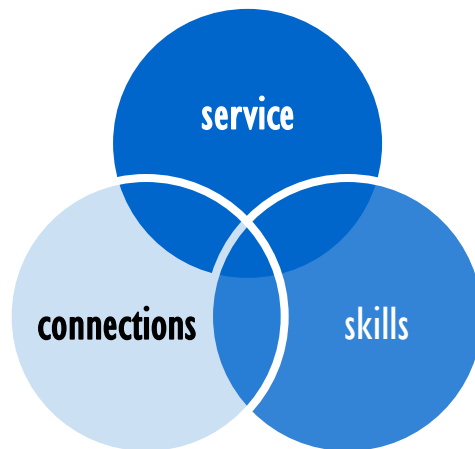


# Leadership Oklahoma City, Inc.

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Linking **O**KC's **Y**oung **A**dult **L**eaders

# CONTENTS

WHAT IS LOYAL?..... 3

ORGANIZATIONAL STRUCTURE ..... 4

SELECTING THE CLASS..... 5

THE CURRICULUM..... 7

LOYAL ACTION PROJECTS (LAPs) | THE COMMUNITY SERVICE COMPONENT 9

CONNECTIONS..... 11

EVALUATION..... 13

FREQUENTLY ASKED QUESTIONS..... 14

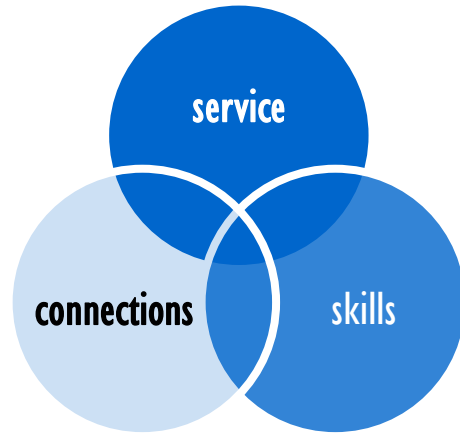
ABOUT LEADERSHIP OKLAHOMA CITY, INC..... 16

SAMPLE AGENDA FOR A CLASS SESSION..... 19

SAMPLE MODULE: PRESENTATION SKILLS SESSION ..... 22

SAMPLE REQUEST FOR PROPOSAL FOR LOYAL ACTION PROJECT ..... 27

A LOYAL CLASS V CLASS-GENERATED E-NEWSLETTER ..... 30



## WHAT IS LOYAL?

**LOYAL, LEADERSHIP OKLAHOMA CITY'S PROGRAM FOR YOUNG ADULTS AGE 21 -35, BRIDGES THE GAP BETWEEN LOKC'S HIGH SCHOOL PROGRAMS AND THE TRADITIONAL ADULT PROGRAM (SIGNATURE PROGRAM), WHICH TARGETS EXPERIENCED COMMUNITY LEADERS AND FOCUSES ON COMMUNITY INFORMATION.**

**LEADERSHIP OKLAHOMA CITY'S GOALS FOR LOYAL ARE TO DEVELOP COMMUNITY LEADERSHIP WITHIN THIS AGE GROUP AND TO RETAIN THESE YOUNG ADULTS IN CENTRAL OKLAHOMA.**

LOYAL is **A SKILLS-BASED PROGRAM**, introducing class members to skills such as meeting management, fund raising, and public speaking that are valuable in one's personal, professional, and community life.

LOYAL is a **HANDS-ON PROGRAM**. Class members practice the skills they are taught through experiential exercises and participation in short but substantial community service projects.

LOYAL emphasizes and facilitates the creation of **BROAD CONNECTIONS** among class members and the community.

LOYAL is **A SHORT-FORMAT PROGRAM**, meeting primarily after work for 3 hours one to two times a month for 7 to 8 months.

LOYAL is **OPEN TO APPLICANTS FROM DIVERSE PERSPECTIVES AND BACKGROUNDS**. It is not exclusively a young "professionals" group.

## ORGANIZATIONAL STRUCTURE

LOYAL is managed by volunteers with staff support.

### PROGRAM CO-CHAIRS

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Two volunteer Program Co-Chairs, a man and a woman, plan and oversee all the class sessions, recruit presenters, help with the community service project (LOYAL Action Project or “LAP”) teams, and serve as the general executives of the LOYAL program.

The Program Co-Chairs, selected by a nominating committee, serve one year in a shadow role and then as Program Co-Chairs for two years.

Program Co-Chairs serve on the Board and Executive Committee of Leadership Oklahoma City.

### PROJECT CHAIR

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Management of the LOYAL community service projects has evolved over the years. Originally, each project team had a coach from Leadership Oklahoma City and a liaison from the organization being served as well as some attention from the Project Co-Chairs. This proved to be more help than the class members needed.

Today, each project team has a liaison from the organization being served and a Leadership OKC contact. The Program Co-chairs and a single Project Chair divide the teams among themselves, usually overseeing two project teams.

### SELECTION CO-CHAIRS

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Two volunteers, a Signature Program graduate and a LOYAL graduate, serve as Co-Chairs for the LOYAL selection process, aided by a committee of Signature and LOYAL program graduates. As application numbers have risen to considerably over 100 for each class, the selection process has become a short but intense commitment.



### ADDITIONAL VOLUNTEER MANAGERS

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LOYAL has two outside-of-class components managed by volunteers. LOYAL LINK, a subcommittee of the Leadership Oklahoma City Alumni Association, plans and produces several events each year specifically targeting LOYAL class members and graduates. For example, a series of dinners hosted in the homes of Signature Program graduates introduce LOYAL members to Signature Program graduates.

The Network Action Group—NAGS—are Signature Program graduates who volunteer to serve as individual mentors to LOYAL class members. The NAGS were recently joined by Sidekicks, LOYAL graduates who are also serve as mentors.

## STAFF

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The Executive Director serves as the primary staff support for LOYAL, managing the database, room rentals and meals, production of materials, finances, and correspondence for the program.

The Deputy Director assists with program production, is the primary liaison for alumni activities and the mentoring component of LOYAL, and produces the annual pictorial directory of LOYAL members.



## SELECTING THE CLASS

### APPLICATION

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Any young adult at least 21 years of age who lives, works, or has a demonstrated interest in Oklahoma City may apply. Applicants must agree to attend the mandatory Opening Retreat and at a minimum all but two of the regular class sessions. The application form requires that two letters of recommendation be submitted along with a photograph and an application fee (currently \$10 up to two weeks prior to the deadline, and \$20 thereafter). A commitment form, which asks the applicant to agree to the attendance requirements and the tuition fee, plus permission from an employer if appropriate, also accompanies the application. Applications are generally available beginning in July and due the end of August.

