University of Texas San Antonio (UTSA)
Facilities Department
Customer Service Improvement Initiative

Submitted by:
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8/8/14

Proposal To:
UTSA Facilities Department
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Executive Summary

Founded by the Texas Legislature in 1969, UTSA has grown into a dynamic university with about 30,000 students from all over the United States and around the world. UTSA is on the path to Tier One status with a focus on research and academic excellence.

"This master plan serves as a common vision and a blueprint for progress, providing direction and a sense of place for our academic community. UTSA's future is in part a function of creative individuals who can imagine what the university will look like as it becomes one of the University of Texas System's flagship institutions. Dreams, aspirations and hard work will shape UTSA's future. It is my hope that this master plan will serve as a catalyst for the university's growth." - Ricardo Romo

Mission
The University of Texas at San Antonio is dedicated to the advancement of knowledge through research and discovery, teaching and learning, community engagement and public service. As an institution of access and excellence, UTSA embraces multicultural traditions and serves as a center for intellectual and creative resources as well as a catalyst for socioeconomic development - for Texas, the nation and the world.

Vision
To be a premier public research university, providing access to educational excellence and preparing citizen leaders for the global environment.

Facilities Department Mission
Promoting learning and discovery through teamwork and excellence in facility management.

Professional Development Objectives

To strengthen the customer service skills of its department, the Facilities Department at UTSA will have a focal point on training, needing a solution that provides time-tested and proven results in communication and customer service.

Reporting to the VP, Dave Riker met with Stephanie Lewis from Dale Carnegie on July 11th to review the possibility of working together.

The results of the APA review pointed to improvements being necessary in customer service. He has expressed interest in professional development training for supervisory team members including:

- Customer Service
- Communication Skills

As a result of the review, the Facilities Department seeks to build cohesion, open up the lines of communications between team members and departments, as well as foster collaboration in support of the organizational mission. The goal is to turn into a world class facility organization that listens to their regular clients and manages their customers' experiences.
Recommendation

In support of the Facilities Department's customer service development goals for supervisory staff members, Dale Carnegie Training® recommends the Dale Carnegie Course described on pages 4 – 6 of this proposal.

Facilitator biographies included on pages 9 – 10 provide UTSA with an overview of the qualifications of the Dale Carnegie Dedicated Delivery Team. Dale Carnegie Training's ISO-Certified trainer development and certification process ensures that UTSA employees receive a consistent approach to the delivery of the training. Dale Carnegie trainer will participate in pre-training briefing and discover calls to drive quality, consistency, and delivery excellence for UTSA.

Based on the philosophy that real growth and change take time, The Dale Carnegie Course utilizes adult learning principles along with rigorous coaching. These programs are not about abstract concepts or theory — they are about permanent, meaningful changes in behavior in alignment with the UTSA Facility Department's goals and objectives.

To hear what one Department of Defense client has to say about Dale Carnegie Training®, please go to the link below and click on the video titled: Develop, Engage, and Retain Talent.

http://www.dalecarnegie.com/LiveOnlineWorks
"People support a world they helped create." — Dale Carnegie

Companies today know that people provide the edge to increase customer satisfaction, expand market share, and build corporate value. How can organizations prepare employees to deliver peak performance? The newly transformed Dale Carnegie Course® can help. Through the use of team dynamics and intra-group activities, participants master the capabilities needed in today's business environment. They learn to strengthen interpersonal relations, manage stress, and handle fast-changing workplace conditions. They become persuasive communicators, creative problem-solvers, and confident, enthusiastic leaders.

Companies use the Dale Carnegie Course® to:

- Open lines of communication
- Increase the flow of bottom-up ideas by giving every employee the confidence to contribute
- Increase trust at every level
- Speed up change and make people more open to new ideas
- Replace conflict with teamwork
- Build trust and improve employee retention
- Encourage intelligent risk taking to increase performance
- Gain buy-in for a vision of the future and the strategies and tactics to get there
- Learn the 5 Drivers of Success
THE DALE CARNEGIE COURSE®

EFFECTIVE COMMUNICATIONS & HUMAN RELATIONS /SKILLS FOR SUCCESS

What you will cover

Build a Foundation for Success, Recall and Use Names

Build on Memory Skills & Enhance Relationships Increase Self Confidence

Put Stress in Perspective Enhance Relationships & Motivate Others

Clearly Present Ideas Energize Communication

Disagree Agreeably Gain Willing Cooperation and Influence Others

Manage Stress Develop More Flexibility

Build Others’ Strengths Through Recognition Inspire Others

Demonstrate Leadership Celebrate Achievements & Renew Your Vision

After this program, you will be able to:

