ACTION ITEMS.

1. Legislative Items.
   - None.

2. Nonlegislative.
   - **Sportsmanship and Game Environment Initiative.**
     
     (1) **Recommendation.** Approve the use of $500,000, including $450,000 in new dollars, during the 2016-17 budget year to develop a sportsmanship and game environment training program in conjunction with the Disney Institute. [Attachments A and B] [NOTE: The Administrative Committee approved this recommendation on behalf of the Presidents and Management Councils on November 15, 2016. See Management Council Agenda No. 3b]

     (2) **Effective date.** Immediately.

     (3) **Rationale.** The working group’s primary goal is to create and sustain championship-level decorum and game environments at all Division III institutions. The training program’s three primary benefits for the Division III membership will be: (1) a five-module online training program designed for each institution to evaluate, learn and improve on its game environment and customer service standards; (2) game service standards that will define the proper environment at Division III for all regular season and championships athletics contests; and (3) toolkits and training through the Disney Institute that will ensure that the game standards are understood and able to be carried out for institutions at all resource levels.

     In addition to an introductory section, the primary learning modules of the online program will be: an institutional self-assessment tool; Division III game service standards; tools for assistance with conflict resolution and bystander intervention; and a template to create an institutional action plan to affect positive changes where needed. The online program will also integrate input and tools created by the Division III Student-Athlete Advisory Committee.

     The committee also emphasized the need to identify and incorporate evaluation criteria with the implementation of the initiative.

     (4) **Estimated budget impact.** $500,000 in 2016-17 and $250,000 annually in 2017-18 and 2018-19.

     (5) **Estimated student-athlete impact.** An improved game environment that will positively impact the student-athlete experience.
INFORMATIONAL ITEMS.

1. Report from the June 27, 2016, teleconference. The committee approved the report from its June 27, 2016, teleconference.

2. Budget. The committee reviewed the 2015-16 final budget, the 2016-17 budget-to-actual report as of September 30, 2016, and the future budget model. The budget-to-actual report reflects a three-year comparison with an additional column for charter expenses. The 2015-16 final budget reflected a $4 million surplus due to a higher than budgeted revenue and lower fuel costs for championship travel. The higher surplus has positively impacted the long-term future budget model. The final year, 2023-24, is the only year currently reflecting a deficit.

3. Discuss Potential 2017-19 Budget Initiatives.

   a. Championships. The committee reviewed an excerpt from the Championships Committee’s September in-person meeting report and requested NCAA staff provide a financial analysis on the following championship priorities, to be evaluated during Strategic Planning and Finance Committee’s March 2017 in-person meeting as part of the 2017-19 budget planning process:
   
   • Expand bracket/field sizes – 2017-18 bracket expansion for team sports based on legislated access ratio and analysis of field size expansion for individual sports where merited.
   • Increase team travel party size – increase by 10% across all sports or evaluate select sports based on average squad size among sponsoring institutions and those participating in the championship.
   • Reimburse teams flying to a championship site for local ground transportation – various ways to implement: (1) full expense; (2) fixed amount for duration of travel; and (3) fixed amount by travel day.
   • Add day off – implement a day of rest between semifinal and final rounds of team sports (if appropriate); requires an additional day of per diem.
   • Increase officials’ fees – institute increases gradually (e.g., two to three percent in a given year).
   • Sport committee initiatives – support various sport-specific operations or championship format requests.

   b. Nonchampionships.

   (1) Senior Woman Administrator Program. The committee received an update on the Division III senior woman administrator (SWA) program held October 8-9, 2016, in conjunction with the NACWAA Rally, noting 28 participants. The primary expectations met included networking and learning from others; education on expectations in the SWA role; and a focus on career advancement. During its March in-person meeting, the committee will evaluate funding this program during the next budget biennium.
(2) Faculty Athletics Representative (FAR) Institute. The committee received an update on the FAR Institute noting that $80,000 is currently budgeted for this program.

(3) Identity Initiative. The committee noted that the division recently signed a three-year contract extension (2016-19) with Source One Digital, which manages the Division III Purchasing Website. In September, a new $500 credit was offered to institutions and conferences for purchases during the 2016-17 year.

(4) Diversity and Inclusion. The committee reviewed a draft Division III hiring resource guide, noting the working group’s goal to have it available for the entire membership at the 2017 Convention.

4. Division III Conference Grant Program. During 2015-16, Division III distributed a total of $2,521,326 Strategic Initiative Grant dollars to 43 conferences plus the Association of Division III Independents. The amount each conference received ranged from $44,889 to $88,419 with an average distribution of $57,750. No unused funds were returned to the NCAA from conference offices this year.

During the review of the impact forms, the staff found that seven conferences misused grant funds, based on the established Conference Grant Policies and Procedures. The subcommittee reviewed these findings and issued a warning letter regarding the following concerns:

a. Capital Athletic Conference (CAC).

Issue: Tier One – Compliance. There is a Tier One annual requirement to spend some dollars in the area of “compliance and rules seminar education.” For 2015-16, there was no spending identified in this area.

b. Division III Association of Independents (Independents).