### SIZE OF CLASS

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LOYAL began with 36 class members and moved up in the next classes to 42, 45, 60, and 60. The number of applications grew very quickly from 60 to 120, and since LOYAL is intended to be an entry level program, the class size grew as well. Running two concurrent or 6 month-long classes has been discussed, but at this time, a single large class is preferred.

Because the LOYAL class does not travel during their class sessions as the Signature Program class does, it is easier to have a larger class (no bus!) A class of 60 does limit the facilities used for class sessions—we try to hold each session in a different location to familiarize class members with more of Oklahoma City.

## SELECTION COMMITTEE AND PROCESS

The LOYAL Selection Committee is co-chaired by a LOYAL graduate and a Signature Program graduate, and includes at least 8 other committee members selected by the Co-Chairs. The Co-Chairs serve two years. About 10-14 days after the application deadline, the Committee receives notebooks with all the application materials except any request for a tuition waiver. (Waivers of up to half the total tuition due may be requested.) Committee members are asked to rank applicants from 1 to 3 based on potential for community service.

Applicants representing different backgrounds and perspectives are sought. Committee members return their scores to the office two days prior to the final Selection Meeting. The staff enters the rankings and generates a score for each applicant based on the number of “1” votes and the average total score. A card is created for each applicant (blue for men and pink for women—it’s a good visual) with the applicant’s name, company, job title, and other demographic information, such as a previous application and racial or ethnic information, plus the score.

### John Doe

Doe Law Firm  
Associate Attorney

AI (Cherokee)      SE/SW      Y—LYL III

## 36

At the Selection Meeting, a large matrix is taped to the meeting wall. The Committee starts by putting all the applicants with a certain score or higher on the matrix, and then begins to complete the matrix using additional variables that emerge—more of one gender, fewer from the banking sector, additional previous applicants, and the like.

For Profit Categories	1	2	3	4	5	6 and on to the number of available spaces in the class, currently 60	60	Nonprofit Categories
Finance			John Doe Bank of OK 31					Youth
Law	John Doe Doe Law Firm 36							Arts
Real Estate		Jane Doe Doe Real Estate Inc 28						Human Service
Retail							Jane Doe ABC Foundation 34	Foundation
Energy								Government
Health								Education
Other								Volunteer

All applicants receive a letter within a week of selection, usually to their home address to avoid scenes at the office since they may be one of a number to apply from that organization, that invite to be part of the class or inform them that they were not selected.

## DIVERSITY

Bringing together young adults from diverse backgrounds and perspectives is a tactic used to advance Leadership Oklahoma City's mission of developing leaders for the community. A number of demographic measures are used by the Selection Committee, including occupation, gender, geographic sectors, interests, and age. Racial and ethnic diversity is the easiest to showcase:

### Racial and Ethnic Demographics of LOYAL Class Membership

LOYAL Class	White	Black	Hispanic	Other	Native American	Asian	# of Graduates	% Minority
L1	25	2	2	0	3	3	35	28.6%
L2	30	4	5	0	2	1	42	28.6%
L3	34	3	1	1	2	2	43	20.9%
L4	40	4	8	0	4	2	58	31.0%
L5	41	6	5	1	5	1	59	30.5%

Oklahoma County is about 75% white.

## THE CURRICULUM

Each regular class session addresses one skill that enhances one's capacity for community involvement.

### THE TOPICS

Some of the topics include:

- Networking
- Risk Taking
- Fund Raising
- Special Event Management
- Press Relations
- Introducing a Speaker and Moderating a Panel
- Business Etiquette
- Board Skills
- Ethics
- Meeting Management Processes: Parliamentary Procedure and Facilitation
- Advocacy



## THE FORMAT

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A typical class includes one hour of training and one hour of hands-on experience in the topic. For example, an Ethics class might include speakers who introduce the topic of ethics, tell personal stories of ethical situations, and give guidelines for making ethical decisions. In the second hour, the class breaks into small groups and resolves real-life ethical scenarios from a health care perspective, and then discusses as a whole group the issues that arose and how they made decisions.

## THE MODULES

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For many of the classes, additional written material, called modules, are given to class members. The modules include more comprehensive information about the material covered in class and occasionally related information not covered in class.

For example, the Presentation Skills session has a module taken directly from the presenters' material on "Moderating a Panel" [see example [Sample Module: Presentation Skills Session](#)] and an additional module on common grammatical mistakes.

## OTHER CURRICULUM COMPONENTS

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### OPENING RETREAT

**PRIMARY GOAL:** Our imperative for the Opening retreat is for all group members to have significant familiarity with every other group member.

**LESSER GOALS:** **Overview of the program:** One of the goals for the Opening Retreat is to give the group members an overview of the program: a look at the remainder of the program, what the topics will be, what processes will be used, and what the expectations for participation are.

**Introduce LOYAL Action Projects (LAPS):** All LOYAL class members participate in a community service project within the LOYAL program. Selected from proposals submitted by community organizations by a committee prior to the commencement of the LOYAL class, the LOYAL Action Projects usually require 6 to 12 LOYAL class members to work as a team for several months to complete. Representatives from the selected projects present their organizations and projects to the LOYAL class at the Opening Retreat, and class members rank their preferences for assignment to a project.

### FORMAT

The LOYAL Opening Retreat is typically one weekend day in late October, usually Sunday, from 8 a.m. to 6 p.m. A site that has a meeting room large enough for the whole group and some breakout spaces, plus a good outdoor space for some of the exercises is preferred. We've used the local newspaper's headquarters building and its grounds, a Camp Fire Girls and Boys day camp, and a local museum.

### ACTIVITIES

A mix of exercises designed to teach the class members each others' names start the Opening Retreat. Additional exercises that break the class into shifting smaller groups and have them work together to solve a problem or share personal information advance the getting-acquainted goal. A personality profile and related exercises, such as True Colors, is usually a significant component of the Opening Retreat as well.

## GRADUATION

At the LOYAL graduation, each class member receives a LOYAL award. A brief report on the LOYAL Action Projects is made. Guests may include class members' spouses, significant others, friends, and employers. Previous LOYAL graduates are often included, as well as the LOKC board of Directors. The meal is free for LOYAL class members and one guest; other guests pay a break-even cost for the meal, usually \$15-25.



