

Burt Bertram, Ed.D.

Licensed Mental Health Counselor • Licensed Marriage & Family Therapist

Specializing in facilitating dialogue, building trust and resolving conflict within complex and complicated relationships

Current Private Practice

Counseling & Consulting

Adults

Relationship issues
Life and career transitions
Trauma recovery: crime or accident
Professional burnout

Couples: Marital or Life Partner

Communication
Conflict Resolution
Infidelity
Reconciliation
Separation and/or divorce

Remarriage and Blended Families

Impact of former spouse
Impact of children
Blending styles and values

Families and Teens

Conflict and power struggles
School adjustment / success
Emotional intelligence
Anger Management

Training

Seminars and Workshops
Interpersonal Communication and Legal/Ethical Issues in Counseling

Organization Consulting & Group Process Facilitation

Consultant and group process facilitator to teams, groups, organizations (public & private) boards and communities regarding a wide range of issues and concerns (e.g., planning/goal setting, communication, and conflict resolution)

Current Employment

Physician Support Services, Florida Hospital, Orlando, FL (2009 – Current)

Staff Psychotherapist & Consultant providing psychotherapy, support and development to physicians

- Personal & Relationship Counseling
- Coaching & Consultation
- Group Facilitation: Leadership Retreats / Finding Meaning in Medicine Groups
- Writer/Researcher

Rollins College – Graduate Studies in Clinical Mental Health Counseling

Winter Park, Florida (1994 – Current)

Adjunct Professor or Visiting Professor

- Counseling Process & Skills
- Group Dynamics
- Ethical & Legal Issues in Counseling
- Community Resources & Crisis Intervention
- Family Therapy
- Couples Counseling
- Practicum in Mental Health Counseling
- Internship in Mental Health Counseling

Education**Doctor of Education** (Ed.D. Counseling), 1987

Specialization: Consultation

University of Florida, Counselor Education Dept (CCREP-Accredited)

Master of Education (M.Ed. Counseling), 1974

University of Central Florida

Bachelor of Science (B.S. Social Science Education), 1968

Florida Atlantic University

Professional Licenses**Marriage & Family Therapist**

Florida License #MT145 – Licensed in 1982

- Qualified Supervisor

Mental Health Counselor

Florida License #MH863 – Licensed in 1983

- Qualified Supervisor

Previous Professional Experience**1972-1977: The Green House Family Counseling Center, Orlando, FL**

Family Counselor and Clinical Director

1993 - 1977: Private Practice

Group Practice: 1993 – 1997:

Inner Change Facilitators

Group Practice: 1991 – 1993:

The Center for Counseling & Consulting

Solo Practice: 1985 – 1991:

Burt Bertram, Counseling & Consulting

Group Practice: 1979 – 1985:

Bertram & Curtis

Solo Practice: 1977 – 1979:

Burt Bertram Counseling

Professional Association Affiliations & Leadership**American Counseling Association (ACA)**

Professional Member since, 1974

1991 - 1984 Insurance Trust (Chair 1989 - 1987)

1991 - 1989 Credentialing Committee (Chair 1991 – 1989)

1990 - 1989 Professional Affairs Committee

1986 - 1985 Counselor Image Task Force

Florida Counseling Association (FCA)

Professional Member since, 1973

1986 - 1983 Board of Directors

1985 - 1984 President

Florida Mental Health Counselors Association (FMHCA)

Past-President: 1983 – 1984

American Association for Marriage & Family Therapy (AAMFT)

Clinical Member (1990)

Florida Association for Marriage & Family Therapy (FAMFT)

Clinical Member (1990)

Central Florida Association for Marriage & Family Therapy (CFAMFT)

Professional Member (1985)
1995 - 1996 President

Association for Specialists in Group Work (ASGW)

Professional Member (1995)
Coordinator, Mentoring Project (2004-05)
Chair, Marketing Committee (2005-08)
Board Process Observer (2013-2014)

Awards & Honors

Distinguished Service Award

Central Florida Association for Marriage & Family Therapy (2013)

Fellow

Association for Specialists in Group Work (2008)

Publications (Print and Electronic)

Year	Modality	Title/Publisher	Description
2013			
In press	Book Chapter	The intersection of law, ethics, and institutional policy. In Herlihy, B. and Corey, G. ACA Ethical standards casebook (7th ed). Bertram & Wheeler American Counseling Association	
April	Online	Antidotes to Burnout: Fostering Physician Resiliency, Well-Being and Holistic Development Paolini, Bertram, and Hamilton Medscape Psychiatry - Online	The article provides a summary of the impact of Physician Support Services, an innovative whole-person support program for physicians and family members at Florida Hospital, Orlando, Florida. The philosophy of the program, services provided and the economic impact (cost savings) to the hospital are discussed.
2012			
	Book	The Counselor and the Law: A Guide to Legal and Ethical Practice (6th ed.) Wheeler & Bertram American Counseling Association	Book was completely revised including the addition of a Legal/Ethical Decision Making Model, and two new chapters: Communication Technology and Social Media, and Counselor Education and Supervisor Issues & Concerns
2011			
September	Book Chapter	Ethics & Legal Issues for Group Work Chapter in <i>Group Work and Outreach for College Counselors</i> , Fitch & Marshall American Counseling Association	Group work, like every professional activity provided by mental health professionals is filled with ethically challenging situations. Group workers have a responsibility to design and implement groups that address real needs and are intentionally constructed to deliver desired outcomes.
2009			

Winter	ASGW Newsletter Group Work Practice Ideas	<i>Re-Norming a Permanent Group: Applying group principles to the reinvention of a workplace leadership group</i> ASGW	How can longstanding group norms intentionally be changed in an intact and on-going workplace group? This article provides a summary of a group work consulting project that addressed this issue and includes suggestions for using group work skills to respond to the needs of a leadership group in a business setting.
2007			
July	Book	<i>The Counselor and the Law: A Guide to Legal and Ethical Practice (5th ed.)</i> American Counseling Association	Integrating legal issues with the new 2005 ACA Code of Ethics, attorney Nancy Wheeler and counselor Burt Bertram guide the reader through the tangle of state and federal laws that regulate and/or affect the practice of professional counselors and other mental health professionals.
2006			
November	Audio CD	<i>Risk Management Strategies</i> ACA-Insurance Trust (Available January 2007)	Seventy-five minute audio recording highlighting 13 Risk Management Strategies for professional counselors co-written and recorded with attorney Nancy Wheeler. Distributed by ACA Insurance Trust.
2002			
May	Audio CD	<i>Risk Management Strategies</i> ACA-Insurance Trust	Sixty minute audio recording highlighting 10 Risk Management Strategies for professional counselors co-written and recorded with attorney Nancy Wheeler. Distributed by ACA Insurance Trust.
2001			
January	ASGW Newsletter Group Work Practice Ideas	<i>Defining Moments in Group Work</i> <i>The ASGW Group Worker Newsletter</i> (Practice Ideas)	Groups are filled with defining moments; some are easy to recognize, others pass by before they can be captured. The facilitator's best strategy is to ride the moment like a surfer rides a big wave – accept it for what it is – make the most of it – trust the process – and trust yourself.
May	Electronic On-Line Seminar	<i>Professional Renewal and Resiliency</i> CEU Professional, Inc.	The focus of this on-learning is for practitioners experiencing or concerned they may experience some diminished functioning; and have a desire to address actual/potential loss of professional commitment before it leads to impairment. Seminar topics include:

			<ol style="list-style-type: none"> 1. Working Definition of Burnout / Brownout 2. Self-Assessment of Burnout / Brownout 3. Factors and Dynamics that Invite Burnout / Brownout 4. Professional Renewal: Twelve Activities 5. Building Professional Resilience: Ten Strategies
2000			
July	Electronic On-Line Seminar	<i>Legal Aspects of Counseling</i> Nancy Wheeler, (Co-author) ACA	This seminar, one of the first online seminars offered by ACA, was designed to provide risk management education to counselors and other mental health professionals. It was built around the <i>Legal Aspects in Counseling</i> seminar that had been presented Bertram & Wheeler more than 75 times in cities throughout the country.
1996			
July	Book Chapter	<i>Careers in Private Practice</i>	Collison & Garfield (Editors), <i>Careers in Counseling and Human Services</i> (1996), Taylor & Francis

Professional Presentations: Conference and/or CEU Seminar (1996 – 2013)

