

# The Oklahoma Business Ethics Consortium



ENTERING OUR ELEVENTH YEAR OF PROMOTING OKLAHOMA VALUES OF INTEGRITY AT WORK!

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## AGENDA • SEPTEMBER 10<sup>TH</sup>, 2015 • TULSA CHAPTER

### I. Welcome & Kudos

*Lynn Flinn, President of The Rowland Group; Tulsa Founder of OK Ethics*

### II. Upcoming Events

*Lynn Flinn, President of The Rowland Group; Tulsa Founder of OK Ethics*

Advance reservations are required for all events. Visit [okethics.org](http://okethics.org) for more information!

### III. Membership Drive Underway

*James Kelley, The Rowland Group; Membership Chair, OK Ethics*

Our new fiscal year starts October 1. Please join our pacesetters who have already re-committed: Special thanks to **Chesapeake, Devon, Hobby Lobby, SandRidge, American Fidelity Assurance, Career Development Partners, WPX Energy, PriceWaterhouseCoopers, Citizen Potawatomi Nation, Enterprise Holdings, Kimray, Inc., Matrix Services, Valir Health** and many others who are actively promoting Oklahoma values of integrity at work!

*Must join by October 2 to be included in annual Membership Guide.*

### IV. Discussion Topic

- How does manipulation manifest itself in the workplace (e.g. specifically in terms of measurable impact on business operations)?
- What positive, ethical examples have you witnessed of others who have successfully confronted manipulation?

### V. Guiding Principle & Introduction

*Michael Oonk, American Bank & Trust Co., Programs Committee, OKEthics*

### VI. Keynote

**“Manipulation: Tips to Stop Getting Tricked”**

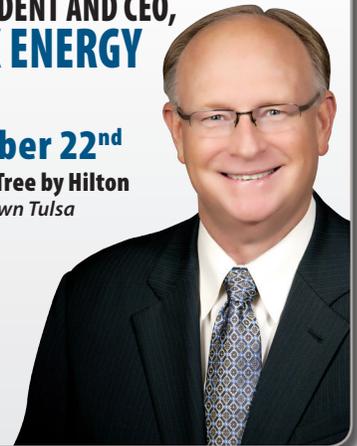
*J. D. Taylor  
Senior Master Trainer  
Vital Smarts*

See pages 7 & 8 for Mr. Taylor's bio and program outline.

### UPCOMING EVENTS

**RICK MUNCRIEF**  
PRESIDENT AND CEO,  
WPX ENERGY

**October 22<sup>nd</sup>**  
DoubleTree by Hilton  
Downtown Tulsa



**TRUTHFULNESS, FAIRNESS,  
& STANDARDS OF DECENCY:  
PERSPECTIVES ON ETHICS  
FROM MEDIA LEADERS**

**Ted Streuli**  
*The Journal Record, Editor*  
**Susan Ellerbach**  
*The Tulsa World, Executive Editor*  
**Jim Langdon**  
*TulsaPeople, Publisher*  
**Moderator: Barrett Waller**  
*Waller & Company, President & CEO*

Co-Sponsored By:  
**PRSA** Public Relations Society of America  
Tulsa Chapter

**November 18<sup>th</sup>**  
DoubleTree by Hilton  
Downtown Tulsa

**Did you know that 501c3, non-profit organizations can join for free at the Frontier level?**

*Vision: To be recognized as a statewide and national forum for promoting business ethics.*

**REMINDER: PLEASE PICK UP CPE'S AT CONCLUSION OF EVENT.**

#### PINNACLE MEMBERS



#### NAVIGATOR MEMBERS



#### MEDIA ALLIES



#### STAR MEMBERS



# REMINDER: PLEASE PICK UP CPE'S AT CONCLUSION OF EVENT.

## APPRECIATION:

OK Ethics relies primarily on volunteers to achieve the organization's successful pursuit of Oklahoma's values of integrity at work. It takes leadership and teamwork to host these exciting events and we salute your dedication in achieving OK Ethics' mission! Listed below are today's volunteers who consistently provide service to our members:

## AGENDAS:

We need help from individuals willing to print future agendas. Please contact Lynn Flinn at [lynn@rowland-group.com](mailto:lynn@rowland-group.com)

## VOLUNTEERS-AMBASSADOR TEAM:

These friendly people welcome our guests each month and assist in helping them locate seats. They also arrive early to help distribute agendas and assist with name tags.