LOYAL graduation has metamorphosed over the years. The first year, we combined the LOYAL and Signature Program Graduations at the Annual Awards Luncheon, but it took too long and as the LOYAL class grew in size from 36 to 60, LOYAL graduation became too large to fold into an existing event.

For the next several years, Graduation was held at the end of the Closing Retreat. Dinner was served and guests invited to join the class for graduation.

In 2010, a graduation luncheon, similar to the Signature Program Graduation but entirely separate, will be held. It remains to be seen if a middle-of-the-day event is accessible to the LOYAL audience.

## LOYAL ACTION PROJECTS (LAPS) | THE COMMUNITY SERVICE COMPONENT

### WHAT IS A LOYAL ACTION PROJECT (LAP)?

LAPs are community service projects implemented by LOYAL class members as part of their training. The mission of LOYAL Action Projects (LAPs) is to

*Provide participants with a valuable learning experience in community leadership and engagement through team projects that address a current civic issue.*

Conducted in partnership with a local nonprofit or school, LAPs are an integral component of the LOYAL curriculum. Class members address civic and community issues that are in need of focused attention and leadership and concurrently learn about the steps necessary to resolve issues and implement projects.



### THE PROCESS

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Requests for Proposals for LAPs are sent out to the community in the summer preceding a LOYAL class. Community organizations complete a simple form [see Sample Request for Proposal [Sample Request for Proposal for LOYAL Action Project](#)] outlining their short-term project. A committee of Leadership Oklahoma City volunteers selects finalists from the RFPs and invites a number to present to the committee in person. Adjustments to the proposed projects are often made at this time—the scope is narrowed or broadened, for example, to fit the LOYAL team’s capacities better. The committee then selects the projects that will be the LOYAL Action Projects for the class.

The number of projects selected has varied with experience and class size. Teams of no more than 10 work best, and some projects require even fewer team members. In 2009-2010, there were 59 class members and 6 projects.

Class members hear presentations on the projects at Opening Retreat and rank their preferences for a project. To date, everyone has been assigned to his or her first or second choice.

## WHAT ARE THE BENEFITS OF LAPS TO THE PARTNER ORGANIZATIONS?

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LAPs provide Partner Organizations

- A portal for increased community awareness of their work
- Implementation of a short-term project
- A team of committed, energetic volunteers to address a short-term need of the organization who may become long-term advocates for the organization

## WHAT ARE THE CRITERIA FOR A LAP?

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Leadership Oklahoma City is designed to develop leaders for the community. LAPs are a **strategy** used to teach class members about creating and implementing community service projects and to provide practice in those areas.

- Projects must benefit the Greater Oklahoma City region, and may not be partisan or sectarian in nature. Faith-based or political entities may apply for a project as long as the project is not limited to serving or promoting a particular faith or political perspective.
- LAPs are not just “bodies”—they are not activities simply requiring a given number of volunteers to show up and perform service. For example, staffing a booth at the Festival of the Arts would not qualify as a LAP; however, creating a new tool for volunteer recruitment and then using that tool to staff a booth would qualify. There should be a planning component required of the LOYAL participants.
- LAPs may include a small fund raising component, but it should be limited and very specific. For example, if you want help with a special event, LAP fund raising should be limited to a small silent auction or the underwriting for the printing or one new corporate sponsor, not all of those. Keep in mind that these young adults do not typically have access to major corporate donations nor are they themselves able to give large sums.



- The sponsoring organization should have the capacity to implement the LOYAL project appropriately. For example, if a small special event is to be created by the LOYAL team, the organization must have the capacity—the staff, volunteer, and funding base—to continue the event on its own.
- Class members must be able to do most of the work on the project outside regular working hours, since they are limited in time they can take away from their employment. 24 hours over 6 months per volunteer is a maximum amount of time sought.

## WHAT DO LAPS LOOK LIKE?

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Previous LOYAL classes have:

- Revamped the web site for Great Walks OKC and doubled the number of walks
- Written a curriculum for 10 sessions for middle schoolers from John Marshall High School on life skills to be used in an after-school program by Crossings Community Church
- Created a process for recruiting and tracking volunteers for the Redbud Classic race
- Created and trained staff in the use of a tracking database for Celebrations Preschool
- Worked with the Oklahoma Heritage Association to increase the number of applications for available scholarships
- Developed a marketing plan for the Fitness Buddies program of Schools for Healthy Lifestyles
- Created a volunteer recruitment, management, and retention plan for the Boys & Girls Clubs of Oklahoma County
- Analyzed the Oklahoma Visual Artists Coalition’s Momentum event and presented recommendations to increase arts sales and other facets of the event.
- Helped create and produce a new special event, the Doggy Derby, for the Oklahoma Humane Society, and the Scrabble Showdown, for the OKC Metro Literacy Coalition, and for the Parkinson’s Foundation
- Assisted the Christmas Connection by researching local nonprofits engaged in service provision similar to the Christmas Connection and making recommendations for changes that would focus the agency’s work
- Rebranded Traveler’s Aid Society of Oklahoma to encompass and promote their assistance to homeless and others in financial need
- Created and implemented a volunteer recruitment event for Juvenile Diabetes Research Foundation
- Formed a Teen Board for Big Brothers Big Sisters and for Oklahoma City Beautiful
- Created a College Board for Infant Crisis Services
- Marketed HeartLine’s 211 first big awareness and fund raising campaign
- Produced programming for Paseo Arts Association

## CONNECTIONS



Building connections--among class members, between class members and other program graduates, and between class members and civic leader--is a key strategy for LOYAL. Enhancing the web of connections for participants addresses both of LOKC’s goals for LOYAL: engaging LOYAL class members more effectively in the community and encouraging them to remain in central Oklahoma.

Originally, the intent was to keep the class size relatively small, easily enabling class members to get

to know all the other class members reasonably well. However, the surge in demand for class membership has resulted in larger classes and alternative strategies for creating connections.

As the class size has increased, the number of outside events for LOYAL class members has increased to facilitate their getting to know all the other class members. LOYAL LINK

A subcommittee of the LOKC Alum Association, LOYAL Link focuses on events and tactics for connecting LOYAL class members and alums with new people and organizations. LOYAL graduates may (and do) join the LOKC Alum Association as full members for a reduced annual dues cost of \$50 instead of the usual \$75. They are then invited to all the events the Alum Association offers, usually 8-10 annually. However, LOYAL graduates asked for activities targeting a younger age group, and LOYAL Link was created.