Year	Association/ Organization	Presentation Title	Presentation Description
2013			
Sept	Florida Hospital Flat Tops Wilderness Area, Colorado	<i>Physician Leadership Retreat & Backpacking</i> Burt Bertram, Ed.D. Herdley Paolini, LP	Drs. Herdley Paolini and Burt Bertram co-facilitated 15 hours of Continuing Medical Education coursework while nestled into the Flat Tops Wilderness area of Colorado. Scattered across three days of hiking, camping and exploring were 15 hours of CME. The response, despite the physical challenges, was enthusiastic. One physician leader said, "I expected that it would be similar to other retreats, but this blew all my expectations out of the water. I learned true teamwork, and leadership skills to meet the present challenges, all in an experience of friendship amongst leaders."
April	Adventist Health System Physician Well- Being and Engagement Conference Ponte Vedra, FL	<i>Finding Meaning in Medicine</i> Burt Bertram, Ed.D. Michael Yurso, MD	Finding Meaning in Medicine is a conversation that invites physicians to speak from-the-heart physician-to-physician about personal experiences in their everyday life that provide access to the deeper meaning of the practice of medicine. Each meeting is organized around an announced topic. Presenters will conduct a live group.
April	Central Florida Association for Marriage & Family Therapy	<i>Counseling Males</i> Burt Bertram, Ed.D. Zach Gleason, MA	Participants were invited to think about counseling strategies appropriate working with males (boys to men). Strategies included the use of physical behaviors and intentional language that can help a counselor connect with and influence male clients. Participants were invited to consider how the generation of the counselor influences the manner in which counseling strategies are understood and applied. The focus of the presentation will include several examples of strategies involving the use of physical behaviors and the intentional language that can help a counselor connect with and influence a male client.
March	American Counseling Association	<i>The Counselor and the Law: Thirteen Tips to Avoid Legal/Ethical Issues in 2013</i>	Overview legal and ethical issues; Licensure board complaints, state and federal statutory mandates, and malpractice lawsuits. Use of Legal/Ethical Decision-

525 Sheridan Blvd • Orlando, FL

www.burtbertram.com

Tel: 407-426-8088 • Fax 407-426-0552 • Cell: 407-399-2344

Email: Burt@burtbertram.com

	Annual Conference Cincinnati, OH	Burt Bertram, Ed.D Nancy Wheeler, JD	Making Model and twelve risk prevention strategies including suggestions for handling difficult legal issues.
2012			
Dec	Central Florida Association for Marriage & Family Therapy Orlando, FL	<i>Ethics & Boundary Issues: Strategies for Reducing Risk of Lawsuits and Licensing Board Complaints</i> Burt Bertram, Ed.D.	Presentation provides overview of ethics and ethical decision-making model, explores the duties associated with the professional relationship including confidentiality, privilege, and privacy. Two case studies are presented that address threats of harm to self/others and professional boundaries.
June	American Counseling Association Online Webinar	<i>Dirty Dozen: Legal Traps to Avoid in Your Practice</i> Burt Bertram, Ed.D Nancy Wheeler, JD	Overview legal and ethical issues; Licensure board complaints, state and federal statutory mandates, and malpractice lawsuits. Use of Legal/Ethical Decision-Making Model and twelve risk prevention strategies including suggestions for handling difficult legal issues.
April	Adventist Health System Physician Well-Being and Engagement Conference Ponte Vedra, FL	<i>Finding Meaning in Medicine</i> Burt Bertram, Ed.D Michael Yurso, MD	Finding Meaning in Medicine is a conversation that invites physicians to speak from-the-heart physician-to-physician about personal experiences in their everyday life that provide access to the deeper meaning of the practice of medicine. Each meeting is organized around an announced topic. Presenters will conduct a live group.
March	American Counseling Association Annual Conference San Francisco	<i>Houston... We have a problem: How to Utilize a Legal/Ethical Decision Making Model</i> Burt Bertram, Ed.D Nancy Wheeler, JD <i>The Counselor and the Law: Avoiding the Dirty Dozen</i> Burt Bertram, Ed.D	Research in applied ethics informs us that when faced with a complex legal or ethical decision counselors can “unwittingly” act unethically. The ACA Code of Ethics has attempted to address this reality by mandating that counselors adopt an ethical decision-making model. This presentation provides participants with a legal/ethical model and two complex clinical situations in which to practice the use of the model. Participants will learn to more effectively recognize and address complex situations that involve 1) privacy, privilege, and confidentiality (including subpoenas); 2) social media; 3) threats of harm to self or others, and the ethical considerations of client referral. Overview legal and ethical issues; Licensure board complaints, state and federal statutory mandates, and malpractice lawsuits. Use of Legal/Ethical Decision-Making Model and twelve risk prevention

		Nancy Wheeler, JD	strategies including suggestions for handling difficult legal issues.
2011			
Oct	Associate for Counselor Educators and Supervisors Bi-Annual Conference Nashville	HIPAA Has New Teeth: Update on Confidentiality, Privilege and Privacy Burt Bertram, Ed.D Nancy Wheeler, JD	Bertram and Wheeler will introduce an updated legal/ethical decision-making model. Through use of case study, they will clarify the terms "confidentiality," "privilege," and "privacy." Presenters will provide guidelines for responding to a subpoena and discuss the new "breach notification" provisions of HITECH, which update HIPAA.
March	American Counseling Association Annual Conference New Orleans	HIPAA Has New Teeth: Update on Confidentiality, Privilege and Privacy Burt Bertram, Ed.D Nancy Wheeler, JD Top 11 in 2011: What Counselors Must Know NOW About Laws and Ethics Burt Bertram, Ed.D Nancy Wheeler, JD	Bertram and Wheeler will introduce an updated legal/ethical decision-making model. Through use of case study, they will clarify the terms "confidentiality," "privilege," and "privacy." Presenters will provide guidelines for responding to a subpoena and discuss the new "breach notification" provisions of HITECH, which update HIPAA. Bertram & Wheeler provided suggestions for handling 11 legal/ethical dilemmas, which often lead to licensure board complaints and lawsuits. Topics include: 1) confidentiality, privilege and privacy (highlighting subpoenas and HITECH, the successor to HIPAA); 2) social media; 3) boundary violations; 4) custody quagmires; 5) threats of harm to self or others; 6) consultation vs. supervision; 7) documentation; 8) employing an ethical decision-making model; 9) implications of institutional policy; 10) reporting duties; and 11) protection through adequate insurance.
2010			
Dec	Central Florida Association for Marriage & Family Therapy Orlando, Fl	Ethics & Boundary Issues: Strategies for Reducing Risk of Lawsuits and Licensing Board Complaints Burt Bertram, Ed.D.	Presentation provides overview of ethics and ethical decision-making model, explores the duties associated with the professional relationship including confidentiality, privilege, and privacy. Two case studies are presented that address threats of harm to self/others and professional boundaries.
Nov	Texas Counseling Association Austin, TX	Risky Business: Legal and Ethical Case Studies for Counselors in the Real World Burt Bertram, Ed.D Nancy Wheeler, JD	Presentation includes Legal/Ethical Decision-Making Model and two case studies to utilize the model. Case studies will address issues of confidentiality, privilege, privacy, and boundary violations. Additionally the presentation will include a description of how HIPAA has new "teeth" through the federal HITECH Rules. Finally,

525 Sheridan Blvd • Orlando, FL

www.burtbertram.com

Tel: 407-426-8088 • Fax 407-426-0552 • Cell: 407-399-2344

Email: Burt@burtbertram.com

			confidentiality and privacy concerns associated with Social Media and "cyber" activities will be explored. Presenters will be available after the presentation to respond to specific questions and concerns.
Oct	Southern Association for Counselor Education & Supervision Williamsburg, VA	HIPAA Has Grown New Teeth: Update for Counselor Educators on Confidentiality, Privilege & Privacy Burt Bertram, Ed.D Nancy Wheeler, JD	Presentation includes Ethical Decision-Making Model; Case Study to explore issues of confidentiality, privilege and privacy; HIPAA Update and how HIPAA has new "teeth" through the federal HITECH Rules; Social Media and "cyber" activities; and other related confidentiality and privacy concerns.
Sept	American Association for Marriage & Family Therapy Annual Conference Atlanta, GA	Professional Gatekeeping for Professional Competence: Legal & Ethical Issues Alicia Homrich, PhD Burt Bertram, Ed.D	Gatekeeping is an inherent and vexing responsibility of counselor educators and supervisors. Assessing and determining trainee-profession fit on dimensions of academic and clinical ability can be established by assessment instruments and qualitative standards. The construct of psychological fitness is less objective, less clearly defined, and often the area of greatest concern for counselor educators due to the subjective nature of psychological fitness. This program will provide an overview of the legal and ethical aspects of gatekeeping as it relates to dimensions of psychological fitness.
July	American Counseling Association Leadership Conference Alexandria, VA	Risky Business: Legal and Ethical Case Studies for Counselor Leaders Burt Bertram, Ed.D Nancy Wheeler, JD	Overview legal and ethical issues; Licensure board complaints, state and federal statutory mandates, and malpractice lawsuits. Six risk prevention strategies Suggestions to protect in the event of legal problems.
March	American Counseling Association Annual Conference Pittsburgh	Top Ten Steps to Reduce the Risk of Lawsuits and Licensure Board Complaints Burt Bertram, Ed.D Nancy Wheeler, J.D.	This presentation highlights the Top Ten risks of lawsuit and licensure board complaint that counselors and counselor leaders should know about. It includes new information about federal HITECH regulations which update HIPAA and also presents new concerns raised by counselor's use of social media.
March	American Counseling Association Annual Conference Pittsburgh	The Curse of the Custody Case Burt Bertram, Ed.D Nancy Wheeler, J.D.	Almost nothing seems to make otherwise stable and reasonable people suffer from "temporary insanity" like an adversarial divorce and child custody proceeding. Counselors are often involved either in a forensic capacity (conducting formal child custody evaluations) or in a clinical capacity (treating the family, one or more of the children, or one of the parents). In a highly charged emotional environment, the