• Connect with other business professionals and achieve breakthrough goals • Use a proven process to recall names and facts

• Use a proven process to strengthen relationships • Use experiences to communicate more confidently

• Handle stress before it handles you • Build trust and persuade people to take action • Communicate persuasively & move people to direction

• Communicate logically, clearly, and concisely • Energize and engage listeners

• Explore methods to minimize resistance and maximize team innovation • Create an “win-win” environment while increasing commitment

• Increase your ability to manage worry and stress • Use flexibility to build connections and create positive change

• Give positive feedback on the strengths in others build better results • Inspire others to take action

• Improve people’s attitudes and behaviors • Identify major successes and commit to continuous improvement

PROGRAM LENGTH:
ONE ½ Day SESSION EACH WEEK FOR 8 WEEKS
The Dale Carnegie Course®:
Effective Communications & Human Relations

"I highly recommend companies send groups through Dale Carnegie. As they take it together, they grow and develop together. It doesn’t matter what your company service or product is. The only real asset you have is your people. If you don’t invest in them, you’re lost before you’ve started."
- President, Truck & Tractor Company

"Lessons learned through Dale Carnegie help us keep a more harmonious and productive atmosphere between our employees and clients. As a result, the bottom-line is affected."
- Managing Partner, Lenders & Financial Company

"Dale Carnegie not only taught us how to deal with difficult people, but also how to cope with the related stress. As a result, we handle clients better and our job performance has significantly improved."
- President, Civil & Environmental Consulting Engineering Company

"As Operations Director, I felt the Dale Carnegie Course helped confirm my own thoughts that it is essential to take a step back from the day-to-day workings of the business and demanding more from departmental managers to allow myself to concentrate on moving the business forward. This also encouraged our team to stretch our goals and strive for greater achievements in planning."
- Operations Director, Car Manufacturing Company

"The impact of taking the class has benefited our company. Different personalities in the workplace can be tough; that was our main problem, accepting that different personalities offer complimentary strengths when approached the correct way."
- President, Ventilations Company

Develop Your Organization’s Competitive Edge - People
Instructional Strategies

To ensure maximum results, the training incorporates Dale Carnegie Training's proven ISO 9001 Certified Product Development and Delivery Process, allowing Dale Carnegie to offer a solution that achieves UTSA Facility Department's goal of providing their supervisors the opportunity to enhance their customer service skills in key focus areas. Dale Carnegie's® Product and Trainer Development management systems have been ISO 9001 certified since 1998 through the Bureau Veritas Quality International (BVQI), an internally recognized and well respected ISO registrar that provides objective third party review through semi-annual audits.

Utilize Proven Adult Learning Principles

Dale Carnegie Training’s Accelerated Learning Process used in professional and leadership development programs for federal customers provides a hands-on, behavioral approach with practice and simulation. Based on the philosophy that real growth and change take time, this process incorporates solid principles with rigorous coaching. These programs are not about abstract concepts or theory – they are about permanent, meaningful changes in behavior (i.e. how to open up the lines of communications as a leader or how to strengthen teamwork and results).

The Accelerated Learning Process builds on the participants’ experiences and ensures your agency has a process in place that accelerates the development of high-performing professionals and leaders.

In 1973, Malcolm Knowles published a book entitled, “The Adult Learner: A Neglected Species.” This landmark book, included four principle theories:

1. Adults want some control over the learning experience. They are self-directed and capable of making decisions.
2. Adults bring a wealth of knowledge and experience to the learning environment. They learn more effectively through guided discussion and problem solving than through lecture.
3. Adults learn best when they have a need to learn. They want practical advice and experience they can apply to solve problems outside of training.
4. Adults have different learning styles. Presenting ideas in a variety of different ways and interaction with others is important to adult learning.
Content

Dale Carnegie’s development and delivery systems allow the UTSA Facility Department’s leaders to gain the most efficient value from proven materials and skilled trainers who are developed to fit the content into the context of UTSA Facility Department-specific situations.

The trainers are highly skilled at helping UTSA personnel make the connection of concepts covered in the materials to real situations they face in the organization daily.
Trainer Biographies

Jose Rosario Garcia
Dale Carnegie Certified Trainer
Chihuahua, Mexico & San Antonio, TX

Mr. Garcia has been in the Performance Improvement field over 20 years, during which time he has served Dale Carnegie® as a Trainer, Salesperson, Director of Training, and Sales Manager. Before joining Dale Carnegie Training full time in 1996, he worked with Chrysler in a manufacturing plant, in a management position within the Automotive Industry.