## **NAGs**

One of the activities implemented by LOYAL Link is the Network Action Group (NAG). Each LOYAL class member is assigned a NAG—a mentor—who is encouraged to include the LOYAL class member in his or her other activities as well as accompany them to LOKC alum events. NAGs often invite their LOYAL assignees to visit their Rotary or Kiwanis Clubs, go to lunch, meet for drinks, and the like.

## **Sidekicks**

Sidekicks, added to the NAG program in its second year, are LOYAL program graduates who are also assigned to a LOYAL class member, giving the class member more of a peer relationship than they have with their NAG.



## **Events**

The LOYAL Link Subcommittee plans two or three LOYAL-specific events a year. One popular event is a set of dinner parties in the homes of Signature Program graduates. 6 to 8 Signature Program graduates volunteer to host 6-10 LOYAL class members in their homes on a certain evening. Attendees pay a small fee (\$15-\$20) to cover the costs and the LOKC staff orders casseroles, salads, and to be picked by subcommittee members and delivered to the hosts' home. At the end of the evening, everyone congregates at one home for dessert.

Another well-attended event has been a mixer just with LOYAL graduates early in the LOYAL class year at a local club. Inter-LOYAL class competitions have been another offering—an evening at a bowling alley and a games night at a local club.

## **Affinity Groups**

We also encourage the class to form their own affinity groups, a task they have assumed with gusto. There may be a “Parents of Toddlers,” “The Not Snobby Wine Tasters,” the “Thursday Night TV Watchers,” various sports league teams such as kickball and softball, and dinner, lunch and breakfast clubs going on at any time. They identify and manage their own affinity groups.

## **Class Bios**

Class bios were added for Class V. At the beginning of each class session, 4-6 class members stand and deliver—their own short bio. A handout with that session’s bios, updated contact information, and photos of the reporting class members is part of the packet for each session, and at the end of the program, a revised directory with bios and contact information is distributed via a PDF file.



**Jose Ocque**  
Company, Job Title  
Address  
Phone Home Phone Mobile Phone  
Email Home Email Spouse  
Home Address

Jose Ocque serves as one of the Construction Builders for the Edmond area of Home Creations. His primary responsibility is to oversee the construction process from start to finish for a span of 15 to 20 homes. This includes the management and leadership of subcontractors, in order to deliver a quality in a timely manner, as well as the development of a relationship with the customers to inform them the technical aspects and deliver a product to their satisfaction. Jose was born and raised in Caracas, Venezuela. At 17, he moved to Oklahoma to study English as a second language. After two months, he was accepted into the University of Oklahoma, where he graduated with a degree in Construction Science in 2005. During college, he served as the president of the Panamerican Student Association, among others leaderships activities. When Jose is not working, he enjoys traveling around the world, playing tennis, working out and hanging out with friends.

### Other Connection-Building Tactics

In addition, class members always designate a bar or restaurant near every session location for after-hours revelry. They create Facebook pages, weekly e-newsletters [see example [A LOYAL Class V Class-Generated E-Newsletter](#)], and heaven only knows what else for themselves. There are, inevitably, romances among class members—we stay out of that, but so far we have one marriage that we know of as a result of LOYAL (and too many heartbreaks and too much drama to share!)

In short, the more connections we can build for class members, the more likely we believe they will be to stay in central Oklahoma, and the more effective they will be as community volunteers.

## EVALUATION

LOYAL class members are asked to complete evaluations of each class session, of their LOYAL Action Projects, and of the program as a whole. A mix of online instruments via Survey Monkey and small group focus groups are used for these evaluations.

Community organizations that have a LOYAL Action Project are also asked to evaluate the LAP process and success.

As a new program, completing its 5<sup>th</sup> year in Spring 2010, LOYAL is evolving. The evaluations are invaluable in helping LOKC craft a program that meets the needs of young adults while preparing them for more than they know. Class topics such as etiquette have been added, and others, such as “How to Present with PowerPoint” dropped as class members have reported that they know more than the presenters.

## FREQUENTLY ASKED QUESTIONS

### Is there a negative impact on the traditional adult program?

Leadership Oklahoma City has been careful to keep the curriculum for the two programs different. The intent is for LOYAL to be an entry level program and the Signature Program to target more experienced community leaders. Other than a few icebreakers and activities that are used in the Opening Retreats, the programs are entirely different. Two LOYAL graduates to date have been admitted to the Signature Program after completing LOYAL; more have applied but not selected.


Application numbers for the Signature Program over the 5 years of LOYAL have ranged from 74 up to 111 in 2010. Application numbers for LOYAL have steadily increased, from about 60 to 120. There appears to be more than enough demand for the two programs; in fact, application numbers for both programs are in our “red zone”—we’re turning down far more people than we’d prefer.

### What are the differences between Leadership Oklahoma City’s two adult programs?

	LOYAL	Signature Program
General description	LOYAL is a short-format skills-based program intended for young adults just beginning their community service careers.	The Signature Program is a community-information program designed for experienced community volunteers to broaden their knowledge of community issues.
Time Required	Regular sessions are 4:30 – 8 p.m., once or twice a month, November through April. Mandatory Opening Retreat is 4th or 5th Sunday in October, 8 a.m. – 6 p.m. Additional time is required outside of class for LOYAL Action Projects, the community service component.	Regular sessions are 8 a.m. – 5:30 p.m., 2nd Thursday of each month, October through May. Mandatory Opening Retreat begins 2nd Thursday in September and concludes the next day at 5 p.m.
Curriculum	A skills-based program, focusing on skills needed to be an effective community leader	A community information program, focusing on issues that affect central Oklahoma
Current Program Topics	Networking, risk-taking, business etiquette, fund raising, special event management, presentation skills, ethics, meeting management, and board skills.	Public safety, health, human services, government and media, education, quality of life, and economic development
Age range	Must be at least 21 and not more than 10 years out of your last full-time educational experience. The median age in this year’s LOYAL class is 27.	Must be at least 21. The median age in this year’s Signature class is 42.
Class size	59 in this year’s class	48 in this year’s class
Tuition (current)	\$400	\$2000
Class Project	Mandatory	Optional
Time Required	Most classes are from 4:30 p.m. to 8 p.m. once or twice a month, October through April or May. Two or three all-day classes on a weekend day.	Classes are from 8 a.m. to 5:30 p.m. on the 2nd Thursday, October through May and a 2-day mandatory Opening Retreat in September (Sept. 6-7 in 2007)
Absentee Policy	Opening Retreat is mandatory. No more than two other classes may be missed.	Opening Retreat is mandatory. No more than two other classes may be missed.
Application period	Applications for the next LOYAL class will be available in Summer 2007.	Applications for the Signature Program are available January through March.

