (ATD), San Diego (annual conference breakout)
- The Association for Talent Development (ATD), Northwest Arkansas chapter (multiple presentations)
- The Project Management Institute (PMI), San Diego (annual conference breakout)
- The Project Management Institute (PMI), Northwest Arkansas chapter (multiple presentations)
- Northwest Arkansas BizCon
- Businesswomen’s Conference, Rogers, Arkansas
- The Self-Employment Telesummit (2010 and 2011)
- National Association of Women Business Owners (multiple chapters)
- Genentech Professional Women’s Group, Oceanside, California
- Women in Teradata, San Diego, California
- Women in Technology International (WITI), San Diego
- Transplace Leaders’ Forum, Lowell, Arkansas
- Benchmark Group, Rogers, Arkansas
- Arvest Investing in Women, Rogers, Arkansas
- American Businesswomen’s Association (ABWA) (multiple chapters)
- The Carlsbad, California Chamber of Commerce
- The Greater Bentonville, Arkansas Chamber of Commerce

**12. Demonstration of Presenter Ability:**

- A. Provide evaluation results from a past presentation on that demonstrates your style and ability. Preferred evaluation results will include content related to the proposed workshop topic.

Previously submitted.



- B. *Optional* – Provide a link or video attachment of you presenting that demonstrates your style and ability. Preferred videos will include content related to the proposed topic.

<https://www.gracejudson.com/speaking> - there's a video of a 13-minute presentation I gave at a recent symposium at the Fayetteville, Arkansas public library.

<https://www.gracejudson.com/a2z> - this is a series of brief videos where each letter of the alphabet is used to illustrate a key leadership quality.

13. **Biography:** 300 words or less per speaker

Grace Judson is a leadership coach and consultant focusing on first-line and recently-promoted managers and supervisors, helping them cross that daunting gap between being *part* of a team, and *leading* a team.

Drawing on her 25 years of corporate experience – including 16 years of executive leadership – plus 13 years of leadership coaching, Grace works with individuals, teams, and leaders to develop their skills, helping them become the empowered leaders they want to be – and their teams deserve.

She points out that she's not as old as all those years of experience might indicate. After all, she started her career as a two-year-old, turning her parents' faces toward each other when they argued, wanting them to *see* each other instead of fighting. That was the beginning of her lifelong quest to understand what makes people tick – and what makes a good, or even great, leader.

14. **Professional References:**

Provide the names, addresses, telephone numbers and email addresses of three (3) references, specifying the context in which the references know you and are familiar with your skills as a workshop presenter or speaker. Please ensure that each is aware he/she may be contacted for feedback on the primary speaker's presentation style and technique. Note: If you have presented at ATD Tulsa in the past, please provide the date and topic in addition, to the three references requested above.

Ashley Ingram, Transplace – [ashley.ingram@transplace.com](mailto:ashley.ingram@transplace.com); (479) 770-7441; Transplace, 509 Enterprise Dr., Lowell, AR

Ashley is the current President of the Northwest Arkansas ATD chapter. I've spoken several times for the chapter, and she also recommended that I come to speak on Change Leadership (the topic I'm proposing to your chapter) for the Transplace Leaders' Forum, which I did last month.

Michele Love, Marketing & Talent Development Manager, Benchmark Group – [lml@teamofchoice.com](mailto:lml@teamofchoice.com); (479) 636-5004; Benchmark Group, 1805 N. 2<sup>nd</sup> St., Rogers, AR

Michele is a member of the Northwest Arkansas ATD chapter and, based on her experience with my presentations there, invited me to come speak to the Benchmark leadership team on Change Leadership

Dr. Becky Paneitz, Founder & CEO, Inseitz Group – [beckypaneitz@inseitzgroup.com](mailto:beckypaneitz@inseitzgroup.com); (479) 586-8704; Inseitz Group, 1200 W. Walnut St., Rogers, AR

Dr. Paneitz is the previous President of Northwest Arkansas Community College, and currently leads her own consulting and women’s empowerment organization. She has heard me speak several times at various functions.

15. **Professional Photo:**

Previously submitted.

Submit a professional color headshot photo of the presenter(s) in JPEG format.

*For workshop promotional/marketing materials*

**ATD TULSA 2019 PROGRAMS  
WORKSHOP PROPOSAL FORM**

**Workshop Information**

1. **Name/Title/Credentials:***(to appear in promotional/marketing materials):*  
*Amie Haar, Coordinator of Training & Development; Facilitator, Trainer, and Nationally Certified Gallup Strengths Coach*
2. **Workshop Title:** *Lean In: Strengthening Your Organization’s Culture One Intentional Conversation at a Time*
3. **Describe How Your Workshop Fits our Program Objective (Theme):** *To advance ATD’s mission to “empower professionals to develop talent in the workplace”. Both science and experience tell us that organizational culture makes a HUGE impact on employees and their engagement. How long they stay, how productive they are, and how well they connect with our customers/clients are all impacted. This workshop will explore concrete strategies to strengthen culture through regular conversation, providing attendees with the opportunity to develop talent in a way many overlook.*

Per the ATD Competency Model, relevant topics include:

<i>Areas of Expertise</i>	
1. Change Management	2. Coaching
3. Evaluating Learning Impact	4. Instructional Design
5. Integrated Talent Management	6. Knowledge Management
7. Learning Technologies	8. Managing Learning Programs
9. Performance Improvement	10. Training Delivery
<i>Foundational Competencies</i>	
1. Business Skills	2. Interpersonal Skills
3. Global Mindset	4. Personal Skills
5. Industry Knowledge	6. Technology Literacy

4. **Describe How Your Workshop Contributes to the Professional Development of ATD Tulsa Program Attendees:** *“Lean In” contributes to the professional development of attendees by providing them not only with the tools, but also real-life opportunities to practice shifting the ways in which they hold conversation – be it in training, coaching, mentoring, facilitating, etc. these important pieces will allow both awareness and growth in the way of day-to-day conversation.*
5. **Workshop Description:**  
*How much do we potentially miss by looking at conversations through our own lens? How could we transform the way we do business by practicing to lean in and truly listen? By laying down our own agendas and biases, asking the right questions and creating a space that cultivates potential and positivity, we will more quickly uncover the creativity and uniqueness each individual brings and walk alongside them as they grow into their true selves.*
6. **Target Audience and Level:** *(novice – entry level, intermediate – middle level or advanced – senior level.) Appropriate for all levels.*

7. **Learning Objectives:** 300 words or less

- a. ***Walking away from bias and agendas when going into a conversation:*** After participating in this workshop, participants will be able to understand themselves at a deeper level, and have the ability to take note when they are moving into a place of “old ways” or “sameness”
- b. ***Asking more intentional questions and seeking first to understand:*** After participating in this workshop, participants will be able to create a list for themselves of open-ended, intentional questions that work best for their own personal style, as well as pausing to understand rather than listening only to answer
- c. ***Creating a space that cultivates potential and positivity:*** After participating in this workshop, participants will be able to understand the importance of, and have the tools/concepts available to create a space of potential and positivity, and open dialogue, rather than stifling creativity and shutting down conversation even before it happens.

8. **Workshop Design Plan:**

Include a workshop outline with timeframes and delivery methods for all activities. Each workshop timeframe is 60 minutes including time for questions and answers.