			potential is high that the counselor may become drawn into the adversarial process and inadvertently engage in questionable professional behavior. Fear and frustration can often be the overriding emotion for one or both parents. In that environment, counselors can very quickly find themselves on the receiving end of ethical, regulatory, or legal complaints.
March	American Counseling Association Annual Conference Pittsburgh	<i>Ethics in Group Work: Must it be like herding cats?</i> Burt Bertram, Ed.D Derrick Paladino, PhD	This presentation will include an overview of the ethical issues that can/should be accounted for by the group leader. However, the primary emphasis of the presentation will be on identifying the difficult to control ethical challenges unique to group work related to group safety (e.g. confidentiality, privilege, privacy, subgroups, and difficulty group members). Strategies that encourage group members to adhere to unenforceable but critically important ethical safeguards that makes group work effective will be presented.
2009			
Oct	ACES Conference San Diego	Professional Gatekeeping: Legal and Ethical Dimensions of Psychological Fitness Alicia Homrich, PhD Burt Bertram, Ed.D	Gatekeeping is an inherent and vexing responsibility of counselor educators and supervisors. Assessing and determining trainee-profession fit on the dimensions of academic and clinical ability can be established by assessment instruments and qualitative standards. The construct of psychological fitness is less objective, less clearly defined, and often the area of greatest concern for counselor educators due to the subjective nature of psychological fitness. This program will provide an overview of the legal and ethical aspects of gatekeeping as it relates to dimensions of psychological fitness.
Oct	ACES Conference San Diego	Transformative Remediation: A Tale of Three Students Alicia Homrich, PhD Burt Bertram, Ed.D	Assessing the psychological fitness of students for the counseling profession, independent of academic or clinical abilities, is an ongoing concern of counselor educators and supervisors. Assisting counseling students in a developmental remediation process from a transformative stance includes providing an opportunity to demonstrate growth and change while maintaining ethical obligations as gatekeepers. Presenters will share the strategies used in their mental health counseling training program including a rationale and accompanying professional literature. Case examples of successful application of the process with three students, each resulting in a different outcome, will be presented.

Oct	ACES Conference San Diego	Risky Business: Legal and Ethical Case Studies for Your Classroom Burt Bertram, Ed.D Nancy Wheeler, JD	The real world of counseling practice can be risky. Two case studies based on a number of real life licensure board complaints and lawsuits will be discussed. Utilizing an ethical decision-making model, counselor educators will learn to more effectively field complex legal/ethical questions around areas of: 1) privacy, privilege, and confidentiality (including subpoenas); and 2) boundary violations. The case studies can be used when teaching ethics or providing clinical supervision.
July	American Counseling Association Leadership Conference Alexandria, VA	Risky Business: Legal and Ethical Case Studies for Counselor Leaders Burt Bertram, Ed.D Nancy Wheeler, JD	Overview legal and ethical issues; Licensure board complaints, state and federal statutory mandates, and malpractice lawsuits. Six risk prevention strategies Suggestions to protect in the event of legal problems.
March	American Counseling Association National Conference Charlotte, NC	The Counselor and the Law: Risk Management Strategies Burt Bertram, Ed.D Nancy Wheeler, JD	Ethics: Personal & Professional Ethical Violations – Board Complaints – Malpractice Lawsuits Confidentiality, Privilege, and Privacy Threats of Harm to Self/Others Professional Boundaries
2008			
June	Central Florida Association for Marriage & Family Therapy Orlando, FL	When the Counselor Needs Counsel: Strategies for Reducing Risk of Lawsuits and Licensure Board Complaints	Risk management strategies: 1. Develop and Utilize a Risk Management Tool Kit 2. Colleague Consultation 3. Develop and Utilize Appropriate Informed Consent 4. Respond Appropriately to a Subpoena 5. Respond to Threats of Harm to Self or Others 6. Manage Boundary Issues 7.
March	American Counseling Association National Conference Honolulu, HI	Lessons Learned by Virginia Tech: How to Prevent Harm and Safeguard Privacy and Freedom Nancy Wheeler, JD / Co-Presenter	Presentation addressed the multiple and complex issues involved in dealing with potentially violent clients, including: assessment of violence and balancing the client's legal rights of confidentiality, privilege, privacy, and personal freedom versus the duty to warn/protect (prevent harm to self or others).
		"Top Ten" Steps to Reduce the Risk of Lawsuits and Licensure Board Complaints Nancy Wheeler, JD / Co-Presenter	Designed to help counselors manage complex questions of privacy, privilege, and confidentiality (including subpoenas); duty to warn/protect; informed consent; multiple relationships; insurance; school and institutional policies; insurance;

			reporting duties and supervisory relationships; and included an overview of relevant case law and statutory law, as well as practical steps to take when faced with certain situations that may lead to a lawsuit or licensure board complaint.
		<p>Re-Norming a Group – The Intentional Transformation of an On-going Work Group</p> <p>Presentation made to Association for Specialists in Group Work (ASGW) Fellows on the occasion of becoming selected as an ASGW Fellow</p>	Presentation and facilitated discussion that explored the question: <i>Can longstanding group norms intentionally be changed in a permanent and on-going workplace group?</i> Two case studies involving efforts to re-norm a leadership group were presented.
2007			
Oct	ACES Conference Columbus, OH	<p>Risk Management for Supervisors Nancy Wheeler, JD Co-Presenter</p>	The program 1) outlined the legal basis of clinical supervision, 2) identified factors courts consider when determining liability and, 3) provided ten risk management activities.
		<p>Legal Implications for Dismissing Impaired Students Nancy Wheeler, JD Alicia Homrich, PhD Co-Presenters</p>	Students who are performing academically but who demonstrate troubling emotional, interpersonal, or character deficiencies present difficult moral, ethical and legal challenges. This presentation outlined legal steps and procedures that can help in the management of this problem.
March	ASGW Advanced Group Training Institute (ACA Pre-Conf) Detroit	<p>Leadership Skills for Counseling and Therapy Groups Ed Jacobs, Ed.D James Trotzer, PhD, Loan Phan, PhD Kurt Kraus, PhD Co-Presenters</p>	Five hour presentation – combined lecture, demonstration and micro-labs practice with process feedback from the training team. The institute concluded with a processing session directed toward integrating the skills and methods into participants group work practice.
2006			
Jan	ASGW Conference Mobile, AL	<p>Work Group Conflict Resolution: Intervention Model</p>	Interpersonal conflict in the workplace, between individuals and/or among team members is expensive; it depresses productivity, job satisfaction and quality of life. Based on case examples, a model for resolving conflict grounded in systemic-concepts and group process will be offered. Discussion will focus on application of the model (handouts provided).
Jan	Rollins College Winter Park, FL	<p>New Clinical Supervisor Training</p>	Strategies for building and maintaining a successful clinical supervision

		Judith Provost, Ed.D. Co-presenter	relationship for new supervisors
2005			
Oct	Rollins College Winter Park, FL	Clinical Supervision Skills for Intern Site Supervisors Judith Provost, Ed.D. Co-presenter	Explored parallel process as seen in issues/dynamics in the intern – client relationship and mirrored in the student – supervisor relationship
2004			
	(None)		
2003			
April	ACA Insurance Trust	Legal Aspects of Counseling Detroit, Michigan Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
April	ACA Insurance Trust	Legal Aspects of Counseling Grand Rapids, Michigan Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
2002			
Oct	ACES Conference Park City, Utah	Supervisory Liability	Explored the legal liabilities associated with clinical supervision – offered several risk management strategies
Nov	Rollins College Winter Park, FL	Supervisor Liability	Explored the legal liabilities associated with clinical supervision – offered several risk management strategies
2001			
March	ACA Pre- Conference San Antonio, TX	Legal Aspects of Counseling Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
April	ACA Insurance Trust	Legal Aspects of Counseling Montgomery, AL Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
April	ACA Insurance Trust	Legal Aspects of Counseling Birmingham, AL Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
April	ACA Insurance Trust	Legal Aspects of Counseling Grand Rapids, Michigan Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
Oct	ACA Midwest Region Branch Assembly	Risk Management for Professional Counselors	Highlight of the emerging trends in liability exposure for mental health professionals including Supervisory Liability, Coaching, Multi-disciplinary Practices, Internet/Technological Applications, and At-Risk Client Populations (including School Violence).
2000			
Jan	ASGW Conference	The Future Search Large Group Problem Solving &	Presented a review a community improvement effort, <i>The Seminole Vision</i> , based on the “future search” work of

		<i>Visioning Process</i> Deerfield Beach, FL	Marvin Weisbord. Use of breakout groups and other implications for working with a large number (100+) of participants was explored.
Oct	ACA Insurance Trust	<i>Legal Aspects of Counseling</i> Denver, CO Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
Oct	ACA Southern Region	<i>Legal Issues in Counseling</i>	Short overview presentation highlighting the most important risk management strategies for practicing counselors
1999			
Nov	ACA Insurance Trust	<i>Legal Aspects of Counseling</i> University of North Florida, Jacksonville, FL Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
Nov	ACA Insurance Trust	<i>Legal Aspects of Counseling</i> Rollins College, Winter Park, FL Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
Nov	ACA Insurance Trust	<i>Legal Aspects of Counseling</i> Florida Atlantic University Boca Raton, FL Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
Nov	ACA Insurance Trust	<i>Legal Aspects of Counseling</i> University of South Florida Tampa, FL Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
1998			
June	ACA Insurance Trust	<i>Legal Aspects of Counseling</i> Seattle, WA Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
1997			
Jan	ACA Insurance Trust	<i>Legal Aspects of Counseling</i> Columbia, SC Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
March	ACA Insurance Trust	<i>Legal Aspects of Counseling</i> Tallahassee, FL Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
March	ACA Insurance Trust	<i>Legal Aspects of Counseling</i> Tampa, FL Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
April	ACA Pre-Conference	<i>Legal Aspects of Counseling</i>	Full day seminar with co-presenter, attorney Nancy Wheeler on risk