## How is LOKC able to keep LOYAL tuition so low?

Leadership Oklahoma City has a tuition continuum of sorts.



Tuition	Program	Targeted Population	Percentage of Cost Covered by Tuition	What Covers the Rest of the Cost
\$2,000	Signature Program	Senior, experienced community leaders	100% All direct and indirect costs	
\$400	LOYAL	Young adults, 21-35, just beginning their civic lives	50% All direct costs, such as meals and materials	Annual Campaign, endowment income, and occasionally grants and sponsorships
Free	High School Programs	Sophomores, juniors, and seniors from public and private schools, no more than 3 per program from the same school	0% No tuition is charged.	Annual Campaign, endowment income, and more frequently, grants and sponsorships

## Other Questions?

Please contact Beth Shortt at 405-463-3331 or [info@lokc.org](mailto:info@lokc.org).

This packet will be posted at [www.lokc.org](http://www.lokc.org) on the Community Resources tab.



**MISSION: LEADERSHIP OKLAHOMA CITY DEVELOPS LEADERS FOR CIVIC SERVICE.**

Leadership Oklahoma City (LOKC) is a 501(c)(3) nonprofit organization, founded in 1981, dedicated to increasing the pool of volunteers who have the capacity to be effective forces of positive change in the community.

**THE STRATEGIES** by which Leadership Oklahoma City advances this mission are:

**Educating** about the community's needs, resources, and opportunities;

**Training** in skills necessary for effective community leadership; and

**Connecting** people from diverse backgrounds and perspectives with a common interest in community improvement.

**THE PROGRAMMING:** These three strategies are used in Leadership Oklahoma City's programming, which target two population groups:

ADULT PROGRAMMING currently includes:

**The Signature Program**, now in its 28th year, a community information program;

**The LOYAL (Linking OKC's Young Adult Leaders) Program**, a skills-based program; and the

**Alumni Association**, which provides continuing education and connections to adult program graduates.

YOUTH LEADERSHIP EXCHANGE (YLY) PROGRAMMING currently includes:

**Leadership Skills program**, for high school sophomores and juniors, a community information program;

**Youth in Action program**, for high school sophomores, juniors, and seniors, a skills-based program; and the

**Youth Council of Oklahoma City**, for high school juniors and seniors, a project of the City of Oklahoma City managed by YLY, which educates and involves teenagers in city government.

**GOVERNANCE**

A 38-member Board of Directors governs Leadership Oklahoma City. A 12-member Executive Committee meets between regular meetings of the Board. In addition, the Youth Leadership Exchange program, the umbrella for

high school age programming, is governed by the 40-member YLX Board of Directors, which includes graduates of YLX programs. The YLX Board is a separate class of Directors for LOKC. Finally, the Alumni Association elects its own Executive Committee members and class representatives, who operate as the governing board for adult alumni activities.

## STAFF

Executive Director: oversees adult classes, fund raising, and is the liaison to the LOKC Board of Directors

Deputy Director: oversees accounting, publications, and the Alumni Association and is the liaison to the Alumni Board

Youth Director: oversees youth classes and is the liaison to the YLX Board of Directors

Program Assistant: part-time staff assists with administrative work and youth programming

## REVENUE

Amount	Source
\$100,000	Tuition
\$75,000	Annual Campaign
\$65,000	Alumni Dues
\$50,000	Endowment income
\$25,000	Management fee from City of Oklahoma City for Youth Council of Oklahoma City
\$20,000	Event income from alumni activities such as informational lunches and social events
\$10,000	Assorted grants and sponsorships
\$5,000	Application fees and sale of membership list
<b>\$350,000.00</b>	<b>Total Budget</b>

LOYAL ANNUAL BUDGET

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<b>Revenue</b>	
Tuition	<b>\$23,000</b>
Application Fees	<b>\$2,000</b>
Allocation from Annual Campaign and Endowment Income	<b>\$20,000</b>
<b>Total LOYAL Revenue</b>	<b>\$45,000</b>

<b>Direct Expenses</b>	
Room Rentals	<b>2,500</b>
Breakfast	<b>\$100</b>
Lunch	<b>\$500</b>
Dinner	<b>\$5,750</b>
Snacks	<b>\$150</b>
Materials	<b>\$1,000</b>
Graduation	<b>\$5,000</b>
<b>Total Direct Expenses</b>	<b>\$15,000.00</b>
<b>Overhead</b>	
Salaries and Benefits	<b>\$16,000</b>
Occupancy, Phone, Insurance, Etc.	<b>\$14,000</b>
<b>Total Overhead</b>	<b>\$30,000</b>
<b>Total LOYAL Expenses</b>	<b>\$45,000</b>