- a. *Intro – 3 minutes (video/interactive activity)*
- b. *Anecdotal Example – 3 minutes (instructor-led)*
- c. *Walking away from bias/agendas – 5 minutes*
- d. *Activity – 7 minutes (individual, then discussion)*
- e. *Asking intentional questions – 5 minutes (instructor-led)*
- f. *Activity – 13 minutes (partners, then discussion)*
- g. *Creating a space of potential and positivity – 7 minutes*
- h. *Group discussion – 10 minutes (group)*
- i. *Closing – 2 minutes (instructor-led)*
- j. *Q&A – 5 minutes (group)*

9. **Handout / Performance Tools:**

- a. *Lean In – notes handout (follow-along with presentation)*
- b. *Intentional Questions (list of intentional questions to choose from)*

10. **AV and / or Room Configuration Requirements:**

Please note: The workshop room will be equipped with a **desktop computer, projector, screen, and microphone (if needed)**. Additional AV or configuration needs, including **internet access** or **computer audio projection**, must be noted in your proposal.

11. **Evidence of Professional Qualifications and Credentials:** 300 words or less

- Coordinator of Training & Development, Human Resources (2 ½ Years)
- Strengths Coaching Sessions
  - Individual – more than 60
  - Team – more than 20
  - Manager – more than 20
- Public presentations
  - OSUF Staff Retreat (160 individuals)
  - Team Strengths Session, OSU Alumni Association (25 individuals)
  - Lean In Presentation, Meridian Technology (50+ individuals)
  - Team Strengths and Big Living, OCU Alpha Phi (70+ individuals)
  - Understanding Strengths, OSU Foundation (25 individuals total)
  - Training the Trainer, OSU Foundation (several sessions, approx. 25 individuals total)
- Key player in (recent)
  - Developing individualized training plans for incoming new staff
  - Creating a language of “Strengths” for OSU Foundation as an organization
  - Developing overall training plan for OSU Foundation as an organization
  - Mentoring and coaching as a point of employee engagement
  - Coordinated more than 100 training sessions for OSUF staff

12. **Demonstration of Presenter Ability:**

- A. Provide evaluation results from a past presentation on that demonstrates your style and ability. Preferred evaluation results will include content related to the proposed workshop topic. *(SEE ATTACHED)*
- B. *Optional* – Provide a link or video attachment of you presenting that demonstrates your style and ability. Preferred videos will include content related to the proposed topic.

13. **Biography:** 300 words or less per speaker

*Amie Haar, Coordinator of Training & Development for the OSU Foundation*

*Amie is passionate about many things including her faith, her family, the power of a good belly laugh, and education. She believes strongly in helping others to find their true purpose, and does so by using tools such as Intentional Conversation, Continued Education & Learning, and the Gallup StrengthsFinder. She enjoys facilitating, coaching, writing strategy and mentoring while at the office, and outside of the office loves being with her husband Josh, her children Ava and Miles (and one on the way!), cracking open a new book, settling in for a good movie, and going on all kinds of new adventures.*

14. **Professional References:**

- **Lorinda Schrammel, Director, OSU Talent Development**

*106 Whitehurst | OSU Stillwater*

*405.744.2908 | [Lorinda.schrammel@okstate.edu](mailto:Lorinda.schrammel@okstate.edu)*

- **Pam Guthrie, Senior AVP, OSUF Human Resources**

*400 S. Monroe | OSUF Stillwater*

*405.385.5124 | [pguthrie@osugiving.com](mailto:pguthrie@osugiving.com)*

- **Rebecca Eastham, Executive Director of Business & Industry Services, Meridian Technology**

*1312 South Sangre Road | Meridian Technology Stillwater*

*45.377.3333 x. 310 | [rebecca@meridiantech.edu](mailto:rebecca@meridiantech.edu)*

15. **Professional Photo:**

Submit a professional color headshot photo of the presenter(s) in JPEG format.

SEE ATTACHED

**ATD TULSA 2019 PROGRAMS  
WORKSHOP PROPOSAL FORM**

**Workshop Information**

1. **Name/Title/Credentials:***(to appear in promotional/marketing materials):*  
**Randy Anderson   Independent Training Consultant   Certified Speaking Professional**

2. **Workshop Title:**  
 Can't we all just get along? – Conflict Resolution Without the Collateral Damage

3. **Describe How Your Workshop Fits our Program Objective (Theme):** Conflict is prevalent in today's workplace. Unresolved conflict will not only lead to lost productivity, but it can also become a hindrance to onboarding new employees effectively, and the overall training process. If grudges or animosity exist, it will limit the intake and application of new knowledge and decrease the retention of content delivered.

Per the ATD Competency Model, relevant topics include:

<i>Areas of Expertise</i>	
1. Change Management	2. Coaching
3. Evaluating Learning Impact	4. Instructional Design
5. Integrated Talent Management	6. Knowledge Management
7. Learning Technologies	8. Managing Learning Programs
9. Performance Improvement	10. Training Delivery
<i>Foundational Competencies</i>	
1. Business Skills	2. Interpersonal Skills
3. Global Mindset	4. Personal Skills
5. Industry Knowledge	6. Technology Literacy

4. **Describe How Your Workshop Contributes to the Professional Development of ATD Tulsa Program Attendees:** This presentation will equip attendees to effectively resolve conflict and help them understand how to create an atmosphere that minimize the likelihood of disagreements turning into contention.
5. **Workshop Description:** Do you find yourself having to play referee, psychologist, and parent to get others to "play well in the sandbox". Unlock the strategies you'll learn in this session to resolve conflict quickly and effectively. You'll also see how to help avoid conflict by creating a less contentious atmosphere that fosters more teamwork and customer service internally AND externally. Learn to facilitate a professional and constructive confrontation, allowing both parties to voice their opinion and hear the other person's perspective. Also learn to separate fact from feelings and determine root causes so you can eliminate the actual problem(s), not just symptoms.

6. **Target Audience and Level:** The strategies I teach in this presentation are fundamental ideas that will truly help anyone. I have presented this approach for Conflict Resolution to people at every level within organizations, and the overwhelming feedback has been that it is very applicable and easy to implement. Many people have searched so hard for the “latest best idea” that they have forgotten the basic mechanics that are most effective. This module delivers those in an engaging and easy to remember way.

7. **Learning Objectives:** 300 words or less

How to facilitate a professional and constructive confrontation, allowing both parties the chance to voice their opinion and hear the other person's (peoples') perspective.

How to separate fact from feelings and determine root causes so you can eliminate the actual problem(s), not just the symptoms.

How to create and foster an atmosphere that lessens the occurrence of conflict and proactively resolves it when it arises.

Discover the importance of constructive phrasing in order to open lines of communication while working to reduce or resolve conflict.

8. **Workshop Design Plan:**

This presentation is divided into xxx sections:

1) Identifying what conflict is, how it looks, where it can exist (within the workplace), and the side-affects that it causes so that we fully understand the risks it brings and the costs that may come with it. (approximately 10 mins)

2) We'll discuss 4 major considerations that will help you develop your best approach to resolve the conflict. (approximately 15 mins)

3) Next, I'll present 14 specific strategies that will directly effect the speed and effectiveness of resolving the conflict. (approximately 25 mins)

4) Finally, we'll end by focusing on 4 paradigms that will change the culture within your organization and help you to prevent conflict from escalating to an unproductive state. (approximately 10 mins)



9. **Handout / Performance Tools:**

Include a title and description of each handout or item that will be given to participants.

10. **AV and / or Room Configuration Requirements:**

Please note: The workshop room will be equipped with a desktop computer, projector, screen, and microphone (if needed). Additional AV or configuration needs, including internet access or computer audio projection, must be noted in your proposal.