<b>Karie Mullins</b>	NORDAM	Chief Ambassador
<b>Heather Vance</b>	NORDAM	Ambassador
<b>Mark Belanger</b>	ONE Gas, Inc.	Ambassador
<b>Shelly Gallaway</b>	ONE Gas, Inc.	Ambassador
<b>Laurie Rosenbaum</b>	ONE Gas, Inc.	Ambassador
<b>Amber Waid</b>	ONEOK	Ambassador
<b>Tori Childers</b>	The Rowland Group	Ambassador
<b>Stephanie Pitt</b>	The Rowland Group	Ambassador

## VOLUNTEERS-REGISTRATION TEAM:

These dependable individuals diligently record our guests' attendance and handle the collection of fees:

<b>Alicia Goodloe</b>	The Bama Companies, Inc.	Registration & Volunteer Coordinator
<b>David Christie</b>	The Bama Companies, Inc.	Registration
<b>Vanessa Statum</b>	Career Development Partners, Inc.	Registration

## SPECIAL INITIATIVES:

<b>Susie Wellendorf</b>	Wellendorf Communications	PR
<b>Michael Oonk</b>	American Bank and Trust	Facilities & Logistics
<b>Lynn Flinn</b>	The Rowland Group	Tulsa Chapter Founder & Programs
<b>James Kelley</b>	The Rowland Group	Membership
<b>Travis Jones</b>	Career Development Partners	Programs
<b>Nick Minden</b>	Darby Equipment	Programs
<b>Tom Vincent</b>	Gable Gotwals	Programs
<b>Susan Pate</b>	Stinnett & Associates	Accountant

## OTHER INITIATIVES:

<b>Jalisha Petties*</b>	OK Ethics	Member Care Coordinator
<b>Anna Rosenthal*</b>	Accounting Principles	Notices & Special projects
<b>Tawni Phelan*</b>	Factor 110	Name Tags and Guest Services

\*Paid Service Provider

## HELP WANTED:

Volunteers to print the monthly agenda. Please contact either Lynn Flinn at [lynn@rowland-group.com](mailto:lynn@rowland-group.com) or Shannon Warren at [warrenokla@cox.net](mailto:warrenokla@cox.net).

Ambassadors to welcome and assist guests at monthly events. Please contact either Karie Mullins at [legalmullins@cox.net](mailto:legalmullins@cox.net) or Alicia Goodloe at [AGoodloe@bama.com](mailto:AGoodloe@bama.com).

## MANY THANKS TO OUR HORIZON MEMBERS:



# WANT TO BE PART OF THE TEAM THAT HELPS OK ETHICS FLOURISH?

*Please contact these leaders to see how you can help.*



*Alicia Goodloe, Volunteer Coordinator for Oklahoma Business Ethics.* We are grateful for Alicia's dedication as she has maintained a consistent commitment to OK Ethics since 2009, where she is often found pleasantly greeting our guests at the registration table.

Alicia has been employed with The Bama Companies, Inc. for 18 years and has served in her role as a Paralegal for 8 years. She also volunteers on the Board for the Tulsa Day Center.

Here's what Alicia says about her role with OK Ethics:

*"Oklahoma Business Ethics has contributed to my growth professionally and ethically. It is truly a joy to greet meeting attendees with a smile, as I check them in for monthly meetings. I enjoy meeting new people and seeing the same familiar faces at registration. I am honored to help OK Ethics and promote its mission in any way I can."*

***If you would like to assist OK Ethics with registration, please contact Alicia at 918-732-2163 (Phone) or via email at [agoodloe@bama.com](mailto:agoodloe@bama.com).***

Hint: We could really use help from the accountants in our group!



**Karie Mullins serves as the Chief Ambassador for the OK Ethics ambassador team in Tulsa.**

She arrives early (10:45 a.m.) to prepare for guests and organize her team. The ambassador team is responsible for greeting visitors, distributing agendas, handing out name tags, and seating guests. They are the first smiling faces you see at the luncheons! ***If you are interested in helping, please contact Karie via email at [legalmullins@cox.net](mailto:legalmullins@cox.net).***

Karie is a native of Joplin, Missouri. She is the Senior Manager of Compliance & Integrity at NORDAM. With 26 years of experience in the legal field, she is a Certified Compliance & Ethics Professional, a member of the Society of Corporate Compliance and Ethics, and holds degrees in Political Science and Paralegal Studies. She is a highly driven individual who thrives on helping others. Karie is celebrating her 15th wedding anniversary this year and is the proud parent of three boys.