# NETWORKING

**Thursday, November 5, 2009**

**4:30 p.m. – 8:00 p.m.**

**Science Museum Oklahoma**

**2100 NE 52<sup>nd</sup> St.**

**Goldman Room (on second floor)**

**Dress: Whatever you wore to work**

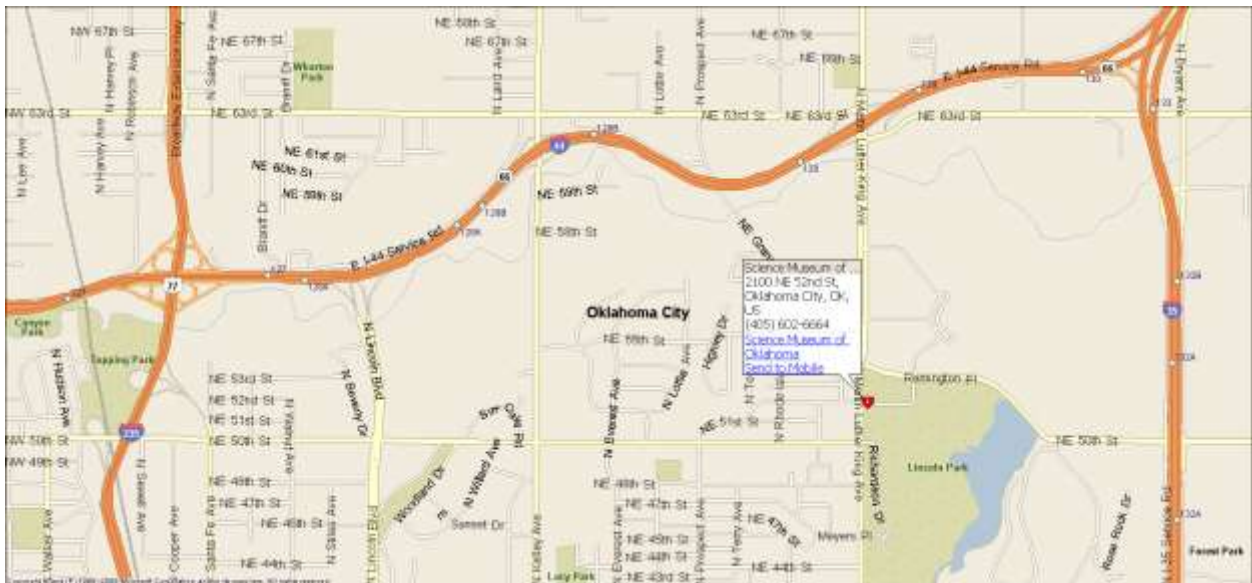
## Science Museum Oklahoma

2100 NE 52<sup>nd</sup> St.

Science Museum Oklahoma (formerly Omniplex) is on the east side of Martin Luther King Ave, just south of Remington Park and west of the OKC Zoo. From I-35, exit onto 50<sup>th</sup> street and proceed west. From I-44, exit onto ML King and go south. The bright red dome of the SMO Dome Theater is a good landmark.

The entrance to SMO is on the north side of the building, fronting the large parking lot. Use the Main Entrance, which is the easternmost entrance, closest to the Zoo.

[http://maps.google.com/maps?f=q&source=s\\_q&hl=en&geocode=&q=science+museum+oklahoma&ll=37.0625,-95.677068&sspn=48.019527,114.169922&ie=UTF8&hq=science+museum&hnear=Oklahoma&ll=35.525835,-97.478514&spn=0.012137,0.027874&t=h&z=16](http://maps.google.com/maps?f=q&source=s_q&hl=en&geocode=&q=science+museum+oklahoma&ll=37.0625,-95.677068&sspn=48.019527,114.169922&ie=UTF8&hq=science+museum&hnear=Oklahoma&ll=35.525835,-97.478514&spn=0.012137,0.027874&t=h&z=16)



- 4:30 p.m. | **Business Meeting**  
**Marion Paden and Mike Biddinger, Program Co-Chairs**
- Bios**  
**Shelley Branum**  
**Roman Chavez**  
**Marilyn Davidson**  
**Leanne Dias da Silva**  
**David Dirkschneider**  
**Kristi Foreman**  
**Justin Hull**  
**Sarah Soles**
- 4:50 p.m. | **Welcome to Science Museum Oklahoma**  
**Don Otto**  
*President, Science Museum Oklahoma*
- 5:00 p.m. | **Networking**  
**Mike Joseph**  
Attorney, McAfee & Taft
- 5:45 p.m. | **Dinner**  
**Steve Raybourn**  
*Meet in LAP Teams*
- 6:15 p.m. | **Marketing You**  
**Jim Farris**  
President, James Farris & Associates
- 7:00 p.m. | **NAGS and Sidekicks**  
**Reception with NAGs and Sidekicks**  
**Dianna Berry, Kelly DuPuy, and Jim Farris**
- 8:00 p.m. | **Adjourn**

## Presentation Skills

### Moderating a Panel

Why do panels need moderators? Couldn't the panel members simply set time limits and ground rules and police themselves?

#### The Role of a Moderator

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A moderator is an impartial observer of a panel. Slightly distanced from the content of the panel, the moderator is better able to control the process of getting the content out than the panelists themselves. A moderator is like a traffic cop. He or she makes sure that everyone gets where they want to go in accordance with the rules. The moderator enforces the rules—the process—with the goal of having everyone present have the best experience possible.

#### Successful moderators

- Understand the goals for the panel.
- Set the structure.
- Inform the panelists
- Set the tone
- Keep it lively
- Control the event
- Intervene when things go wrong.
- Protect the question and answer period
- Close the event

**Understand the goals or mission for the panel.** The sponsoring organization sets the goals. What do they want the panel to accomplish? What do they hope will be achieved? Do they want the audience to understand more about a particular topic? Do they want the audience to be able to make a better-informed choice among alternatives?

Panels are typically used to educate or inform the audience about some topic or issue. Panelists may present different but not necessarily competing perspectives. For example, a panel on “Oklahoma City in the 21<sup>st</sup> Century” could have participants who each address a different focus: one on business, one on education, one on health. A panel such as this is purely informative, more of a serial presentation than a discussion among panelists.

Another panel might present several different perspectives around the same general topic. For example, a panel on health care tort reform could have an insurance executive, a malpractice attorney, a hospital administrator, a physician, a patient, or some combination of those. A panel such as this may well be adversarial as well as informative.

A third common type of panel is a forum for competitors, such as all the candidates for mayor, and such a panel will also often be confrontational.

**Set the structure.** Work with the sponsor to design a format for the panel that will achieve their goals and is realistic.

**Format:** There are typically four components to each panelist's time: an introduction, an overview, the content, and a question and answer period. These four parts may be sequential for each presenter or they may be performed in a group sequence: all the presenters are introduced at the beginning and all the questions are held till the end.

- **The introduction:** The moderator may introduce the panelist, some other person may introduce the panelist, or the panelist may do a self-introduction. The introduction should briefly establish the panelist's credentials to be on this panel. Typically, the moderator introduces the panelists. Many moderators prefer to name each panelist, with a phrase at most about why he or she is part of the panel, at the beginning of the event, and to give a brief but more complete introduction of each panelist when that panelist is up for the first time.
  - Practice pronouncing any names: those of the panelists, of the sponsoring organization, of the topic.
  - Call the presenter's secretary and explain you want to say his or her name correctly and ask for tips, if it's a difficult name.
  - Make rhyming reminders if possible: "Bitsche" rhymes with "peachy," "Laster" (not "Lassiter") rhymes with "plaster." "Napoliello" sounds like "Napoleon" and "yellow."
  - Correct yourself if you make a mistake. *"Leadership Oklahoma City. Leadership Oklahoma City. Leadership Oklahoma is a fine organization, I'm sure, but today it's Leadership Oklahoma City."*
- **The overview** gives the audience the information it needs to understand the panelist's remarks. It may be a short explanation of what the panelist does or what his or her company does. It may be a history of how the panelist got to this position. It may be a primer of technical terms or ideas the audience needs to understand the succeeding remarks.
- **The content** is what the panelist is really there to say: what he believes will happen, what he believes should happen, why you should vote for him.
- **The question and answer period** is essential, and it is too bad it is so often cut short or eliminated. It is in the question and answer period that the audience can clarify or synthesize information.