		Orlando, FL Nancy Wheeler, JD Co-presenter	management issues inherent in the practice of counseling
May	ACA Video Conference	Ethical & Legal Issues	ACA first-ever nation-wide video featuring presenters on various aspects of ethical and legal practice
Oct	ACA Pre-Conference	Legal Aspects of Counseling Alexandria, VA Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
Sept	Emporia State University	Keynote – Emporia School Counselors Conference	Overview of the special legal issues faced by school counselors
Nov	ACA Pre-Conference	Legal Aspects of Counseling Tulsa, OK Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
1996			
Feb	ACA Insurance Trust	Legal Aspects of Counseling Denver, CO Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
Feb	ACA Insurance Trust	Legal Aspects of Counseling Kansas City, MO Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
March	ACA Insurance Trust	Legal Aspects of Counseling New Haven, CN Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
March	ACA Insurance Trust	Legal Aspects of Counseling Portland, ME Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
May	ACA Insurance Trust	Legal Aspects of Counseling Birmingham, AL Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
May	ACA Insurance Trust	Legal Aspects of Counseling Charleston, SC Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
May	ACA Insurance Trust	Legal Aspects of Counseling Richmond, VA Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
May	ACA Insurance Trust	Legal Aspects of Counseling Baltimore, MD Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
July	ACA Insurance Trust	Legal Aspects of Counseling Annapolis, MD Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling

525 Sheridan Blvd • Orlando, FL

www.burtbertram.com

Tel: 407-426-8088 • Fax 407-426-0552 • Cell: 407-399-2344

Email: Burt@burtbertram.com

Sept	ACA Insurance Trust	Legal Aspects of Counseling Albuquerque, NM Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
Sept	ACA Insurance Trust	Legal Aspects of Counseling Phoenix, AR Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
Nov	ACA Insurance Trust	Legal Aspects of Counseling New Orleans Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling
Nov	ACA Insurance Trust	Legal Aspects of Counseling Montgomery, AL Nancy Wheeler, JD Co-presenter	Full day seminar with co-presenter, attorney Nancy Wheeler on risk management issues inherent in the practice of counseling

Workshops & Seminars: Organization/Corporate (2007 – 1996)

Date	Company/Organization	Topic
2007		
December	Walt Disney World	Holiday Stress
September	Give Kids the World	Change, Transition, & Transformation
September	Walt Disney World	Stress Management
September	Walt Disney World	Working with Difficult People
September	Walt Disney World	Stress Management
October	Osceola Co. Fire/Rescue	Mentoring Seminar (½ day)
October	Adrenaline Films Company	Team Building (DiSC) - (½ day)
July	Walt Disney World	Working with Difficult People
July	Walt Disney World	Working with Difficult People
July	Walt Disney World	Working with Difficult People
June	Walt Disney World	Time Management
June	Walt Disney World	Working with Difficult People
June	Florida Bankers Association	Interpersonal Communication
June	Florida Bankers Association	Management Challenges
March	Walt Disney World	Resolving Workplace Conflict
March	Walt Disney World	Balancing Work & Family Life
2006		
September	Walt Disney World	Grief & Loss
July	Osceola Co. Fire/Rescue	Mentoring Seminar (½ day)
July	Walt Disney World	Working with Difficult People
July	Walt Disney World	Stress Management
June	Osceola Co. Fire/Rescue	Mentoring Seminar (½ day)
June	Walt Disney World	Balancing Work & Family Life
June	Florida Bankers Association	Interpersonal Communication
June	Florida Bankers Association	Management Challenges
May	Walt Disney World	Stress Management
May	Walt Disney World	Keys to Healthy Relationship
April	Osceola Co. Fire/Rescue	Mentoring Seminar (½ day)
March	Walt Disney World	Put Your Mind in Charge of Your Brain
March	Walt Disney World	Life Transition
February	Osceola Co. Fire/Rescue	Mentoring Seminar (½ day)
2005		
December	Orange County Public Schools	Peer Communication: How to Make a Solid Connection
November	Osceola Fire/Rescue Dept	Mentoring Skills for Managers
October	EA Sport	Balancing Work & Family Life
October	Walt Disney World	Life Transitions
October	Walt Disney World	Balancing Work & Family Life
October	Walt Disney World	Stress Management
August	Walt Disney World	Growing Healthy Families
August	Walt Disney World	Balancing Work & Family Life
July	Walt Disney World	Working with Difficult People
July	Walt Disney World	Getting Along & Working with People

June	Walt Disney World	Getting Along & Resolving Conflict
June	Walt Disney World	Balancing Work & Family Life
June	Florida Bankers Association	Interpersonal Communication
June	Florida Bankers Association	Management Challenges
May	Walt Disney World	Communicating Effectively with Customers
April	Walt Disney World	Getting Along & Resolving Conflict
April	Walt Disney World	Change Management
April	Walt Disney World	Getting Along & Resolving Conflict
2004		
February	City of Casselberry, FL	Conflict Resolution Seminar (½ day) (Confidential individual coaching for all members provided in the week following the seminar)
February	Sears Home Improvement Co.	Myers-Briggs Training for Supervisors
March	Central Florida Fire Chiefs Association	The Chief and Conflict: Resolutions strategies other than power
May	Young President's Organization	Affluenza: The challenges of raising children in a privileged family
June	Florida Bankers Association	Interpersonal Communication
June	Florida Bankers Association	Management Challenges
2003		
January	Osceola County Corrections	Myers-Briggs Training for Senior Managers
January	Osceola County Corrections	Myers-Briggs Training for 1 st Line Supervisors
March	Nodarse Engineering	Company Retreat – DISC Training
June	Florida Bankers Association	Interpersonal Communication
June	Florida Bankers Association	Management Challenges
November	Sears Home Improvement Co.	Myers-Briggs Training for Senior Managers
November	Philanthropy Center at Rollins College	Understanding Yourself and Others (DiSC profile)
2002		
2001		
February	Orange County Public Schools	Listening Skills for Teachers
March	Transportation Planning Agency (Orlando)	Conflict Management
July	Florida Bankers Association	Interpersonal Communication
July	Florida Bankers Association	Management Challenges
October	Community College	Communication Training (DISC)
2000		
April	Managers – Professional Association	Handing Change Lifestyle Balancing
May	Community College	Rising Expectations & Limited Resources
November	Transportation Planning Agency (Orlando)	Interpersonal Communication
December	Managers – Professional Association	Lifestyle Balancing
1999		
February	Bank (Orlando)	Customer Relationship Skills

March ---- April	Walt Disney World Company	Lead from Within (3 day intense training program for managers) This program was developed for the Disney Company based on the unique demands and challenges within the Disney culture. It was taught to seven different groups (15 per class). (Total Training Hours: 18 hours per class X 7 class = 126 hours)
July	Florida Bankers Association	Interpersonal Communication
1998		
February	Chamber of Commerce	Staff Development - Communication
August	Florida Bankers Association	Lifestyle Balancing
1997		
February	Hospital (Management Staff)	Conflict Management
1996		
March	American Express Life Ins.	Lifestyle Balancing
May	Disney Institute	Mid-Life & Beyond
May	Disney Institute	Relationships
June	Disney Institute	Relationships
July	Disney Institute	Relationships
August	Disney Institute	Mid-Life & Beyond

Professional Development Training (2013 – 1994)

Year/Month	Sponsoring Institution	Course/Seminar Title	CEU
2013			
December	Psychotherapy Networker	Who's Afraid of Couples Therapy	6.0
November	Rollins College	DSM-5 Changes and the Clinical Curriculum	3.0
April	CFAMFT	Counseling Males	1.0
March	ACA	ACA Annual Professional Conference	7.0
February	CFAMFT	Intimacy & Desire	1.0
February	Ce4less.com	Domestic Violence	3.0
February	Ce4less.com	Medical Error Prevention for Mental Health	3.0
2012			
October	CFAMFT	Professional Boundaries & Ethics	3.0
July	Psychotherapy Networker	Men in Therapy	6.0
February	Rollins College	Integrating Spiritual Issues & Multicultural Counseling	
2011			
March	AffectPlus	Medical Error Prevention for Mental Health	2.0
2010			
October	AAMFT	Annual AAMFT Professional Conference	13.5
October	Michael Freeney	Interdisciplinary Family Collaboration Practice Training	14.0
2009			
November	Institute for Brain Potential	Memory, Presented by David Diamond, PhD	6.0
March	American Counseling Association	ACA – National Conference: Charlotte, NC	5.5
March	Affect A Plus	Medical Errors Prevention	2.0
February	Rollins College	Dialectical Behavior Therapy	6.0
2008			
April	American Counseling Association	ACA – National Conference: Honolulu, HI	6.5
February	ASGW	ASGW National Conference <ul style="list-style-type: none"> ○ Opening: Native Am Groups / ASGW Genogram ○ Mindful Counselor Education in Group Settings ○ Types of Multicultural Group Work ○ Strengths-based Group Counseling Approach with Older Persons in Nursing Homes ○ Learning How to Select Group Techniques ○ Using Group Dynamics to Promote Inclusively in Counselor Training Courses 	8.5
January	Cross Country	Overindulged Children and Conduct Disorder:	6.0