# GUIDING PRINCIPLES

Adopted July, 2004

To ensure that the Consortium fosters positive characteristics of integrity in the successful achievement of its goals, these Guiding Principles were discussed and adopted (with revisions) during a milestone planning session held by Consortium leaders in Stroud on June 18, 2004. These principles were developed based on the Character First's values and philosophies.

## RESPONSIBILITY TO SELF AND OTHERS

### Service

- Passion for promoting ethics and integrity
- Encouraging the promotion of ethical behavior through personal actions and
- Sharing ideas and resources
- Responsibility and accountability for fulfilling the mission of the Consortium.

### Collaboration

- Achievement of common goals through the promotion of ethical, mutually beneficial relationships
- Service to the Consortium over promotion of self-interest
- Cooperation emphasized over competition in promoting ethical business conduct
- Members collaborate by being constructively engaged in discussions regarding ethics
- Seeking consensus in interactive discussions regarding ethical matters.

### Respect

- Members may become aware of confidential information shared by others in an effort to determine an ethical course of action. We ask members to be sensitive in recognizing and respecting the efforts made toward achieving ethical behavior. In that vein, public disclosure of this information is discouraged.
- We respect other members and the process by:
  - Exhibiting listening skills and actively listening to discussions
  - Being open to other points of view and outcomes
- We are an inclusive organization and demonstrate this by welcoming members who are in different stages of learning as applied to ethical behavior.

## LEAD WITH INTEGRITY

### Dependability

- Members are asked to demonstrate their support of this initiative by consistently attending meetings.

### Initiative

- Recruiting other members who have demonstrated a desire to promote ethical behavior in their organizations.
- Recognizing what needs to be done to help promote the Mission of the Consortium and taking action to assist in that effort.

### Honor

- Members are asked to honor the Consortium through the practice of integrity and ethical behavior in their business dealings.
- We express gratefulness to our hosts, sponsors and speakers; as well as to those whose volunteer service makes OK Ethics a stronger organization.
- Realizing that each of us is in a mode of continual learning, we demonstrate humility, care and compassion when sharing our thoughts and knowledge.

### Courage

- Speak the truth with confidence and encourage others to do the same.

## INSPIRE TRUST

**We serve and promote the cause of truth with integrity, objectivity and fairness to all persons.**

- We hold ourselves accountable by consistently honoring our word.
- We extend trust abundantly to those who have earned it.
- Trust, once earned, will not be taken for granted, manipulated or abused.

**Visit [okethics.org](http://okethics.org) for resources, videos, articles and to see who's who.**



**Like us on  
Facebook.**



REMINDER: PLEASE PICK UP CPE'S AT CONCLUSION OF EVENT.

# MANIPULATION: TIPS TO STOP GETTING TRICKED

**J. D. TAYLOR**  
Senior Master Trainer  
Vital Smarts



## About our Presenter:

Taylor has been engaged in the work of changing lives for nearly 30 years. Starting as a part-time factory worker, he advanced through levels of leadership and positions at FranklinCovey, one of the pre-eminent personal and organizational change companies in the world. After 20 years of service, Taylor left the organization to serve as CEO of SymbolArts, which sells public safety products worldwide. In 2010, he and his family launched their own small business, a self-serve frozen yogurt bar, near their home in Utah.

## More...

- **FranklinCovey**—FranklinCovey is the global consulting and training leader in the areas of strategy execution, customer loyalty, leadership and individual effectiveness. Clients include 90 percent of the Fortune 100, more than 75 percent of the Fortune 500, thousands of small- and mid-sized businesses, as well as numerous government entities and educational institutions. FranklinCovey has 46 direct and licensee offices providing professional services in 147 countries.
- **SymbolArts**—From 2007–2010, Inc. 5000 ranked SymbolArts on its annual ranking of the 5000 fastest-growing private companies in the country. SymbolArts sells public safety products in all fifty states and internationally. SymbolArts has operated in this market sector for 17 years and continues to be the leader in jewelry quality badges and insignia. SymbolArts has also developed within two other significant markets - corporate recognition and commemoratives, and special event licensing (such as the Olympic Games, NCAA, and State and Local Government Commemorations).
- **YOGOTOGO** – The Taylor family and their Kaysville-based Yogotogo are just one of the reasons why Utah is bucking the unemployment trend. Not only is the Beehive State's unemployment rate significantly lower than the national average — around 7.2 percent as opposed to 9.5 percent nationally — but it has added more than 12,000 jobs since June 2009. At least a few of those jobs can be attributed to JD and Amy Taylor.