**Timing:** Begin with the end in mind. When is the panel scheduled to conclude? Work backwards from that time. Many moderators say that an absolute minimum of 15 minutes must be allotted for each panelist in order to have time for each of the four components. More time is usually better, depending on the topic. Three panelists, that is, would require a minimum of 45 minutes, so if the event is scheduled to conclude at 1:15, the panel must begin no later than 12:30.

A timekeeper can be a great help to the moderator, someone in his or her line of sight who subtly indicates when time is about up. It allows the moderator to focus on what the presenter is saying without overtly watching the time.

**Inform the panelists** well before the panel commences of the goals and structure for the event. If the panelists are prepared properly, they can prepare properly. You do not want a panelist to bring a 20-minute PowerPoint overview when he will only have 20 minutes to speak.

Both the moderator and the panelists should know why each panelist was included. What is the special perspective or information this panelist is expected to present? Panelists should know who is going to introduce them, or if they will be doing a self-introduction, how long they will have to do so. They should know the order of presentations, and if questions and answers are permitted during or after their presentation or all held till the end. They should know what the room set-up will be, what technology is available to them, and who their audience will be. Tell them if there are "special" audience members—members of the press, hearing-impaired attendees, somebody's ex-spouse who hates him or her. Talking

with the panelists prior to the event also gives the moderator an opportunity to form a friendly relationship with all the presenters.

**Set the tone.** The moderator can control the tone of the event. If the event is likely to be confrontational, the moderator should adopt a serious, professional demeanor. If he or she is perceived as unbiased and fair, it will be much easier to direct or redirect the flow. Humor can be very effective in keeping the tone of a panel more informal, but the moderator should take care not to embarrass anyone or to make humorous remarks that indicate he or she believes a particular negative opinion is shared by everyone present. (Remember the Dixie Chicks!)

**Keep it lively.** Repetition is a death knell for panels. The moderator should remind panelists before the event begins that the limited time demands new and different information from each presenter, not lengthy *“I agree with the other panelist on this issue and here’s my take on it in my own words.”* Avoid having each panelist answer the same question unless they are likely to have a totally different point of view or new information.

**Control the event.** The audience and panelists rely on the moderator to control the event. It is the moderator’s responsibility to make sure each panelist has a fair shot at the time and to keep one panelist from dominating. Keep in mind, however, that there is a fine line between control and over-control, between moderating and dominating, between making it fun and making it silly.

**Control the time.** The moderator is in charge of keeping to the schedule. Allowing a presenter to go long or an audience member to interrupt steals time from the other presenters or audience members. Be ruthless (but polite.) *“Mr. Jones, forgive my interruption, but in the interest of hearing from everyone, we need to move on to our next panelist. Can you wrap up your statement, please?”*

Tell everyone ahead of time what the time constraints are: *“We have only 5 minutes per panelist for introductory remarks.”*

Give a warning when time is about to expire and the speaker does not seem to be finishing. Don’t be afraid to break in and remind a speaker, *“You have just two more minutes.”*

Use cards with a time countdown if appropriate—have a timer who sits in plain view of the panelists (but preferably not in view of the audience) who holds up time cards for the speakers.

**Control the audience.** The moderator must also control the audience. Do not allow audience members to give a long-winded preamble to a question. Polite interruptions can include: *“Please excuse my interruption, but we need to get to your question.”*

### **Intervene when things go wrong.**

Be prepared to call time on a questioner or the panelist answering a question by interrupting:

*“We need to move as quickly as possible so more folks will have a chance to ask question. What is your question?” “Dr. Smith, we appreciate your answer to that question. Does anyone have another question?”*

Be prepared to step in if an audience member becomes abusive. It is often such a shock when it happens that the moderator is unprepared to act quickly. Practice a few approaches ahead of time. If someone verbally attacks someone, the moderator should break in immediately: *“Excuse me. Excuse me. We are all friends here and we all want to learn as much as possible. Let’s take a collective deep breath and re-focus on how we can improve health care.”* Keep talking and if necessary move toward the offender until

you regain control. Once you have control, turn away from the offender and direct attention to the panel or another audience member. Restate the rules and move on: *“As we stated earlier, our question and answer period is for asking for information, not giving your point of view. There in the second row in the green shirt, do you have a question?”*

**Protect the Question and Answer Period.** The question and answer period is a vital part of a panel presentation, and its time allotment should be protected by the moderator. In addition to allowing for clarification and expansion of points made during the presentation, the q-and-a session is the only opportunity for the audience to participate actively. Questions also confirm to the presenters that the audience has been listening and are interested. Any presenter will tell you that *“Well, if there are no questions, I’ll thank our presenters”* is the worst possible evaluation of an event. The moderator of a successful event makes certain there is time for questions and that there are questions.

The method of permitting the panelists to answer questions should be decided ahead of time, and the panelists and the audience should be informed at the beginning of the session what that process will be:

Methods include:

- Questions taken from the audience after each speaker’s time
- Questions taken from the audience after all presenters have spoken
- Written questions from the audience that the moderator will read
- Other methods, such as written questions submitted prior to the event.

Ask the audience for its cooperation to make sure all goes smoothly.

- Request that people ask questions rather than make comments.
- Ask that questions be directed to one panelist instead of asking each panelist to respond separately. However, keep in mind that audience may not know which presenter is best to answer a particular question, so you may need to ask panelists to decide who answers a question. *“You’ve been asked how the child welfare department works with the health care industry. Would one of our panelists volunteer an answer?”*
- Ask that audience members limit themselves to one question unless no one else wishes to ask a question.

**Develop your own questions** so that you can start the ball rolling if no questions arise immediately from the audience. As you listen to the presentations, make notes on questions you could ask. You may also ask the panelists ahead of time about common questions they field.

Some moderators plant questions in the audience to insure that questions will be asked. If members of the sponsoring organizations are tasked in advance to ask questions, they can also develop questions as the presentation occurs.