525 Sheridan Blvd • Orlando, FL

www.burtbertram.com

Tel: 407-426-8088 • Fax 407-426-0552 • Cell: 407-399-2344

Email: Burt@burtbertram.com

	Education	Treating Overindulgent Families	
2007			
October	ACES / ACA	Association for Counselor Educators & Supervisors <ul style="list-style-type: none"> ○ Risk Management for Supervisors ○ Keynote: Passion of the Counselor ○ Legal Implications of Dismissing Impaired Students ○ Best Practice Guidelines: Diversity in Groupwork ○ The Student Who Changed Me ○ The Heart of Change ○ Themes & Trends in Counseling 	7.0
March	American Counseling Association	ACA – National Conference: Detroit	6.0
March	CF Mental Health Counselors Assoc	The Right Use of Power: Ethics for Helping Professions	4.0
February	Affect-APlus	Preventing Medical Errors	2.0
2006			
January	ASGW / ACA	ASGW National Conference <ul style="list-style-type: none"> ○ Keynote Session ○ Group Work Conflict Resolution ○ Kids Connect ○ Roundtable: Men Who Batter ○ Existent Groups in Organizations 	6.5
January	Rollins College	Counseling Adult Survivors of Trauma, Satsuki Ina, PhD	7.0
February	Rollins College	Counseling Depressed Boys & Men, Mark Kiselica, PhD	7.0
July	NBCC	The Power of Dialogue: Public Conversations Project	22.5
2005			
April	ACA	ACA Annual Convention	6.5
October	Rollins College	Supervising from a Solution Focused Perspective	3.0
November	Cross Country University	Counseling Couples: What Works, What Doesn't Work	6.0
2004			
January	ASGW / ACA	ASGW National Conference	6.0
March	Prof Develop't Resources	Preventing Medical Errors	2.0
March	Prof Develop't Resources	Domestic Violence I – Child Abuse	1.0
October	Rollins College	Impact of the System on the Supervision Process: Parallel Process Revisited	3.0
2003			
None			
2002			
January	ASGW	ASGW National Conference <ul style="list-style-type: none"> ○ Training Community Leaders in Crisis Response ○ Combining Experiential and Didactic ○ Utilizing Personality Theories in Group Work ○ Groups for Liberation 	6.0
September	AAMFT: Central Florida	Assessing for Domestic Violence	1.0
November	Larry E. Shyers, PhD	Protecting Against Medical Errors for the Mental Health Professional	2.0
2001			

February	Cortex Mind Matters	Listening to the Body	6.0
March	ACA	ACA National Conference	7.5
March	ACA	Legal Aspects of Counseling	6.0
June	Diane Sollee, CMFCE	Smart Marriages – Happy Families Conference	17.5
October	Rollins College	Counseling Supervision & Legal Risk Management	3.0
2000			
April	Associates in Counseling & Education, Inc	Internet Applications for Clinicians	6.0
1999			
May	Florida AAMFT	Family Systems and Organizations	2.0
June	Valencia CC	Qualified Supervisor Training	16.0
1998			
November	Florida – ACA	FCA State Conference	7.5
		Legal & Ethical Issues of Counseling	
		Tales of Differentiation Using Stories	
		How to Best Supervise an MHC	
November		Domestic Violence	3.0
1997			
April	ACA	ACA National Conference	15.5
1996			
February	Central Florida AAMFT	Constructing Sexual Crucible – David Schnarch, PhD	13.0
March	FCA	Brief Counseling – Strategies & Techniques	6.0
1995			
October	Valencia CC	Domestic Violence for Healthcare Professionals	2.0
November	FCA	FCA Conference	6.0
1994			
January	Florida Supreme Court	Family Mediation Training Program	40.0
November	Impact Seminars, Inc.	Courtroom Survival Techniques: Power and Control of the Witness Stand	6.0
November	Charles English	Changing Racism	15.0

Graduate Teaching: Counselor Education Courses (2013 – 1994)

Academic Year	Institution	Course
2013-14	Rollins College	
Fall	Adjunct Faculty	CPY 557 Couples & Marriage Therapy
2012-13	Rollins College	
Fall	Adjunct Faculty	CPY 557 Couples & Marriage Therapy
Summer	Adjunct Faculty	CPY 560 Community Counseling & Crisis Intervention
Summer	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
2011-12	Rollins College	
Fall	Visiting Faculty	CPY 550 Dynamics of Marriage, Relationship & Family System
Fall	Visiting Faculty	CPY 550 Family & Relationship Counseling
Fall	Visiting Faculty	PSY 695 Internship in Mental Health Counseling
Spring	Visiting Faculty	PSY 695 Internship in Mental Health Counseling
Spring	Visiting Faculty	CPY 525 Counseling Theories and Practice
Spring	Visiting Faculty	CPY 557 Couples & Marriage Therapy
Summer	Adjunct Faculty	CPY 560 Community Counseling & Crisis Intervention
Summer	Adjunct Faculty	CPY 560 Community Counseling & Crisis Intervention
2010-11	Rollins College	
Fall	Adjunct Faculty	CPY 555 Family & Relationship Counseling
Fall	Adjunct Faculty	PSY 680 Practicum in Mental Health Counseling
2009-10	Rollins College	
Fall	Adjunct Faculty	CPY 555 Family & Relationship Counseling
Spring	Visiting Faculty	CPY 557 Couples & Marriage Therapy: Theory & Techniques
Spring	Visiting Faculty	CPY 525 Counseling Theories and Practice
Spring	Visiting Faculty	CPY 555 Family Therapy: Skills & Techniques
Summer	Adjunct Faculty	CPY 560 Community Counseling & Crisis Intervention
Summer	Adjunct Faculty	CPY 560 Community Counseling & Crisis Intervention
2008-09	Rollins College	
Fall	Adjunct Faculty	PSY 695 Internship in Mental Health Counseling
Spring	Adjunct Faculty	PSY 695 Internship in Mental Health Counseling
Spring	Adjunct Faculty	CPY 557 Couples & Marriage Therapy: Theory & Techniques
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community
Summer	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
2007-08	Rollins College	
Fall	Adjunct Faculty	CPY 555 Family & Relationship Counseling
Spring	Adjunct Faculty	PSY 680 Practicum in Mental Health Counseling
Spring	Adjunct Faculty	CPY 557 Couples & Marriage Therapy: Theory & Techniques
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community (01)
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community (02)
2006-07	Rollins College	
Spring	Adjunct Faculty	CPY 557 Couples & Marriage Therapy: Theory & Techniques
Summer	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community
2005-06	Rollins College	
Fall	Visiting Faculty	PSY 695 Internship in Mental Health Counseling
Fall	Visiting Faculty	PSY 680 Practicum in Mental Health Counseling

Fall	Visiting Faculty	CPY 555 Family & Relationship Counseling
Spring	Visiting Faculty	PSY 695 Internship in Mental Health Counseling
Spring	Visiting Faculty	PSY 680 Practicum in Mental Health Counseling
Spring	Visiting Faculty	CPY 557 Couples & Marriage Therapy: Theory & Techniques
Summer	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community (01)
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community (02)
2004-05	Rollins College	
Fall	Visiting Faculty	PSY 695 Internship in Mental Health Counseling
Fall	Visiting Faculty	PSY 680 Practicum in Mental Health Counseling
Fall	Visiting Faculty	CPY 555 Family & Relationship Counseling
Spring	Visiting Faculty	PSY 680 Practicum in Mental Health Counseling
Spring	Visiting Faculty	CPY 557 Couples & Marriage Therapy: Theory & Techniques
Spring	Visiting Faculty	CPY 525 Counseling Theories & Practice
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community (01)
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community (02)
2003-04	Rollins College	
Fall	Visiting Faculty	PSY 695 Internship in Mental Health Counseling
Fall	Visiting Faculty	PSY 680 Practicum in Mental Health Counseling
Fall	Visiting Faculty	CPY 555 Family & Relationship Counseling
Spring	Adjunct Faculty	PSY 680 Practicum in Mental Health Counseling
Spring	Adjunct Faculty	CPY 525 Counseling Theories & Practice
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community
Summer	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
2002-03	Rollins College	
Fall	Adjunct Faculty	PSY 695 Internship in Mental Health Counseling
Spring	Visiting Faculty	PSY 695 Internship in Mental Health Counseling
Spring	Visiting Faculty	PSY 680 Practicum in Mental Health Counseling
Spring	Visiting Faculty	CPY 525 Counseling Theories & Practice
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community
Summer	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
2001-02	Rollins College	
Fall	Visiting Faculty	CPY 520 Group Dynamics and Process
Fall	Visiting Faculty	PSY 680 Practicum in Mental Health Counseling
Fall	Visiting Faculty	PSY 695 Internship in Mental Health Counseling
Spring	Adjunct Faculty	CPY 525 Counseling Theories & Practice
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community
Summer	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
2000-01	Rollins College	
Fall	Adjunct Faculty	CPY 525 Counseling Theories & Practice
Spring	Adjunct Faculty	PSY 680 Practicum in Mental Health Counseling
Spring	Adjunct Faculty	CPY 525 Counseling Theories & Practice
Summer	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community
1999-00	Rollins College	
Fall	Adjunct Faculty	CPY 520 Group Dynamics and Process
Spring	Adjunct Faculty	PSY 680 Practicum in Mental Health Counseling
Spring	Adjunct Faculty	CPY 525 Counseling Theories & Practice
Summer	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling

Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community
1998-99	Rollins College	
Fall	Adjunct Faculty	PSY 695 Internship in Mental Health Counseling
Spring	Adjunct Faculty	PSY 680 Practicum in Mental Health Counseling
Spring	Adjunct Faculty	CPY 525 Counseling Theories & Practice
Summer	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community
1997-98	Rollins College	
Fall	Adjunct Faculty	CPY 520 Group Dynamics and Process
Winter	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
Spring	Adjunct Faculty	CPY 525 Counseling Theories & Practice
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community
1996-97	Rollins College	
Fall	Adjunct Faculty	CPY 520 Group Dynamics and Process
Winter	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
Spring	Adjunct Faculty	CPY 525 Counseling Theories & Practice
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community
1995-96	Rollins College	
Fall	Adjunct Faculty	CPY 520 Group Dynamics and Process
Winter	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
Spring	Adjunct Faculty	CPY 520 Group Dynamics and Process
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community
1994-95	Rollins College	
Winter	Adjunct Faculty	CPY 545 Legal, Professional, & Ethical Issues in Counseling
Spring	Adjunct Faculty	CPY 520 Group Dynamics and Process
Summer	Adjunct Faculty	CPY 560 Counseling & Consultation in the Community

Group Process Facilitation Projects (2007 – 1996)

Date	Client	Project Activity	Description
2007			
April-Dec	Surety Bond Co	<p>Create Leadership Team</p> <p>Desired Outcome – help five individual contributors redefine themselves into a functional leadership team</p>	The owner/founder of a privately held company was ready to retire – and wanted to transfer leadership of the company to a small group of existing company managers. The challenge was they didn't trust each other and didn't know how to work as a leadership team. Through a combination of consultation, training, conflict resolution, and individual coaching – these five individual contributors became a functional leadership group.
May	County Fire/Rescue and Emergency Services Department (Florida)	<p>Conflict Resolution</p> <p>Desired Outcome – resolve conflict / develop trust between two key staff members</p>	Through a series of individual and dyad conflict resolution discussion – historical issues of distrust and misunderstanding were identified. New interactive behaviors were identified – toward the creation of an improved working relationship
February	Private Power Utility	<p>Leadership Team Dialogue</p> <p>Desired Outcome – improved trust and communication between/among the seniors leaders of the human resources department</p>	<p>Full day of facilitated dialogue focused around the following:</p> <ul style="list-style-type: none"> ○ What is it we need to do different as a leadership team? ○ How can we improve awareness/understanding of the intra-group process that govern the productivity and interaction of the leadership team ○ Creation of an improvement plan that is measurable, defines accountabilities, and establishes timeframes
January	Professional Association	<p>Planning & Goals Setting</p> <p>Desired Outcome – identify goals for coming year – ensure there is consensus and support toward to realization of the goals</p>	<ul style="list-style-type: none"> ○ Pre-meeting survey to identify issues, concerns, and suggested goals ○ Full day facilitated meeting in which all issues were discussed, potential goals identified, goals prioritized, finalized short list of actionable goals agreed up, and strategies for implementing goals

2006			
November	County Fire/Rescue and Emergency Services Department (Florida)	<p>Leadership Conversations for Senior Leaders</p> <p>Desired Outcome - strengthen group cohesion within a 18 person senior leadership team</p>	<p><u>Data Gathering</u> – confidential individual interviews with all 18 members of the team – from which important group process themes and issues were identified.</p> <p><u>Group Process</u> – during a full day retreat, the themes and issues were presented (sanitized of identity) – dialogue among all members was facilitated allowing for the team to honestly address a team dysfunction, work through the discomfort, and determine a plan for change.</p>
June	Community Theater (Sanford, FL)	<p>Board Retreat and Strategic Plan Development</p> <p>Desired Outcome - develop a five-year strategic plan</p>	<p><u>Designed</u> – process to ensure desired outcome (glean feedback on 5 year priorities including Goals, Strategies, Timelines and Accountability Measures)</p> <p><u>Group Process</u> – facilitated dialogue and process to deliver desired outcome</p> <p><u>Strategic Plan</u> –develop DRAFT plan – circulate for comment – finalize plan</p>
2005			
Apr-May	County Jail – Classifications Department (Florida)	<p>Conflict Resolution Team Building</p> <p>Desired Outcome - resolve interpersonal conflict within a 6 person department</p>	<p><u>Assessment</u> - Confidential Interviews</p> <p><u>Group Process</u> – Facilitated a team ventilation session</p> <p><u>Coaching</u> – follow-up and supportive coaching for department manager</p>
Feb-Mar	County Fire/Rescue and Emergency Services Department (Florida)	<p>Organization Culture</p> <p>Desired Outcome - assess current culture, consider the implications of culture on productivity, and develop recommendations for re-shaping the culture</p>	<p><u>Data Gathering</u> - designed and implemented organization culture assessment process utilizing staff wide online survey, focus groups, and individual interviews</p> <p><u>Culture Report</u> – data presented to senior managers and middle mgrs</p> <p><u>Group Process</u> – facilitated dialogue toward identifying implications and recommendations for intentional culture change</p>
May-Dec	County Jail Watch Commanders (Florida)	<p>Middle Managers Supervision Group</p> <p>Desired Outcome - provide middle managers with safe</p>	<p><u>Group Process</u> – facilitated six monthly meetings (90 minutes) in which middle managers (Watch Commanders) had opportunity to explore supervision issues.</p>

		environment to discuss management challenges	(Functioned in many ways like a counseling supervision group)
August	Medical Supply Company Winter Park, FL	Conflict Resolution Desired Outcome - assist small successful business to identify and address staff tensions and conflict that were threatening continued success	<u>Assessment</u> - confidential Interviews <u>Group Process</u> – facilitated conflict resolution discussions at full day retreat <u>Mediated Conflict</u> – private discussion between two members <u>Coaching</u> : Follow-up support for owners
2004			
January	The Seminole Vision, Inc. Envision Seminole (Florida)	3rd Vision Conference Desired Outcome - provide senior community leaders from business, government, public safety, education and human services with opportunity to share perspectives and ideas toward improving the community.	<u>Design</u> - worked with a steering committee to design a retreat process to identify community improvement opportunities, prioritize the opportunities, and define a plan of action for community improvement initiatives <u>Group Process</u> : facilitated a day long retreat for 85 community leaders <u>Report</u> : developed summary report outlining priorities and community improvement action items <u>Utilized</u> : Future Search Strategies
January	Engineering Co. Winter Park, FL	Leadership Dialogue for Senior Leaders Desired Outcome - invite senior company leaders to give voice to group dynamics within the leadership team that were inhibiting effective communication and decision-making	<u>Data Gathering</u> – confidential individual interviews with all 8 members of the team – from which team strengths and weaknesses were identified. <u>Group Process</u> – during a full day retreat, the themes and issues were presented (sanitized of identity) – dialogue among all members was facilitated allowing for the team to honestly address team strengths and weaknesses; a plan for strengthening the team was developed.
February	Land Use & Planning Co. Orlando, FL	Company Retreat – Communication & Trust Building Desired Outcome - invite all members of the company (14) to safely identify and address work process and inter-personal dynamics that affect productivity	<u>Data Gathering</u> – confidential individual interviews of 8 members combined with confidential survey – from which team strengths and weaknesses were identified. <u>Group Process</u> – during a full day retreat, the themes and issues were presented (sanitized of identity) – dialogue among all members was facilitated allowing for the team to honestly address

			team strengths and weaknesses; a plan for strengthening the team was developed.
May	Water/Sewage Treatment Facility (Florida)	<p>Conflict Resolution</p> <p>Desired Outcome - intervene to address 3 years of chronic interpersonal conflict that was severely affecting productivity and employee health.</p>	<p><u>Data Gathering</u> – confidential individual interviews of 7 of 12 members as well as in-depth discussion with department manager and public works director – conflict inviting interpersonal and systemic dynamics were identified.</p> <p><u>Group Process</u> – during a half-day department meeting the conflict was openly addressed. As a result there was a shift in group norms that had formerly given support for the chronic conflict. Members pledged to discontinue triangular communication and committed to cease behaviors that fueled the conflict.</p>
2003			
Jan – Dec	The Seminole Vision, Inc. (Florida)	<p>Mayors & Managers Dialogue</p> <p>Desired Outcome - facilitate dialogue between/among seven city mayors, seven city managers, the county manager, and the chair of county commission – toward ensuring open communication as they seek innovative ways to collaborate and/or reduce inevitable competition and conflict.</p>	<p><u>Group Process</u> – facilitate open and direct communication between and among sixteen elected officials as they attempt to find common ground and balance constituent needs with the needs of the larger community and region.</p> <p>Group met as needed throughout 2003 (3 Meetings)</p>
May	College Athletic Conference	<p>University CEO - AD Communication</p> <p>Desired Outcome - increase the awareness and appreciation each President and each Athletic Director has for the complexities, pressures and challenges of the companion role and then facilitate dialogue between and among the participants.</p>	<p><u>Data Gathering</u> – on-line confidential survey combined with individual interviews of most of the Presidents and Athletic Directors from the member schools identifying role conflicts (Pres to AD) as well as conference goals – from that data issues and themes were identified.</p> <p><u>Group Process</u> – during a half-day meeting – facilitated dialogue among the members toward the goal of each gaining a better appreciation for the challenges and stressors of the roles involved – and how each could make it somewhat easier on their counter-part.</p>
May	College Athletic	Vision 2010	<u>Data Gathering</u> – on-line