11. **Evidence of Professional Qualifications and Credentials:** 300 words or less

Include relevant education, Professional Certifications, personal and professional awards and/or commendations received personally or as a “key player” in the organization for specific project(s). Include your public speaking experience(s), listing similar presentations with particulars about when, where, size of audience, subject, etc. You may attach a resume for further elaboration.

12. **Demonstration of Presenter Ability:**

- A. Provide evaluation results from a past presentation on that demonstrates your style and ability. Preferred evaluation results will include content related to the proposed workshop topic.
- B. *Optional* – Provide a link or video attachment of you presenting that demonstrates your style and ability. Preferred videos will include content related to the proposed topic.

13. **Biography:** 300 words or less per speaker

*To appear in workshop promotional/marketing materials*

14. **Professional References:**

Provide the names, addresses, telephone numbers and email addresses of three (3) references, specifying the context in which the references know you and are familiar with your skills as a workshop presenter or speaker. Please ensure that each is aware he/she may be contacted for feedback on the primary speaker’s presentation style and technique. Note: If you have presented at ATD Tulsa in the past, please provide the date and topic in addition, to the three references requested above.

15. **Professional Photo:**

Submit a professional color headshot photo of the presenter(s) in JPEG format.

*For workshop promotional/marketing materials*

## ATD Oklahoma State Conference Preliminary Plan

**Date:** Thursday October 24 and Friday, October 25

**Location:** TBD (would like to look at OSU Tulsa auditorium, River Spirit, Hardrock, Osage Hotel "downtown Tulsa", Southern Hills Marriott, Crowne Plaza Tulsa Southern Hills, and Wyndham Tulsa)

**Pre-Con:** Thursday, October 24

2:00 – 5:00 p.m. **Bob Pike** – 3-hour preconference workshop: ***Should You Be A Consultant? –And, if you are - How Do You Take Your Consulting Business to the Next Level?***

5:00 – 7:00 p.m. Networking Event

**Conference:** Friday, October 25

8:00 – 8:30 a.m. Registration and Coffee

8:30 a.m. - 12:00 p.m. Half Day Morning Session: **Bob Pike - *Results-Based Creative Learning Strategies: 27 Ways to Get Greater Results from Your Training – Faster, Better, Easier***

12:00 – 1:00 p.m. Lunch Break - Thank You's and Panel Q&A with Bob and Jim

1:00 – 4:00 p.m. Half-Day Afternoon Session: **Jim Kirkpatrick - *Getting to Kirkpatrick® Levels 3 and 4: Creating Believable Value Presentation*** (3-hours)

### **Expenses:**

- Bob Pike: \$2,500 + travel expenses for both programs
- Jim Kirkpatrick: \$3,999 + travel expenses
- Travel estimate: Air fares \$1000
- Hotel Sleeping Rooms estimate: \$500 (hope to get this comped or sponsored).
- Estimate speaker expenses = \$7,999.
- Thursday facility rental expense:
- Thursday networking event:
- Friday facility expense:
- Friday lunch expense:
- Friday coffee and snack service expense:
- Conference swag expense:
- Door prize gifts: (thought: include a registration to 2020 state conference)
- Presenter gift expenses:

- Audiovisual expenses:
- Printing:
- Name badges:
- Misc:
- What else?

**Estimate 201 attendees:**

Potential Registration Fees

\$149 - Power Members Early-Bird Friday through September 30:  $x 20 = \$2,980$

\$199 - Power Members Regular Registration Friday October 1-15:  $x 10 = \$1,990$

\$89 - Power Member Early-Bird Half-Day: \$89 (either morning or afternoon)  $x 5 = \$445$

\$139 - Power Member Regular Registration Half-Day: \$139 (either morning or afternoon)  $x 2 = \$278$

\$199 - Chapter Members Early-Bird Registration Friday through September 30:  $x 50 = \$9,950$

\$249 - Chapter Members Regular Registration Friday:  $x 40 = \$9,960$

\$139 - Chapter Member Early-Bird Half-Day: \$139 (either morning or afternoon)  $x 5 = \$695$

\$189 - Chapter Member Regular Registration Half-Day: \$189 (either morning or afternoon)  $x 2 = \$378$

\$249 - Guests Early-Bird Registration Friday:  $x 20 = \$4,980$

\$299 - Guests Regular Registration Friday:  $x 5 = \$1,495$

\$189 - Guests Early-Bird Half-Day: \$189 (either morning or afternoon)  $x 5 = \$945$

\$239 - Guests Regular Registration Half-Day: \$239 (either morning or afternoon)  $x 2 = \$478$

\$99 - Unemployed / Student / Volunteers Friday:  $x 5 = \$495$

\$79 - Pre-conference only:  $x 30 = \$2,370$

Estimated registration revenue = \$37,349

## Historical:

2017 Registration Fees (when Tulsa Hosted):

Member- Early-bird \$149

Member- Regular Registration \$179

Member- at-the-door registration \$209

Guest- Early-bird Registration \$179

Guest Regular Registration- \$209

Guest at-the-door Registration \$239

Unemployed / Student / Volunteers \$99

102 registrations, 97 check-ins – Revenue generated \$11,614

## Questions:

- Does anyone have contacts at any of the properties mentioned above?
- **Are these too many tiers for registration?** Should we just offer two tiers: early-bird and regular registration with regular registration matching the “at-the-door” fee for each of the three membership types? That cuts out 3 registration options (the regular rate).
- With these premium presenters, do we raise registration, or keep it at the same level as 2017?
- Does anyone have a copy of the ATD COC 2018 final report? (I have asked the president for one, and have not received it)
- Should the Thursday pre-conference always be an add-on registration cost, or should it ever be included in the full registration?
- Do we pursue HRCI for the two sessions? If so: who, how, what expense.
- If we use a hotel: negotiate comp sleeping rooms for Bob and Jim?
- Can we get support from ATD to promote regionally? (I know we can use our NAC and the NAC regional calls to get the word out.)
- Can we visit ATD COC, ATD Northwest Arkansas to promote conference? Other chapters? Dallas-area? K.C.?
- Should we invite our chapter relationship manager from ATD?
- Sponsorships:
  - I hear that Persimmon is interested in sponsoring the Thursday night networking event
  - Use the same levels we used in 2017?
  - Since there are no breakouts and less foot traffic between sessions, is it cost effective/practical to have booth sponsors?

- Should we pursue a lunch sponsor?
- Should we pursue a coffee and snacks sponsor(s)?
- How will this change our volunteer manpower assignments, since we have just two presenters and one large room?
- What else?

# Results-Based Creative Learning Strategies: 27 Ways to Get Greater Results from Your Training – Faster, Better, Easier

## Module 1. Getting Results from Training: The Performance Solutions Cube – and The Transfer of Training Strategy

Training is a process, not an event. Most programs are designed without ever considering the business result that is desired.

**A. Bob Pike's Performance Solution Cube™** -- Participants will examine 5 performance solutions other than training - and how to have a conversation that focuses on the results to be achieved.

**B. Transfer of Training Strategy** -- Participants, Managers, and Trainers can all impact the transfer of training. Participants will explore 27 practical strategies for ensuring the transfer of training - and pick specific strategies to apply to their own training programs.

**C. Scrap Learning** – Training that does not transfer is considered waste – or ‘scrap.’ Participants will explore how Scrap Learning can be measured and reduced using appropriate transfer of training strategies.