If, when the moderator asks for questions, several hands shoot up, the moderator should not usurp the audience’s time for questions with one of his or her own unless the moderator has a concern that an important issue has been misunderstood in some way.

Make certain that all audience members can hear the question. If a microphone is not used, the moderator should repeat the question. Don’t forget that people seated behind an audience member often cannot hear even though it seems quite audible to those in front.

**Close the event.**

As moderator, it is appropriate for you to make a closing summary statement—a very brief statement. You might restate the purpose of the panel and one quick echo of something each panelist said:

*We came here today to learn about pressing health care issues in our community, and we certainly have. Dr. Abel reminded us that smoking is the number one preventable cause of many illnesses and early deaths and Dr. Cain wittily pointed out that the Legislature has its work cut out for it in the next session. Dr. Baker's poignant stories of teenage accident victims will remain with us all. As voters and as individuals, we all have responsibility for improving our health.*

If there are provisions for activities after the panel, give specific instructions for those.

- Will one or more of the presenters be available in the lobby to answer questions or sign books?
- Is there a sign-up sheet on the registration table to be sent additional information?
- Has everyone paid for their lunch?

Thank the panelists and ask the audience to thank them once again.

*I know this audience will want to join me in expressing our appreciation for the time our panelists have given us today.*

#### **General Do's for Moderators**

- **Prepare.** No matter how experienced you are at moderating panels, you will do a better job if you prepare.
- **Smile.** A friendly tone of voice when you ask hard questions or exert control will keep from painting you as the dictatorial moderator and the offender as a victim.
- **Intervene** when necessary. We've all been taught it's rude to interrupt, but moderators must protect the rights of the panelists and of the audience. Do not allow personal attacks, domination by one person, or time-stealing.

#### **General Don'ts for Moderators**

- Do not make or permit long introductions.
- Do not give your own opinion or interject your beliefs or expertise. To do so reduces your persona as an unbiased, neutral facilitator.
- Do not answer questions from the audience directed at the panel. You are not the expert presenter. You are the expert moderator.



## LAP Project Proposal

The LOYAL Project Committee invites interested community organizations to submit this Proposal for a LOYAL Action Project.

**Proposals are due by 5 p.m., September 15, 2009.**

Mail to: **LOYAL Project Committee, Leadership Oklahoma City, 1112 NW 23<sup>rd</sup> St., Ste 119, Oklahoma City OK 73106**

The LOYAL Project Committee will select the LOYAL Action Projects (LAPs) and notify all applicants of their status no later than October 15, 2009. Questions? Contact LOKC Executive Director Beth Shortt at (405)528-5652 or [info@lokc.org](mailto:info@lokc.org).

**Organization Name:**

Address:

Mailing Address if different:

Mission Statement of Organization:

### CONTACT INFORMATION

Please have the Chief Staff Person, the President or Chairman of the Board of Directors, and the Organization's Liaison to the project sign in the appropriate spaces, signifying that they have read the Proposal and agree with its intent.

Chief Staff Person's Name and Title:

Phone:

Fax:

E-Mail:

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Signature of Chief Staff Person

President or Chairman of the Organization's Board of Directors Name:

Company

Address

Phone:

Fax:

E-Mail:

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Signature of President or Chairman of the Board of Directors

**Partner Organization Liaison** (Person who will serve as your organization's liaison to the LOYAL team. ***The Liaison should have a thorough knowledge of your organization and be committed to meeting regularly with the LOYAL LAP team, November through April.***

Name:

Liaison's Mailing Address:

Phone:

Fax:

E-Mail:

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**Signature of Liaison**

**PROJECT INFORMATION**

**Project Issue Area (health, literacy, arts, etc.):**

Description of Project: *Please describe what you want the LOYAL Action Project Team to do.*

What **SPECIFIC** outcomes will demonstrate success for the project? The more measurable the outcomes, the better.

Fundraising Specifics: *Fundraising is to be limited. If your proposal will require fundraising by the LAP team, please provide specific information regarding the fundraising component (i.e., type of fundraising, amount to be raised, how funds will be used, expected target donors, similar requests (if any), and any other information that you deem necessary).*

How will this project benefit the work of your organization?

Are there potential challenges to this project, and if so, what are they?

How many hours of planning and implementation do you estimate will be needed for successful completion?

If applicable, how will this project or initiative be carried out in the future?



LOYAL Class 5 Weekly Update

April 5th

Hey LOYAL Class!

Here is what's coming up this week! Plan to hit up Southside Louie's after class Tuesday!  
**If you haven't paid for T-shirts please bring money to class tomorrow!**  
**I am looking for 5 and 10K legs for the women's relay. If anyone is interested you'll be saving me from running half of it myself! Let me know!**

Kristen Vails

**Community Events**

*The Plaza District is hosting an Easter Egg Hunt for the kiddos at LIVE on the Plaza April 9th. Anyone who can bring bags of candy or plastic eggs to class on April 6th, please do!*-Kristen

**The Leadership Oklahoma City Alumni Board invites you and your guest(s) to a Watch Party for the 10th Anniversary of the OKC Memorial Marathon**

**When?** Sunday, April 25, 2010  
8:30 a.m. - noon for beer, fun and festivities  
(Racing begins at 6:30 a.m. Half-marathoners should be approaching the finish line around 8:30 a.m.)

**Where?** Finish Line location TBA  
This is also an LOKC CLASS COMPETITION! Not only is this an opportunity to rally with your classmates but it is your chance to prove once and for all which is the Best Leadership Oklahoma City Class EVER!

**Volunteer Opportunities**

OKC Beautiful is looking for Arts festival volunteers for their Green Team at the Festival of the Arts, April 20 - 25. (OKC Beautiful Lap Project) They are looking for 10 volunteers per shift, 5 Action and 5 Education. Shifts are 11:00-2:00 and 5:00-8:00, Tuesday through Saturday and 11:00 - 2:00 on Sunday.

**Social Opportunities & Announcements**

**Salsa Social**  
When: April 10th, Saturday from 10 p.m. to 1:30 a.m.  
Where: I-Dance Studio @ 3001 NW 73rd St, OKC  
What to bring: \$5 for cover and BYOB  
Come on out and bring your friends!  
(Our fearless L5 leader Mike Biddinger said he will be joining us!)

**LOYAL Upcoming Events**



Next Session- April 6th  
Closing Retreat- April 11th  
Marathon-April 25th  
Graduation April 29th

**Quick Links**

[LOYAL 5 Facebook](#)

[LOYAL 5 Twitter](#)

[LOKC](#)