	Conference	Desired Outcome – identify realistic global vision for the organization and the identify realistic steps (goals/strategies) toward that vision – accomplish in an atmosphere designed to establish shared ownership for the direction of the conference.	confidential survey combined with individual interviews of most of the Presidents and Athletic Directors from the member schools identifying role conflicts (Pres to AD) as well as conference goals – from that data issues and themes were identified. <u>Group Process</u> – during a half-day meeting – facilitated dialogue and consensus among 10 CEOs and 10 AD (and various supportive personnel) toward identifying a vision statement and developing realistic goals/strategies for the conference.
March	County Jail – Probation Dept (Florida)	Conflict Resolution Team Building Desired Outcome - resolve chronic conflict and distrust between probation officers and managers in the department.)	<u>Data Gathering</u> – confidential individual interviews with all 15 members of the department – from which important trust and communication group process themes and issues were identified. <u>Group Process</u> – during a series of half-day team building meetings, the themes and issues were discussed – dialogue among all members was facilitated allowing for the team to honestly address a team dysfunction, work through the discomfort, and determine a plan for change. <u>Coaching</u> – follow-up and supportive coaching for department manager and assistant manager
August September	Private University (Florida)	Conflict Resolution with Senior Leadership Team Desired Outcome - identify the underlying and ultimately bring to resolution the issues that were fueling chronic conflict within the senior leadership team of a private university)	<u>Data Gathering</u> – confidential individual interviews with the 5 members of the leadership team – from which important trust, communication, and group process themes and issues were identified. <u>Group Process</u> – during a series of three full-day team building meetings, the themes and issues were discussed – dialogue among all members was facilitated allowing for the team to honestly address a issues of distrust and dysfunction - and determine a plan for change. <u>Coaching</u> – follow-up and

			supportive coaching for the university president and vice president.
December	Home Improvement Company (Orlando, FL)	Leadership Conversations and Feedback Desired Outcome - facilitate honest communication at a senior leader retreat – while each of the five members of gave/received honest feedback about work performance	<u>Group Process</u> – during a full-day leadership team building meeting – members provided feedback to each other regarding the following three areas: <ul style="list-style-type: none"> • Keep doing... • Stop doing... • Consider doing...
2002			
Jan – Dec	The Seminole Vision, Inc. (Florida)	Mayors & Managers Dialogue Desired Outcome - facilitate dialogue between/among seven city mayors, seven city managers, the county manager, and the chair of county commission – toward ensuring open communication as they seek innovative ways to collaborate and/or reduce inevitable competition and conflict.	<u>Group Process</u> – facilitate open and direct communication between and among sixteen elected officials as they attempt to find common ground and balance constituent needs with the needs of the larger community and region. Group met as needed throughout 2002 (4 Times)
February	Land Use Planning Firm (Private)	Team Building and Morale Improvement Desired Outcome – reduced tension and improved productivity	<u>Assessment</u> – confidential interviews focus on identifying the unique contribution of each member <u>Group Process</u> - ½ day meeting (12 mbrs) – provided everyone opportunity to air concerns and better understand each member's role/contribution
June	Engineering Company (Gainesville, FL)	Conflict Resolution & Staff Development Desired Outcome – facilitate a process that will resolve long standing conflict within the accounting department	<u>Data Gathering</u> – facilitated a meeting to understand the dynamics within the department – process involved interviews with manager as well as group discussion <u>Group Process</u> – facilitate a series of “resolution” meetings designed to stabilize the department
2001			
Jan – Dec	The Seminole Vision, Inc. (Florida)	Mayors & Managers Dialogue Desired Outcome - facilitate dialogue between/among seven city mayors, seven city managers, the county manager, and the chair of county commission – toward ensuring open communication as they	<u>Group Process</u> – facilitate open and direct communication between and among sixteen elected officials as they attempt to find common ground and balance constituent needs with the needs of the larger community and region.

		seek innovative ways to collaborate and/or reduce inevitable competition and conflict.	Group met as needed throughout 2001 (6 Meetings)
August	Community Commission on Aging (Florida)	Initial Board Retreat Desired Outcome – the board was just appointment, this full day retreat was designed to create group cohesion and begin identifying goals and processes	<u>Group Process</u> – facilitate the initial board meeting in a way that gives ownership of the process to the participants such that they can establish a productive and positive working environment
October	Community Action Summit (Florida)	Law Enforcement, Mental Health & Substance Abuse Summit Desired Outcome – bring together leaders from law enforcement, mental health, and substance abuse – explore ways to enhance collaboration when serving citizens with multiple needs	Group Process – utilizing large and small group strategies, participants identified common ground as well as points of conflict around serving the needs of residents who have multiple needs
November	Community Human Service Agency (Winter Park, FL)	Staff Development and Team Building Desired Outcome – provide opportunity for staff to voice concerns and to understand the role/responsibility of members of this multi-disciplinary agency	Group Process – facilitate open and direct communication between and among twenty-five staff members – encourage informal connections and bridge building toward improving morale, cohesion, and productivity.
December	The Seminole Vision, Inc.	Terrorism Conference for Community Leaders Desired Outcome – provide opportunity for public safety officials to communicate to community leaders the status of readiness to respond to terrorism	Group Process – through a half-day facilitated meeting, senior public safety officials communicated the readiness of the community to respond to terrorism – the meeting was videotaped and played many times on local government television
December	Physician Group (Orlando, FL)	Conflict Resolution & Staff Development Project Outcome - intervene to identify and address a level of interpersonal conflict that threatens to drive away valuable staff members – and return the organization to its previous high level of patient care, financial profitability, and employee satisfaction	<u>Data Gathering</u> – confidential individual interviews of 8 of 16 staff members as well as in-depth discussion with practice manager, and five physician partners; and confidential survey completed by everyone. Interpersonal and systemic issues and themes are identified. <u>Group Process</u> – through a series of facilitated meetings (partners, partners and practice administrator, administrator and department managers, and everyone – issues were identified

			and discussed – resolution strategies determined. <u>Coaching</u> – for practice administrator and senior physician
2000			
Jan – Dec	The Seminole Vision, Inc. (Florida)	Mayors & Managers Dialogue Desired Outcome - facilitate dialogue between/among seven city mayors, seven city managers, the county manager, and the chair of county commission – toward ensuring open communication as they seek innovative ways to collaborate and/or reduce inevitable competition and conflict.	<u>Group Process</u> – facilitate open and direct communication between and among sixteen elected officials as they attempt to find common ground and balance constituent needs with the needs of the larger community and region. Group met as needed throughout 2000 (6 Meetings)
March	Orlando Area Chamber of Commerce & MetroPlan Orlando	Shaping the Community Vision Desired Outcome – the chamber had sponsored a series of visioning meetings – this one was designed to provide maximum participant involvement – utilizing wireless electronic voting equipment	<u>Preparation & Design</u> – conference process utilized wireless electronic voting technology that allowed participants to respond to a series of questions and in real time, immediately see the results. Design included facilitating five pre-conference meetings with different stakeholder groups to determine the right mix of questions to be asked during the conference. <u>Group Process</u> – full day exploration of attitudes and priorities of 175 community leaders – attendees utilized wireless electronic voting technology to respond to a series of 24 questions, immediately see the results, discuss the implications, and offer suggested actions. <u>Final Summary Report</u> – captured the raw data outcomes, implications and suggested actions
May - Dec	Film & Video Production Company (Orlando, Florida)	Staff Dialogue, Team Building and Culture Change Desired Outcome - assist the owner and staff as this successful organization moved from a small business (informal culture) to a larger business	<u>Group Process</u> – facilitated several meetings and retreats to toward inviting open and direct communication, tension reduction, and reconfigured group cohesion among a growing staff of 15 highly creative and independent film professionals. <u>Coaching</u> – provided on-going