## Module 2. Getting to the C.O.R.E. of Training - Closers, Openers, Revisitors, and Energizers

**A. Most trainers don't close** -- they just run out of time. IN this module you'll learn the three tests of an effective close - the Closing ACT -- Action Planning, Celebration, and Tying things together. Throughout the program at least a dozen different ways to close will be modeled and you'll have the opportunity to adapt these to your own training programs.

**B. Openers** -- Most trainers don't open -- they just start dumping content. In this segment you'll experience the three keys of a powerful opener - raising the BAR -- Breaking preoccupation through involvement, Allowing time for networking, and being Relevant to the specific course content. You'll understand the difference between an icebreaker (which you will never use again) and an opener.

Throughout the class you will experience a dozen different ways to close -- and explore how to adapt them for your own content. You'll also identify the one thing 90% of all trainers do to end a program -- that should NEVER be done at the end of the program -- and why this same thing should be done at the BEGINNING of the program!

**C. Revisitors** -- One of the worst things a trainer can say is "Let's review". Yet Bob estimates that over 70% of the trainers he observes for clients will use that phrase. And it is a signal for participants to tune out because it's content that's already been covered. But just because you've said it, doesn't mean that they've learned it. We know from research that key learning points must be REVISITED at least 6 times to move from short-term memory to long-term memory.

Review is when the instructor says it again, REVISIT is when participants are engaged in the content again. More than 24 ways to revisit content will be modeled -- and you'll adapt at least five for your own training.

**D. Energizers** -- How do you get class energy back up when it lags -- and it will -- several times a day? Most trainers try talking faster or putting someone on the spot with a question. These don't work. Involvement and movement are the keys.

### **Module 3. Instructor-led-Participant-centered Models and How to Apply Them**

**A.** The Missing Link in the ADDIE Model -- How People Learn Most of our design efforts are focused on the content to be delivered – not the people it will be delivered to. Bob will share his research based on profiling 25,000 people in 14 countries on learning preferences – and how it impacts our training designs. You'll experience 3 scales – and the differences between 1. Participative Learners and Reflective Learners. 2. Practical Learners versus Informative Learners. And 3. Structured Learners and General Learners.

hey just run out of time. IN this module you'll learn the three tests of an effective close - the Closing ACT -- Action Planning, Celebration, and Tying things together. Throughout the program at least a dozen different ways to close will be modeled and you'll have the opportunity to adapt these to your own training programs.

**About Bob Pike CPLP Fellow, CSP,  
CPAE-Speakers Hall of Fame, MPCT**

## **Should You Be A Consultant? –And, if you are - How Do You Take Your Consulting Business to the Next Level?**

In this special session Bob will share the five questions to ask before you make the leap to external consulting. (And over half what he shares can apply to people who are internal!) And this can happen while you are still employed full-time. He'll share his journey from being a solo consultant to building a multimillion dollar training and consulting company – then selling it in 2013 – and continuing to work in his boutique consulting practice – because he loves what he does!

### **Module 1. 5 Questions to Ask Before You Make the Leap**

### **Module 2. 7 Ways to Build Visibility and Credibility as a Consultant**

1. Write – do you have a book? Bob will share a strategy for getting one written and in print in just 90 days. You'll also gain an article and blog post strategy.
2. Join – not just organizations, but also social networks. But which? And why? Bob will share his top 2 organizations to join (and ATD is one of them!) and the 4 social networks you want to be part of. More importantly – how do you engage and contribute on social networks without getting overwhelmed?
3. Serve – we join not to get, but to give. Where can you serve – and why does Bob have a goal of serving at least ten individuals per day?
4. Present – not just for a fee, but also for free. Bob will help you develop a list for both – and how he approaches them – as well as his top five places to present.
5. Endorse others – Bob will cover where, why, and how – and why this is so important.
6. Social Media – Bob covered connection – but this part is about marketing. He'll start with where and how to start on LinkedIn and Facebook.
7. Testimonials, Recommendations, and Reviews in step 6 we endorsed others. Now how do you get social proof for yourself? Bob will show you how!

### **Module 3. Taking Your Business to the Next Level**

1. **Do you have a practice or a business? Which do you want? Creating active versus passive income.**
2. 2 Ways to Multiply Yourself. – people and products. 6 ways to clone yourself with people 2 purposes of any product.
3. Bob's powerful content development process – for both marketing and delivery!
4. 12 Ways to Repurpose Any single piece of IP to build your business.
5. How Bob created his first book – and how he does it today (in 75% less time)!
6. Pricing – free to fee – and Bob's key question.
7. Value based versus time based pricing – a powerful case study.

### **Module 4: Writing a Million Dollar Proposal in Just 3 Hours!**

You get a phone call. A client wants a proposal by close of business today - just three hours from now. You are competing for a dream assignment with two other groups. Can you create a compelling proposal? In this session Bob will share the exact proposal process he has used in this session multiple times.

Included will be:

1. Why Bob uses the word "proposal" only once in the document -- and the power phrase that is used the rest of the time.



2. The three stages that must be part of the proposal process.
3. Why the document says: "Some of the identified..." rather than having a complete list.
4. Why the word "cost" is never used -- and what goes in its place.
5. The critical items that go immediately before and after the pricing information.
6. Why and where the word "authorized" must be used.
7. How to create a timeline and a narrative of work - and why they are critical.

Bob Pike Tulsa ATD October 2019 Agreement

**Bob Pike  
On-Site Program Delivery  
Letter of Agreement**

Bob Pike acknowledges his agreement with Tulsa ATD, for Bob Pike to present:

3 hour precon - **Should You Be A Consultant? –And, if you are - How Do You Take Your Consulting Business to the Next Level?** To be delivered the afternoon before the conference

**½ dayConference presentation (a.m.) - Results-Based Creative Learning Strategies: 27 Ways to Get Greater Results from Your Training – Faster, Better, Easier**

**Terms and Conditions:** All Fees are payable by check or credit card in US Dollars or wire transfer

**Program Fees:**

\_\_\_\_ Option 1 \$2500 for both programs (Plus travel expenses) A \$1250 nonrefundable deposit is due with this signed agreement.

\_\_\_\_ Option 2 \$1500 for both programs plus 50 percent of the gross revenue for the precon. A \$750 nonrefundable deposit is due with this signed agreement.

**Product Sales:** The chapter will provide a display table and volunteer support to display Bob's books and other products. The chapter will receive 20% of the revenue from all book and product sales.

**Sales and Marketing Support** - Bob Pike will provide emails scripts, a video sales letter, and other videos to support the marketing of both the precon and the conference session – this represents a \$2500 contribution at no charge to the chapter.

- **Expenses to include:**
  - Shipping costs for materials
  - Full coach airfare
  - Lodging on the club level, internet access, transportation, meals.
- **Airfare to be billed and paid for at time of booking flight.**
- **Balance of the program fees due on-site.**
- **P3 Associates must receive this signed agreement by March 31, 2019** to secure the dates and availability of Bob Pike for this event.
- Participant count is due on **September 21, 2019** CTT Press will provide copies of the workbook and collateral handouts for each session to be reproduced by Tulsa ATD. . CTT Press will provide all books and ancillary materials needed for each workshop.
- **Client agrees to complete logistics form** detailing hotel name, address, airport information, etc. on the Logistics Form provided.
- **Video or audio recording** of Bob Pike is prohibited except with prior written permission.

- **FORCE MAJEURE:** Neither party shall be liable for any failures or delays in performance due to circumstances beyond its control including, but limited to, acts of nature, acts of government, or delays in transportation.