Mr. Garcia is a certified Master Trainer for Core Competency, the Dale Carnegie® Course, and the Dale Carnegie® Sales Advantage for Dale Carnegie & Associates, Inc. He is certified in the Dale Carnegie Course for Effective Communications and Human Relations, Leadership Training for Managers, the Leadership Advantage, the Competency Based Development System, High Performance Teams, Professional Development Series, High Impact Presentations, and the Dale Carnegie® Sales Advantage.

Client Experience

Mr. Garcia has delivered Leadership and Management programs for Automotive Lighting, GE Healthcare, Johnson & Johnson, Tec Milenio University, Eaton Hydraulics Group, Magna International, Johnson Controls, Delphi Automotive, Continental Corporation, Robert Bosch, Transstelco, Cummins, Nexteer, Total Gas, Accellent, Cooper Lighting, 3M, Zodiac Aerospace, Sumitomo, Cemex, Federal Mogul, Epic Technologies, Lear Corporation, and Eagle Ottawa Leather Company.

Education and Credentials

> Engineering – ITCJ - Mexico
David Robertson
Dale Carnegie Certified Trainer
San Antonio, TX

Mr. Robertson began working in the Performance Improvement field in 1985. During that time he served as President/part owner of South Texas Internet Connections, President of the Texas Internet Service Providers Association, and Owner/Practice Manager of Bulverde Medical Clinic.


Mr. Robertson has been primarily focused in sales, marketing, and training for Dale Carnegie Training of San Antonio.

Client Experience

Mr. Robertson has worked with companies in the manufacturing, aeronautics, retail, and defense industries as well as numerous government agencies.

Education and Credentials

> B.A. in Management from Almeda University
TX-MAS Schedule Pricing Information

One Day Pre-Negotiated Cost: $7,254.58 for 1 group of up to 30 participants
TOTAL: $29,018.32 for one 8 week Dale Carnegie Course
(Eight 1/2 day sessions)

Logistics and Course Materials

• The program will be delivered for one day a week, ½ day sessions, for 8 weeks (Dates & Times TBD)
• Location: UTSA, TX
• The fee includes one pre-interview with a trainer, curriculum review and minor curriculum tailoring
• This includes one (1) instructor
• The class size will be a maximum of 30 participants (optimal participants=25)
• Training will be delivered according to the client's schedule
• Participant manuals and classroom materials will be brought to UTSA on the first day
• This proposal will remain valid for a period of 90 days after submission
Past Performance

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<th>AGENCY NAME</th>
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<th>VALUE</th>
<th>RELEVANCE</th>
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<tr>
<td>Defense Finance and</td>
<td>GSA MOBIS Blanket</td>
<td>$3,977,320</td>
<td>In support of the mission, DFAS has developed a Leadership Development</td>
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<td>Accounting Service</td>
<td>Purchase Agreement,</td>
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<td>Program and selected Dale Carnegie Training to conduct leadership training</td>
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<td></td>
<td>August 2010 – July, 2014</td>
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<td>for team leaders, first level supervisors and second level managers and</td>
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<td>supervisors. These leadership courses, which are aligned with the DoD</td>
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<td>Leadership Development Framework, Continuum, and Competencies, provide</td>
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<td>DFAS employees the tools they need to ensure today's workforce can truly</td>
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<td>become Tomorrow's Leaders.</td>
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TECHNICAL OFFICIAL CONTACT INFORMATION

Name: Tammy Jelenek-Jones
Phone: 317-212-7825
Email: tammy.jelenek-jones@dfas.mil

DESCRIPTION OF WORK

Group 1 courses focus on creating adaptive leaders enabling them to make informed strategic decision in support of the agency goals and objectives.

- Leading Self and Teams. Awareness/Basic (any non-supervisory or team leader).
- Leading the Organization. Advanced (second level manager or supervisor).

The Group 4 course Coaching and Feedback focuses on creating effective coaches to assist individuals change unproductive behaviors and produce breakthrough results.

- Coaching and Feedback. Intermediate/Advanced (First and second level managers or supervisors).

DFAS Contract Deliverable and Quality Standard

- Instructors must maintain a score of 4 (on a 1-5) scale, based on participant feedback on-line for each class.
- On-site instructor-led training as specified in the requirements section within the required timelines at designated locations as requested by DFAS.
- Dale Carnegie Training® furnishes National State Board of Accountancy CPEs for each participant within three weeks after class completion.
- Dale Carnegie Training® is required to provide training at primary DFAS sites as requested.
- Dale Carnegie Training must provide training services within 10 business days of notice for the training service for domestic requirements, and 30 days overseas.