		(somewhat more formal culture). The changes in the culture were welcomed by some members and resisted by others – particularly some veteran members. <ul style="list-style-type: none"> • Team Building • Culture Creation • Conflict Resolution 	support for the owner of the company as he shifted his expectations of himself and his staff and developed new management structures to respond to the challenges and opportunities of a growing business
July	Professional Association (Financial Industry) (Florida)	Board Planning Retreat Desired Outcome - ensure the Board would make productive use of limited time to produce annual goals	Group Process – facilitated a full day board meeting – review goal accomplishments established goals for the coming year
September	Statewide Community Leadership Board (Florida)	Annual Board Planning Retreat Desired Outcome - ensure the Board would make productive use of limited time to produce annual goals	Group Process – facilitated a full day board meeting – review goal accomplishments established goals for the coming year
December	Seminole Youth Commission (Florida)	Community Needs Conference Desired Outcome – involve youth professionals and youth leaders in identifying needs of youth in the community and determining how community leaders can respond to these needs	Group Process – designed and facilitated a half-day conference with over 85 participants – utilized breakout groups to identify community youth related needs, then as a large group to prioritize the needs, and determine strategies for addressing the needs.
1999			
Jan – Dec	The Seminole Vision, Inc. (Florida)	Mayors & Managers Dialogue Desired Outcome - facilitate dialogue between/among seven city mayors, seven city managers, the county manager, and the chair of county commission – toward ensuring open communication as they seek innovative ways to collaborate and/or reduce inevitable competition and conflict.	Group Process – facilitate open and direct communication between and among sixteen elected officials as they attempt to find common ground and balance constituent needs with the needs of the larger community and region. Group met as needed throughout 1999 (6 Meetings)
April	Church	Congregation in Conflict Desired Outcome – church congregation was on the verge of splitting – the desire among church leaders was to resolve the conflict and preserve the integrity of the congregation	<u>Data Gathering</u> - through survey and confidential interviews, identified the conflicted issues. Developed presentation of issues (language systemically). <u>Group Process</u> – half-day dialogue among congregation members (50+) toward the

			establishment of a new level of understanding, respect and acceptance.
August	Community Economic Development Organization	Board of Directors Annual Planning Retreat Desired Outcome - ensure the Board would make productive use of limited time to produce annual goals	<u>Group Process</u> – full-day dialogue among the 15 members, designed to identify economic development opportunities for Hispanic members of the community
December	Regional Transportation Planning Organization (MPO)	Board of Directors Annual Planning Retreat Desired Outcome - ensure the Board would make productive use of limited time to produce annual goals – avoid getting sidetracked by contentious political issues and differences	<u>Data Gathering</u> - through survey and interview, identify the issues and concerns of the fifteen members (senior elected officials in Central Florida) and ten significant non-member stakeholders <u>Group Process</u> – facilitate full-day of dialogue among Board members, stakeholders and agency staff to identify immediate priorities and develop Action Plan
December	The Seminole Vision, Inc. (Community Improvement Agency)	Board of Directors Annual Planning Retreat Desired Outcome - ensure the Board would make productive use of limited time to produce annual goals	<u>Group Process</u> – half day dialogue among the 18 board members, designed to identify areas when the organization could play a strategic role in community improvement action
1998			
Jan – Dec	The Seminole Vision, Inc. (Florida)	Mayors & Managers Dialogue Desired Outcome - facilitate dialogue between/among seven city mayors, seven city managers, the county manager, and the chair of county commission – toward ensuring open communication as they seek innovative ways to collaborate and/or reduce inevitable competition and conflict.	<u>Group Process</u> – facilitate open and direct communication between and among sixteen elected officials as they attempt to find common ground and balance constituent needs with the needs of the larger community and region. Group met as needed throughout 1998 (6 Meetings)
January	Economic Development Council	Board of Directors Annual Planning Retreat Desired Outcome - ensure the Board would make productive use of limited time to produce annual goals – avoid getting sidetracked by contentious political issues and differences	<u>Data Gathering</u> - through survey and interview, identify the issues and concerns of the ten members (Business Leaders and Elected Officials) senior elected officials in Central Florida) <u>Group Process</u> – full-day dialogue to identify immediate priorities and develop Action Plan
February	County Human Services	Stakeholder Input on Proposed New Youth	<u>Group Process</u> – dialogue among 8-10 stakeholders and treatment facility managers (4) toward the

	Department (Florida)	Treatment Facility Desired Outcome – ensure that all stakeholders who will be served by the new facility have an opportunity for voice regarding the treatment priorities and philosophy of the facility	creation of facility that will serve the needs of youth and be compatible with existing community resources
March	County Human Services (Florida)	Team Building: Communication & Collaboration Desired Outcome – build consensus on how to meet the needs of clients shared by two programs	<u>Group Process</u> – facilitate honest and creative conversation among staff members from two programs (within one department) that share responsibility for same clients
June	Professional Association (BioEthics)	Annual Board Planning Retreat Desired Outcome - ensure the Board would make productive use of limited time to produce annual goals	<u>Group Process</u> – design and facilitate two days of perception gathering, priority identification, and goal setting among six board members toward the development of a annual strategic plan
October	Chamber of Commerce (Seminole Co.)	Annual Board Planning Retreat Desired Outcome - ensure the Board would make productive use of limited time to produce annual goals	<u>Facilitate</u> – two days of perception gathering, priority identification, and goal setting among sixteen Board members and three staff toward the development of a annual strategic plan
December	Regional Transportation Planning Organization (MPO)	Board of Directors Annual Planning Retreat Desired Outcome - ensure the Board would make productive use of limited time to produce annual goals – avoid getting sidetracked by contentious political issues and differences	<u>Data Gathering</u> - through survey and interview, identify the issues and concerns of the fifteen members (senior elected officials in Central Florida) and ten significant non-member stakeholders <u>Group Process</u> – full-day dialogue among Board members, stakeholders and agency staff to identify immediate priorities and develop Action Plan
1997			
Jan – Dec	The Seminole Vision, Inc. (Florida)	Mayors & Managers Dialogue Desired Outcome - facilitate dialogue between/among seven city mayors, seven city managers, the county manager, and the chair of county commission – toward ensuring open communication as they seek innovative ways to collaborate and/or reduce	<u>Group Process</u> – facilitate open and direct communication between and among sixteen elected officials as they attempt to find common ground and balance constituent needs with the needs of the larger community and region. Group met as needed throughout 1997 (6 Meetings)

		inevitable competition and conflict.	
July-August	Engineering Company (Gainesville, FL)	Management Team Planning Retreat Desired Outcome – develop goals for new year with maximum buy in from all levels of management	<u>Data Gathering</u> - through confidential interviews complete a SWOT Analysis of the current status of the company. <u>Group Process</u> – facilitate full-day discussion of SWOT implications and business goals - develop new year business plan
August	Chamber of Commerce (Seminole Co.)	Annual Board Planning Retreat Desired Outcome - ensure the Board would make productive use of limited time to produce annual goals	<u>Group Process</u> – facilitate two days of perception gathering, priority identification, and goal setting among fourteen Board members and three staff toward the development of a Annual Strategic Plan
September	Construction Supply Company (Gainesville, FL)	Annual Manager's Meeting Desired Outcome – develop goals for new year with maximum buy in from all levels of management	<u>Data Gathering</u> - through confidential interviews complete a SWOT Analysis of the current status of the company. <u>Group Process</u> – facilitate full-day discussion of SWOT implications and business goals - develop new year business plan
November	The Seminole Vision, Inc.	2nd Vision Conference Desired Outcome – follow-up and support the community improvement initiatives established throughout the year	<u>Prep & Design</u> – designed as a follow-up to the October 1996 vision conference – a time to report-out progress and be re-energized <u>Group Process</u> – facilitated a full day conference for 85 community leaders – utilizing large group and break out group processes. <u>Utilize</u> – Future Search Strategies
1996			
February	Historical Society (Florida)	Staff Retreat & Team Building Desired Outcome – identify tensions and frustrations within the staff – provide a safe airing so the organization can refocus	<u>Assessment</u> – confidential interviews and staff survey designed to identify areas of frustration and tension <u>Group Process</u> - ½ day meeting (12 members) – provided everyone opportunity to air concerns and better understand each member's role/contribution
April	Professional Association (Hospital)	Conflict Resolution Desired Outcome – two groups within the association were at odds – the task was to help them find common ground	<u>Group Process</u> – facilitated a half day session of the 15 leaders within the two groups – provided a safe place to explore topics and discover some common ground
July	Engineering Company (Gainesville, FL)	Management Team Planning Retreat	<u>Data Gathering</u> - through confidential interviews complete a SWOT Analysis of the current

		Desired Outcome – develop goals for new year with maximum buy in from all levels of management	status of the company. <u>Group Process</u> – facilitate full-day discussion of SWOT implications and business goals - develop new year business plan
July	Community Agency (Florida)	Staff Team Building Desired Outcome – provide staff of residential treatment facility with opportunity to voice concerns – develop improvement strategies	<u>Assessment</u> – individual interviews with staff to determine concerns <u>Group Process</u> – facilitate full day team building meeting to air concerns and develop strategies for improving the organization
October	The Seminole Vision, Inc.	Vision Conference Desired Outcome – host a visioning conference and see if anyone would attend and if they did, could anything be accomplished that would be valuable	<u>Prep & Design</u> – approached by community leaders with the idea of creating a vision conference for senior community leaders – when this had never been done before in this community – and no one knew how to do it or if anyone would come <u>Group Process</u> – facilitated a day and half visioning conference for 104 community leaders utilizing large group and break out group processes – that resulted in the drafting of The Seminole Vision (statement) and the creation of a community improvement organization that would function for seven years <u>Utilize</u> – Future Search Strategies