Page 1

- **UNPAID UNDISPUTED INVOICES** will incur a finance charge of 1.5% per month (18% annual) thirty days past the due date. The charge will accrue on the original past due amount and not cumulative of other finance charges.
- Upon receipt of the signed Letter of Agreement, Bob Pike **will return an executed copy.**

The signatures below indicate acceptance of the letter of agreement and approval to begin work as specified.

Accepted Date \_\_\_\_\_ Date: \_\_\_\_\_

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Bob Pike

Tulsa ATD

Walt Hansmann, President  
P.O. Box 33351 Tulsa, OK 74153-3351



Proposal for:

**Walt Hansmann, CPLP®**  
**ATD Tulsa Chapter, Inc.**

December 21, 2018

Submitted by Dr. Jim Kirkpatrick

Thank you for giving us the opportunity to present you with this proposal. We have created a choice of plans based on our understanding of your needs. We are a flexible, fast-moving company. If you feel a different solution is in order, we would welcome the opportunity to discuss it with you.

The terms in this proposal are valid for events conducted by December 31, 2019.

## **Our Understanding of Your Training Needs**

Walt Hansmann of the ATD Tulsa chapter emailed Kirkpatrick Partners on December 20 with the following: “The ATD Tulsa chapter is in the planning stages for hosting the Oklahoma State Conference in the fall of 2019. Our target is 150-200 participants. I am gathering information and costs to present to our board.

Rather than the typical ATD state conference with a keynote and several simultaneous breakout sessions, we are exploring the idea of having two half-day workshops. Our feedback has indicated a desire for measuring and evaluating.

When you have time, please let me know your thoughts and how we might be able to work together.”

The details of the recommended program are as follows:

## **Business Case for Our Recommendation**

The Kirkpatrick Model provides a framework to training and is designed and delivered in such a way that there are results to measure and report in the end. It is a holistic, flexible approach that can be modified and applied to any training in any type of organization to ensure it increases performance and delivers results.

The Kirkpatrick Model has been the industry standard in training evaluation for over 50 years. Many competing models are admittedly built on the foundation of the Kirkpatrick levels. Why not work directly with the Kirkpatricks, the creators of the standard?

Research shows that training occurs over time. One event alone will not create the necessary sustained behaviors and produce the results that organizations seek. The Kirkpatrick Model and all of our programs are based on this simple yet powerful principle.

The Kirkpatricks measure the impact and value of training to an organization with return on expectations (ROE). ROE is built on the belief that learning and development supports and drives the needs and goals of the business. The training arm and the business agree on the key goals and metrics of an initiative at the start of a program and work together to accomplish them.

We do not believe in attempting to isolate the effects of training. Rather, we focus on helping training organizations to collaborate with the businesses they support to create mutual benefit.

## Recommended Program – Option 1 with Dr. Jim Kirkpatrick Facilitating

### Quoted in USD

#### Getting to Kirkpatrick® Levels 3 and 4: Creating Believable Value Presentation (1-3 hours)

Training is still "on trial," charged with incurring expenses in excess of the value it provides to the organization. Training must reinvent itself and transcend the classroom. Attend this information-packed session to learn how to structure initiatives so they enhance on-the-job performance and impact the bottom line. Learn directly from the creators of the Kirkpatrick Model the newest way to implement the four levels. This program will focus on tactics at Levels 3 and 4 and provide ideas that any professional can implement in their own organization.

This program is ideal as a keynote or as a complement to an event with other components.

[Click for program brochure](#)

For an in-house session, the investment options are as follows:

Dr. Jim Kirkpatrick facilitating:	\$7,998
ATD Chapter pricing:	\$3,999

For all in-person options, we ask that you pay actual facilitator travel expenses, including roundtrip economy class airfare, hotel accommodations, ground transportation, airport parking at origin, meals and incidentals (taxes, tips, tolls, internet access, visas, baggage fees, etc.). We also ask that you pay actual shipping costs for program materials.

## Recommended Program – Option 2 with a Kirkpatrick Certified Facilitator

### Quoted in USD

#### Getting to Kirkpatrick® Levels 3 and 4: Creating Believable Value Presentation (1-3 hours)

Training is still "on trial," charged with incurring expenses in excess of the value it provides to the organization. Training must reinvent itself and transcend the classroom. Attend this information-packed session to learn how to structure initiatives so they enhance on-the-job performance and impact the bottom line. Learn directly from the creators of the Kirkpatrick Model the newest way to implement the four levels. This program will focus on tactics at Levels 3 and 4 and provide ideas that any professional can implement in their own organization.

This program is ideal as a keynote or as a complement to an event with other components.

[Click for program brochure](#)

For an in-house session, the investment options are as follows:

Kirkpatrick Certified Facilitator facilitating:	\$4,998
ATD Chapter pricing:	\$2,499

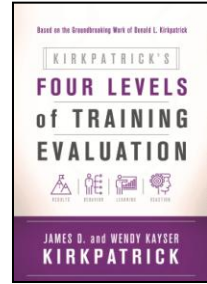
For all in-person options, we ask that you pay actual facilitator travel expenses, including roundtrip economy class airfare, hotel accommodations, ground transportation, airport parking at origin, meals and incidentals (taxes, tips, tolls, internet access, baggage fees, etc.). We also ask that you pay actual shipping costs for program materials.

**Value-added option:**

Add a copy of our newest book, *Kirkpatrick's Four Levels of Training Evaluation* for each participant.

- Up to 19 copies: \$19.95 USD each (20% off)
- 20-49 copies: \$17.95 (28% off)
- 50-99 copies: \$16.95 (32% off)
- 100+ copies: \$14.95 (40% off)

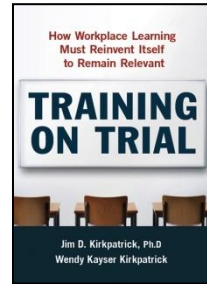
Actual shipping charges are added to all orders.



Add a copy of *Training on Trial* for each participant.

- Up to 19 copies: \$19.95 USD each (20% off)
- 20-49 copies: \$17.95 (28% off)
- 50-99 copies: \$16.95 (32% off)
- 100+ copies: \$14.95 (40% off)

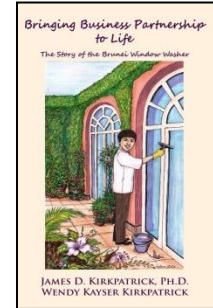
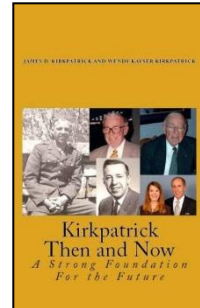
Actual shipping charges are added to all orders.



Add a copy of *Kirkpatrick Then and Now* or *Bringing Business Partnership to Life* for each participant.

- Up to 19 copies: \$17.95 USD each (10% off)
- 20-99 copies: \$14.96 (25% off)
- 100+ copies: \$9.98 (50% off)**

Actual shipping charges are added to all orders.





## Your Facilitators

**Dr. Jim Kirkpatrick** is co-owner of [Kirkpatrick Partners](#). He is a visionary and an expert in training evaluation and the creator of the [New World Kirkpatrick Model](#).

Using his 15 years of experience in the corporate world, including eight years as a training manager, Jim trains and consults for corporate, government, military and humanitarian organizations around the world. He is passionate about assisting learning professionals in redefining themselves as strategic business partners to become a viable force in the workplace.

Jim delivers lively keynote addresses and conducts workshops on topics including maximizing business results, creating powerful training and evaluation strategies, building and leveraging business partnerships and increasing the transfer of learning to on-the-job behaviors.