RESULTS ACHIEVED

DFAS supervisors and managers have the opportunity to participate in leadership programs, which are aligned with the DoD Leadership Development Framework, Continuum, and Competencies, provide DFAS employees the tools they need to ensure today's workforce can truly become Tomorrow's Leaders.
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<tr>
<td>U.S. Patent and Trademark Office</td>
<td>GSA MOBIS Blanket GSA MOBIS #: GS-10F-0329-K PO#: MGET1300101</td>
<td>$44,000</td>
<td>In support of the strategic plan and to provide USPTO employees the opportunity to develop as professionals and leaders, USPTO offered Dale Carnegie Live Online Training as part of the USPTO Leadership Development Program. These 3-hour sessions were geared toward Supervisory Patent Examiners, who serve as second level and above supervisors. GS-15 supervisors, SLs, and SES members were also welcome</td>
</tr>
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**TECHNICAL OFFICIAL CONTACT INFORMATION**

Name: Al Halstead, Lead, USPTO Leadership Development Program
Phone: 571-272-2071
Email: Charles.halstead@uspto.gov

**DESCRIPTION OF WORK**

Dale Carnegie Live Online sessions offered to Supervisory Patent Examiners include:

- Creativity and Innovation
- Communicating Your Vision
- Influencing and Negotiating

Each Live Online Leadership Development session focused on specific competencies and outcomes identified as critical for those in a leadership position within the U.S. Patent and Trademark Office. For example, “Communicating your Vision” included an eight-step planning process that establishes the desired outcome or vision, clarified the current situation and sets specific goals and timetables to achieve required results. This module provided participants the steps necessary to turn an idea or innovation into a plan of action to clearly communicate to others. As a result of the session they were able to:

- Describe a vision in clear, specific, compelling terms
- Identify the steps necessary to transform the vision into action
- Implement a plan with clearly defined communication goals
- Manage themselves and others during organizational change

Additionally USPTO offered Mid-Level Leaders Dale Carnegie’s Conflict Management, geared toward first level supervisors, as well as sessions for all employees including:

- Writing Skills
- Time Management
- Problem Solving / Decision Making
- High Impact Presentations
- How to Present Online

**RESULTS ACHIEVED**

Patent Examiners in the areas of Mechanical and Electrical Engineering and Computer Science strengthened persuasive communication structures, processes and language utilization to improve their technical guidance and process improvements. This also strengthened their response to arguments, patent applications and technical program controls.
### Agency Name

U.S. Coast Guard Office of Standards Evaluation and Development

### Contract Information

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<tr>
<th>GSA #:</th>
<th>GS-10F-0329K</th>
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<td>Contract #:</td>
<td>HSCGGB8-12-F-MSR029</td>
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### Value

$50,783

### Program Relevance

Competency-based development training programs designed to provide USCG program managers, economists, and analysts strengthened communication and interpersonal skills resulting in a higher level of team effectiveness for the Office of Standards Evaluation and Development. The competency-based development training was configured using Team Member Engagement and Customer Service curriculum modules.

### Contact Information

Program Manager: Duane Boniface
Phone: 202-372-1460
Email: duane.e.boniface@uscg.mil

### Primary Locations

Washington, DC

### Description of High Performance Teamwork Training Project

The Office of Standards Evaluation and Development (CG-REG) which operates in a matrixed environment, doubled in size and was going through process and capability improvements. To provide employees tools to strengthen team member effectiveness, CG-REG selected Dale Carnegie Training® to facilitate High Performance Teamwork for its employees. This two-day, interactive program utilized the Dale Carnegie® configurable training process known as the Competency Based Development System.

Based on the philosophy that real growth and change take time, High Performance Teamwork for the U.S. Coast Guard Office of Standards Evaluation and Development incorporated adult learning principles along with rigorous coaching. This program was not about abstract concepts or theory – it was about permanent, meaningful changes in behavior in alignment with USCG Office of Standards Evaluation and Development goals and objectives.

Program content included:

1. Establishing an Effective Team
2. Being a Contributing Team Member
3. Communicate with Different Personality Styles
4. Listening Skills for Boosting Communication
5. Interpersonal Competence: Connect with and Influence Others
6. Disagree Agreeably
7. Team Problem Solving and Decision Making
8. Share the Glory
9. Sustaining Measurable Success
10. Collaborative Planning

By strengthening their ability to work even more effectively as a team the Office of Standards Evaluation and Development has tools to consistently support their mission, vision and values.

### Primary Performers of the Contract

Chris McCloskey, Program Manager, Chuck Macan, Operations Manager, Clark Merrill, Trainer