The Taylors had observed the frozen yogurt craze sweeping through California while on a family vacation. He and Amy felt a shop like those they visited would be a good fit for Utah. This started an intense period of planning and research to check Utah's frozen yogurt market and determine how their own shop might do. All the work paid off when the Taylor family opened Yogotogo in Kaysville early last summer. Yogotogo is a self-serve frozen yogurt bar that offers 60 rotating flavors of yogurt, 10 at a time. Guests can fill a cup with as much yogurt and as many toppings as they want then pay by the ounce. Guests create their own quality yogurt treats with premium yogurt, fresh fruit and name brand toppings.

One of the distinguishing characteristics of Yogotogo is that it opens at 9 a.m. to serve the breakfast crowd. The Taylors have developed several blended yogurt drinks, such as the On-the-Go-Yo, for customers on their way to work, and the Pro Yo, which is a protein shake mixed with yogurt and great for frequent gym attendees. The Taylors have worked hard to create a comfortable environment. They wanted Yogotogo to have a more conversation-friendly vibe so they decided against installing large TV screens in their shop. And the effort seems to be working.

Although launching a new company is never easy, JD and Amy say opening Yogotogo was exciting during challenging times. It kept them engaged in something positive and helped them move forward. They hope to help their customers have a positive experience during each and every visit.

***This program is recommended for  
1 CPE in ethics at the basic level.***

\*From time to time, almost everyone finds themselves in a situation where they are being tricked into doing something undesirable. As outlined above, this program will provide ten steps to get at the truth of the situation. Note that it is up to the individual attendee to demonstrate relevance to his/her own area of practice. OK Ethics makes no guarantees.

## GENERAL PROGRAM DISCLAIMERS:

**LEGAL:** Members of the Oklahoma Business Ethics Consortium frequently share information concerning various issues and developments that may have legal implications. The discussions, commentary, and handouts at Consortium meetings or presentations to other organizations are for general informational purposes only. They cover only some aspects of the subject topic, and do not constitute a complete legal analysis of the topic or how it might apply to any particular set of facts. Before taking any action based on information presented during a Consortium event, participants are encouraged to consult a qualified attorney.

**CPE'S:** From time to time, Continuing Professional Education credits are offered. Because OK Ethics relies heavily on volunteers to provide these, we do not have the manpower to send certificates after the program is completed.

**REMINDER: PLEASE PICK UP CPE'S  
AT CONCLUSION OF EVENT.**

**PHOTOGRAPHY:** Occasionally, photos of the event are made and these may be posted on the OK Ethics website or Facebook page. By attending the program, participants tacitly understand and agree to this process. If preferences are otherwise, please notify us at okethics@yahoo.com or call (405) 889-0498 and we will be happy to comply with your wishes.

## PRESENTATION STANDARDS:

The observations and comments of presenters at Consortium meetings and networking are the views and opinions of the presenter and do not constitute the opinion or policies of the Consortium or any of its members. Presenters are respectfully requested to honor OK Ethics Guiding Principles as well as avoid profanity, preaching, politics, put-downs and self-promotion during their lectures. To ensure accountability, participants are invited to evaluate each program according to these and other standards.

# **PROGRAM HIGHLIGHTS:**

## ***MANIPULATION: TIPS TO STOP GETTING TRICKED***

- 1. Build Fences**
- 2. Tell Yourself the Whole Vivid Story (Minimize the Behavior and/or Minimize the Consequences)**
- 3. Clarify Boundaries**
- 4. Make the Invisible Visible (Hidden Victims)**
- 5. Tell the Rest of the Story – Three Clever Stories (Dehumanize Victims)**
- 6. Separate Facts from Stories**
- 7. Use Contrasting**
- 8. Change Your Space**
- 9. Start with Natural Consequences**
- 10. Create Mutual Purpose**
- 11. Moral Justification**