Jim co-authored three books with his father, Don Kirkpatrick, who is credited with creating the Kirkpatrick Model. He also has written four books with Wendy Kirkpatrick, including *Kirkpatrick's Four Levels of Training Evaluation and Training on Trial*. Jim and Wendy also served as the subject matter experts for the United States Office of Personnel Management's Training Evaluation Field Guide: *Demonstrating the Value of Training at Every Level*.



**Gerald Jones** is a Kirkpatrick Certified Facilitator with over five years of training development and facilitation experience.

Gerald is an associate with Booz Allen Hamilton and is primarily responsible for designing, developing and evaluating military training programs. He has over 16 years of military experience across two service branches (8 years U.S. Marine Corps Infantry and 8 years U.S. Air Force Geospatial Analysis), and he continues to manage training development and instruction teams in the California Air National Guard. Gerald has developed and delivered training for the U.S. Air Force Intelligence Community on subjects ranging from critical thinking to multi-cultural understanding and integration.

Gerald has successfully implemented the Kirkpatrick training evaluation methodology for three different Air Force units by forging partnerships between operations, training, and evaluation components to successfully infuse key drivers for mission accomplishment into the planning, design and execution of training programs.

Gerald earned his Bachelor of Science in Business Administration from



Nebraska Wesleyan University and is studying for the CPLP certification exam. He plans to leverage his dual backgrounds in Business Administration and Learning and Performance to further promote trainers' roles as strategic business partners within corporate, not-for-profit and government organizations. Gerald is Kirkpatrick certified at the bronze, silver and gold levels.

## The Kirkpatrick Difference

We recognize that there are many options available to you when it comes to training. Here are the key differentiators of Kirkpatrick Partners and our programs:

### A Strong Foundation

The Kirkpatrick Model has been the industry standard in training evaluation for over 50 years. Many competing models are admittedly built on the foundation of the Kirkpatrick levels. Why not work directly with the Kirkpatricks, the creators of the standard?

### Expert Involvement

Kirkpatrick Partners is owned and operated directly by Jim and Wendy Kirkpatrick.

We guarantee that a Kirkpatrick will customize your training materials, facilitate your program (unless you request an affiliate), and conduct the follow-up sessions. Instead of a team of hired facilitators, one of the Kirkpatricks will answer questions and guide application from their first-hand experience with worldwide best practices.

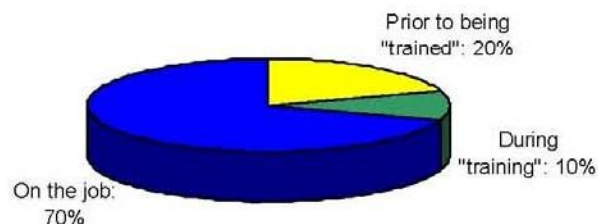
### Customization

The content for in-house certification programs will be customized to best meet your needs. We can incorporate and leverage what is already working in your organization so that you do not duplicate efforts and create unnecessary expenses.

During the program, we suggest that participants use their own initiatives as the basis for practice and application, so training time is actually work time.

### Training as a Process

#### Where Learning Takes Place



Josh Bersin and Associates, 2008

Research shows that training occurs over time. One event alone will not create the necessary sustained behaviors and produce the results that organizations seek. The Kirkpatrick Model and all of our programs are based on this simple yet powerful principle.

This is why our programs include pre-work and follow-up for no additional charge, as well as access to our resource library at any time. Program activities focus on real life examples and cases, and actual plan creation during certification is encouraged.

### **Head, Heart and Hands**

We are committed to providing personalized service to each of our customers.

Our goal is to facilitate skills that enable you to achieve great results on your own, without dependency on outside consulting resources.

The Kirkpatrick Model is elegant in its simplicity. Accordingly, we teach you to use it, and then we make ourselves available should you have questions or need assistance.

### **Partnership, not Isolation**

The Kirkpatricks believe that businesses are systems that must work together to succeed. Our model is therefore built on the principles of business partnership and training being an integral part of a larger system.

We do not believe in attempting to isolate the effects of training. Rather, we focus on helping training organizations to collaborate with the businesses they support to create mutual benefit.

### **ROE is the Ultimate Measure of Training Value**

The Kirkpatricks measure the impact and value of training to an organization with return on expectations (ROE). ROE is built on the belief that learning and development supports and drives the needs and goals of the business. The training arm and the business agree on the key goals and metrics of an initiative at the start of a program and work together to accomplish them.

The Kirkpatricks do not teach the formal ROI (return on investment) calculation. The basis of this measurement is isolation of the impact of one department versus all others, which directly conflicts with the business partnership we believe is required for organizational success.

The Kirkpatrick ROE calculation includes financial measurements, key metrics and the types of data that are important to the business. This is ensured because the business helps to define these elements up front. We find that fewer than 5% of organizations have any use for the actual ROI calculation.

## Clients

We are proud to have had the opportunity to work with these and other past and present clients.

The diversity of our clients demonstrates that the Kirkpatrick principles apply to all types of companies and industries.

Abu Dhabi Police Dept.	L'Oreal, Inc.
Baylor School of Medicine	Missouri Department of Transportation
Booz Allen Hamilton	Office of Personnel Management
California Transportation Department	Oxy of Oman Oil Co.
GE Healthcare	SABIC Oil Co.
Edward Jones	Sunoco Oil Co.
Emirates Aviation	PepsiCo
Enterprise Rent-A-Car	Phillip Morris
FDIC	PrintPack, Inc.
Harley Davidson	Research in Motion (RIM)
Honda Manufacturing	Toyota
Indiana University Health	U.S. Armed Forces (all branches)
IRS	U.S. Government agencies (numerous)

## Professional Affiliations and Awards

**The Kirkpatricks teach programs around the world for professionals in all industries.**



All of our courses are approved for CPT points to re-certify as a Certified Performance Technologist (CPT) through ISPI (International Society for Performance Improvement).

Kirkpatrick programs qualify for 1 point per hour of instruction.

**The only authentic Kirkpatrick programs are taught by Kirkpatrick Partners, and our affiliates around the world:**

<http://www.kirkpatrickpartners.com/AboutUs/KirkpatrickAffiliates/tabid/332/Default.aspx>

If the program is not taught by one of us, it is not a Kirkpatrick program.

**Don Kirkpatrick was the recipient of the following honors and awards:**

- 1975 President of ASTD
- 1982 Gordon M. Bliss award, ASTD
- 1983 Best book of the year, *How to Manage Change Effectively*, American Society for Personnel Association (ASPA), now called Society for Human Resources Management (SHRM)
- 1984 Best book of the year, *How to Improve Performance Through Appraisal and Coaching*, ASPA
- 1997 Hall of Fame, *Training* magazine
- 2003 Lifetime Achievement in Workplace Learning and Performance, ASTD
- 2006 *Legend in Training and Development*, ASTD
- 2007 Lifetime Achievement Award, Asia HRD Congress
- 2011 Thought Leadership Award, ISA (Associated Learning Professionals)

**Wendy Kirkpatrick is the recipient of the following honors and awards:**

- 2013 Emerging Training Leader Award, *Training* magazine

## Testimonials

Our years of experience allow us to offer you dozens of testimonials about our work. These are on our website, and available upon request.

Below are three testimonials that embody the power of a team that attends a Kirkpatrick program together:

*"Being the Director for a Department of Defense medical team training system, what an excellent opportunity to participate with our team of consultants at Kirkpatrick's Four Levels of Evaluation workshop. We have been using this multi-level evaluation framework in our program for more than 5 years; however, this hands-on session has already increased synergy and innovation as we continue to target actions in building and tracking that solid chain of evidence. This 2-day investment was invaluable and will propel our strategic efforts to show training impact and organizational change. From my perspective, this demonstrates an authentic business partnership."*

Heidi B. King, MS, FACHE  
Deputy Director  
U.S. Department of Defense Patient Safety Program

*"Since the Program we have changed our entire way of thinking about Results and begun to ask Senior Leadership to articulate their Expectations before we begin our training intervention. Now, we clearly know that without Level IV aims, plans and objectives, we cannot achieve Level IV results. We now believe this new approach will create a lasting business partnership with our senior leaders. Thanks for helping us see the light! We've even changed the name of our working group from the Measurement Team to the Evaluation Team."*

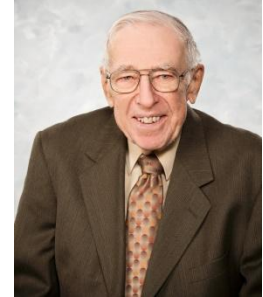
Steve Powell  
Principal  
Healthcare Team Training Inc.

*"I have an MSOD and consider my expertise as a change agent, not as a trainer. The ability to add this to my toolkit, and integrate it into my change management approach and my coaching practice will be a great differentiator to my personal and professional development. Coming to this session as a team saved us a year's work!"*

Carla Smith  
U.S. Department of Defense Patient Safety Program  
Booz Allen Hamilton

## The History of The Kirkpatrick Model

Dr. Donald L. Kirkpatrick designed what has become known today as the Kirkpatrick Model in 1954 as part of his [dissertation](#) at the University of Wisconsin. At the time, he was an instructor at the UW Management Institute and was seeking a way to create and measure impact in the training he conducted. His only intent in creating the model was to increase his own effectiveness.

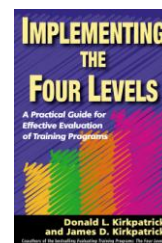
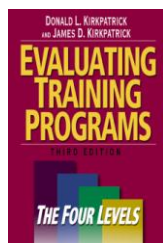


In 1959, ASTD (American Society for Training and Development) became aware of Don's work and asked him to write an article about it. He wrote a series of four articles, one on each of the four levels: Reaction, Learning, Behavior and Results. Don continued his work at the University of Wisconsin.

<b>Level 4: Results</b>	The degree to which targeted program outcomes occur and contribute to the organization's highest-level result
<b>Level 3: Behavior</b>	The degree to which participants apply what they learned during training when they are back on the job
<b>Level 2: Learning</b>	The degree to which participants acquire the intended knowledge, skills, attitude, confidence and commitment based on their participation in the training
<b>Level 1: Reaction</b>	The degree to which participants find the training favorable, engaging and relevant to their jobs

Over the course of the next three decades, the four levels became well known and widely used throughout the workplace learning and development field. Independent of any efforts to promote it, it grew to become the industry-accepted standard for training evaluation. A 2005 ASTD study revealed that Kirkpatrick Level 1 measures over 90% of training programs.

Based on the popularity of the model and scarcity of accurate information about it, Don was urged to write a book in the early 1990s. He went on to co-author three books with his son, Dr. Jim Kirkpatrick.



Don actively taught, wrote and consulted until the age of 85, showing his passion for his work and the betterment of workplace learning and development. Don passed away in 2014 at the age of 90. Dr. Jim



Kirkpatrick and Wendy Kayser Kirkpatrick, carry on Don's work by teaching and writing about the Kirkpatrick Model.

Jim and Wendy not only carry on the tradition of the Kirkpatrick Model, but they also modernize it and expand its usage. While the four levels were once thought of only as a model for evaluating the effectiveness of training programs, The Kirkpatrick Business Partnership Model is now used as a project management model to build value and impact into any program.



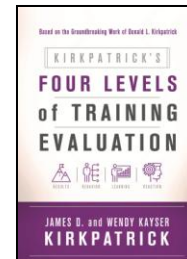
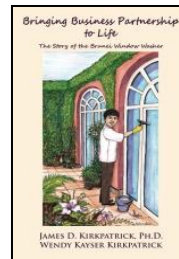
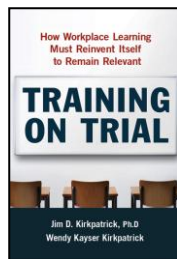
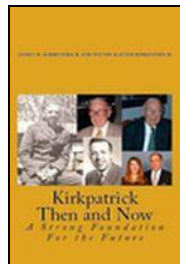
Jim and Wendy have also created The Kirkpatrick Goal Achievement Model, a method of identifying and accomplishing top professional and personal goals.

Jim and Wendy wrote [\*Kirkpatrick Then and Now: A Strong Foundation For the Future\*](#) (2009 Kirkpatrick Publishing). To unveil the Kirkpatrick Business Partnership Model and Kirkpatrick Foundational Principles, and demonstrate how the principles have always been woven into the work of Don Kirkpatrick since the beginning.

[\*Training On Trial\*](#) (2010 AMACOM Books) addresses the current crisis in the training industry and the urgent need for training professionals to become strategic business partners within their organizations.

Jim and Wendy's book [\*Bringing Business Partnership to Life: The Story of the Brunei Window Washer\*](#) (2012 Kirkpatrick Publishing) tells the endearing story of Chai, and explains how to engage all employees and accomplish the highest level business results in any organization.

In Jim and Wendy's newest book, [\*Kirkpatrick's Four Levels of Training Evaluation\*](#) (2016 ATD Press), discover a complete blueprint for implementing the model in a way that truly maximizes business results.



Jim and Wendy pride themselves on helping organizations to take a holistic approach to program development and the role of training therein. They provide the resources for learning and development professionals to take training to a new level of importance and professionalism within organizations. They are committed to helping companies succeed through leveraging their training resources in the most effective way possible to yield the desired business results.

Jim and Wendy are proud of the half-century legacy of the Kirkpatrick Model. They are also driving the evolution and growth of the model over the next 50 years to meet the ever-changing needs of the business.

## Sample Letter of Agreement

*This sample agreement represents typical terms for a customized in-house session, if you select that option.*

Created For: Walt Hansmann, CPLP® (client), ATD Tulsa Chapter, Inc. (Host)

Created By: Dr. Jim Kirkpatrick, (770) 683-2856, [jim.kirkpatrick@kirkpatrickpartners.com](mailto:jim.kirkpatrick@kirkpatrickpartners.com) (Facilitator)

Event Name: Training on Trial Workshop

Date: TBD

Location: TBD

Event timing: Presentations are 3 hours of presenter time.

Facilitator: TBD

Link to Dr. Jim Kirkpatrick's bio:

<https://www.kirkpatrickpartners.com/About-Us/Jim-Kirkpatrick>

Link to Gerald Jones' bio:

<https://kirkpatrickpartners.com/About-Us/Kirkpatrick-Certified-Facilitators/Gerald-Jones>

### Facilitator Responsibilities

- Participate in conference calls to discuss program objectives and any modifications
- Facilitate program per description provided
- Bring laptop computer and all course content (PowerPoint, audio clips, video clips, etc.)
- Email program pre-work and follow-up materials to all attendees
- Provide certificate of completion to all attendees
- Provide pdf of handout for host to duplicate and distribute
- Market program via kirkpatrickpartners.com and to Kirkpatrick Community

### Host Responsibilities

- Designate an event point of contact who will participate in two conference calls with the KP events manager to discuss program logistics: one after agreement is signed and one the week prior to the program. Point of contact will ensure that the room is set up properly, course materials are received, catering and technical support arrangements are made and the like.
- Participate in conference call to discuss program objectives and any modifications with facilitator
- Provide appropriate venue with seating in table groups of 4-6 people
- Market programs for worldwide pricing included in this proposal for the certificate and certification programs unless other pricing has been approved by Kirkpatrick Partners
- Provide web address containing program information and/or registration as soon as it becomes available to include on kirkpatrickpartners.com website
- Duplicate and deliver handouts to the class site

- Provide the following equipment:
  - LCD projector and screen
  - Speakers for laptop
  - One flip chart and markers for facilitator, and one for each table group
  - (For groups over 30) sound equipment:
    - Lavalier microphone for facilitator
    - Handheld microphone for audience comments

### Reimbursement – All amounts in USD

- Host provides facilitator fees for Dr. Jim Kirkpatrick as follows:
  - Getting to Kirkpatrick® Levels 3 and 4: \$7,998
  - ATD Chapter pricing: \$3,999
- Host provides facilitator fees for KCF (Kirkpatrick Certified Facilitator) as follows:
  - Getting to Kirkpatrick® Levels 3 and 4: \$4,998
  - ATD Chapter pricing: \$2,499
- Host directly pays or reimburses facilitator for actual travel expenses incurred (or any cancellation fees if event does not occur):
  - Roundtrip economy class airfare with no more than one connection and no layover longer than three hours. Itinerary must be approved by facilitator prior to booking.
  - Ground transportation or airport parking at origin
  - Ground transportation at destination
  - Hotel accommodations
  - Meals during duration of trip
  - Other incidentals, including taxes, tips, internet access, baggage fees, visas, etc.
  - Program material shipping charges
- A late fee of 5% will be added to all invoices that are more than 15 days past due. Late fees will be reassessed every 30 days until payment in full is received.
- Remit all payments to:
  - Wendy Kirkpatrick
  - Kirkpatrick Partners
  - 8 Madison St.
  - Suite C
  - Newnan, GA 30263

Credit cards are accepted for payments of \$5,000 USD or less. If you would like to make a larger payment via credit card, please add 3% to the total for payment processing fees. All other payments may be made by check or wire transfer. All wire transfer fees are the responsibility of the sender.

### Acknowledgement

By signing this letter, both parties agree to the conditions listed herein.

KP requests a signed agreement or executed contract from the host at least 8 weeks prior to the desired event date. Less lead time may be possible, but requires special advance approval from KP.

### **Exclusivity**

All program content remains the exclusive property of Kirkpatrick Partners, LLC.

Audio and video recording of the session is strictly prohibited.

Hosts and attendees understand and agree that they will NOT receive a copy of the PowerPoint presentation, and these remain the property of Kirkpatrick Partners.

Program handouts and key slides shared via email after the presentation are for the use of attendees and their direct work groups only; distribution, duplication, dissemination, sale or publication of these materials is strictly prohibited.

Program host acknowledges that they may not state or imply that they are an exclusive distributor of Kirkpatrick products and services or have any such ownership claim. Marketing of Kirkpatrick Partners products and services by the host shall be limited to the scope of the event for which this contract has been written.

Program host will not sell or market seats in a program quoted as a private in-house session without prior approval of Kirkpatrick Partners.

### **Marketing**

The presenter requests permission to:

- Sell Kirkpatrick books at the end of the seminar and conduct a book signing. Attendees are welcome to bring their own copies of Kirkpatrick books to be signed.
- Distribute information related to other Kirkpatrick Partners products and programs to course attendees.
- Contact and market to program participants who provide their contact information for such purposes.

Kirkpatrick Partners gathers basic contact information, including email addresses, for all individuals obtaining a certificate or being certified. This is used to send pre-work and follow-up materials. Participants will also be registered for the weekly e-newsletter. Contact information will never be shared or sold; participants may unsubscribe from all communications with one click at any time.

### **Photography**

Kirkpatrick Partners publishes photos on our Facebook fan page for all events that we host or attend. If you do not wish to have photos of your event posted, please remove this clause from the agreement prior to signing and returning it. By leaving this clause in the agreement you consent to photography at your event.

### **Cancellation Policy**

Both parties signing this agreement do not anticipate any reason why this program will be cancelled or rescheduled. They both agree that it shall only be cancelled if there is a major, unresolvable issue that precludes the program from being held.

Should the program be cancelled or rescheduled by the host for any reason 90 or more days prior to the event, the liability for the host is limited to the non-refundable reservation fee (if applicable), and reimbursement of any non-refundable expenses already incurred. If a plane ticket has been booked and is not fully refundable, the entire ticket amount will be invoiced to the host, unless an event is rescheduled for which the ticket balance can be applied. Any travel-related change fees are the responsibility of the host.

Should the program be cancelled 60-89 days before the event date, the host will be invoiced 50% of the program fee, plus any non-refundable travel expenses already booked/incurred.

Should the program be cancelled 59 days or fewer before the event date, the host will be invoiced for the entire program fee, plus any non-refundable travel expenses already booked/incurred.

Should the program be rescheduled by the host 89 days or fewer prior to the event, the host will be charged a 20% rescheduling fee (applied to the facilitator fee and any per person fees), plus any travel-related charges already incurred.

Should the rescheduled program subsequently be cancelled, the facilitator fee, the per person fee, and any other charges incurred will be billed in full, in addition to the 20% rescheduling fee, if it has not already been paid. Should the program be rescheduled a second time, an additional rescheduling fee of 20% will be added to the program fees. If after two reschedules the program is not held, Kirkpatrick Partners will consider the program cancelled, and the program will be invoiced to the host at 140% of the total program fees, plus all actual incurred costs. If a third reschedule is requested by the host, the program can be held if the host pays all fees within 2 weeks of selecting the new program date. If the third reschedule program is not held, all paid fees are forfeited.


If the facilitator must cancel due to illness, family emergency, airline failure or travel embargo, the facilitator is held free of liability other than paying non-refundable airline cancellation fees and making a good faith attempt to secure an appropriate facilitator replacement or reschedule the presentation, if desired by the host.

SAMPLE



**KEYNOTES:**

Paul Allen  
Dana Look-Arimoto  
Steve Allen  
Stacy Tiger  
Kayce Nelson

 Cyntergy  
810 S. Cincinnati Ave.  
Tulsa, OK 74119

 April 2, 2019, 4 p.m.

**SOAR**  
LIVE EVENTS

**TULSA, OK**  
**Help Make Oklahoma  
a Top Talent Destination**

**Tuesday, April 2, 4 - 6 pm, Cyntergy LLC, 810 S. Cincinnati Ave.**

Join Paul Allen, Founder, Ancestry.com and Soar.com, and Gallup Global Strengths Evangelist, along with Dana Look-Arimoto, global staffing expert, and experts from BOK Financial, CrossFirst Bank and CCK Strategies for a highly interactive community event to inspire action towards Governor Stitt's moonshot goal to make Oklahoma Top Ten through Making Oklahoma a Top Talent Destination. RSVP required at [events.soar.com Community=Tulsa](https://events.soar.com/Community=Tulsa)

*Event Price: \$50 – Each ticket will cover \$10 to purchase CliftonStrengths Top 5 to benefit a non-profit to be announced at the event.*

**<https://events.soar.com/events/details/soar-tulsa-ok-presents-help-make-oklahoma-a-top-talent-destination/#/>**

**Sponsors:**