Issue No. 1: Tier One – sports information director (SID). Within Tier One, there is a requirement to spend at least $1,000 per year for member institutions’ SIDs. The Independents did not spend any money on SIDs during 2015-16.

Issues No. 2: Tier One – senior woman administrator (SWA). There is a Tier One annual requirement to spend some dollars in the area of “campus senior woman administrators.” The Independents did not spend any money on SWAs during 2015-16.

c. Great Northeast Athletic Conference (GNAC).

Issue: Tier One – faculty athletics representative (FAR). The GNAC did not report any money spent for an FAR, which is an annual spending requirement within the tier.
d. Heartland Collegiate Athletic Conference (Heartland).

**Issue:** Tier One – Ethnic Minority. Within Tier One, there is a biennial requirement to spend some dollars in the area of “ethnic minority professional development”. The Heartland did not spend any money in this area during 2014-15 or 2015-16.

e. New England Collegiate Conference (NECC).

**Issue:** Tier One – FAR. The NECC did not report any money spent for an FAR, which is an annual spending requirement within the tier.

f. Northern Athletic Conference.

**Issue:** Tier One – FAR. The Northern Athletics Conference did not report any money spent for an FAR, which is an annual spending requirement within the tier.

g. Upper Midwest Athletic Conference (UMAC).

**Issue:** Tier One – Ethnic Minority. Within Tier One, there is a biennial requirement to spend some dollars in the area of “ethnic minority professional development”. The UMAC did not spend any money in this area during 2014-15 or 2015-16.

5. **2016 Women’s Basketball Joint Championship.** The committee reviewed a financial summary from the 2016 combined women’s basketball championship, noting it was underbudget by 51.7% primarily due to favorable team travel charges.

6. **Hot Topics.**

   a. **NCAA Board of Governors updates.** The committee received an update on recent Board of Governors actions, primarily: (1) Presidents Diversity Pledge; (2) championships and event policy (i.e., North Carolina); (3) alcohol pilot program at Division III men’s lacrosse; and (4) resolution on roles, responsibilities and composition.

   b. **Institutional Performance Program (IPP).** The committee received an update on the IPP noting it officially launched in October.

   c. **2017 Legislative Proposals.** Staff noted the Division III legislative proposals for the 2017 NCAA Convention.

7. **Future Meetings.** The Strategic Planning and Finance Committee will hold its in-person meeting Tuesday, March 21 from 8 a.m. to 2 p.m. at the NCAA national office.
8. **Adjournment.** The meeting adjourned at 11:30 a.m.

**Committee Chair:** Jay Lemons, Susquehanna University, Landmark Conference  
**Staff Liaisons:** Louise McCleary, Division III Governance  
Dan Dutcher, Division III Governance  
Eric Hartung, Research  
Jay Jones, Division III Governance  
Jeff Myers, Academic and Membership Affairs  
Jeff O’Barr, Administrative

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**NCAA Division III Strategic Planning and Finance Committee**  
**November 10, 2016, teleconference**

**Attendees:**  
Gail Cummings-Danson, Skidmore College  
Jeff Docking, Adrian College  
Margaret Drugovich, Hartwick College  
Shantey Hill, St. Joseph’s College (Long Island)  
Brit Katz, Millsaps College  
Jay Lemons, Susquehanna University, chair  
Candice Poiss Murray, North Eastern Athletic Conference  
Chris Ragsdale, Heartland Collegiate Athletic Conference  
Tracey Ranieri, State University of New York at Oneonta  
Brian Wigley, Shenandoah University  
Dave Wolk, Castleton University  
Greg Woods, Springfield College  
Gerald Young, Carleton College

**Absentees:**  
Troy VanAken, Elmhurst College.

**NCAA Staff Support in Attendance:**  
Dan Dutcher, Reed Fogle, Jay Jones, Debbie Kresge and Louise McCleary.

**Other NCAA Staff Members in Attendance:**  
Brian Burnsed, Eric Hartung, Jeff Myers, Jeff O’Barr, Adam Skaggs and Liz Suscha.
CREATING AND SUSTAINING A CHAMPIONSHIP CULTURE

A GAME PLAN DOCUMENT FOR

NCAA DIVISION III
THE FAN EXPERIENCE

The secret to exceeding your fans’ expectations every time is not about doing any one thing 1,000% better; it’s doing many things throughout the fan experience just a little bit better. When combined, these details in your customer touchpoints create magic.

Walt Disney understood this and had an eye for detail, a deep understanding of what his Guests (customers) wanted, the know-how to execute his vision, and the ability to engage employees to perform their best toward that vision.

Walt created an effective corporate culture founded in values-based leadership, where employees are recognized for their achievements and encouraged to work as a team to exceed the expectations in our customer experiences around the world.

As one of the most recognized names in the industry, Disney Institute empowers organizations to create lasting change by bridging insight into action through Disney Best Practices.

Disney Institute would be honored to help NCAA Division III (“NCAA DIII”) achieve your goals. We invite you to experience the business behind the magic and “D’Think” your way to success.

TOUCHPOINTS DURING A SINGLE CUSTOMER EXPERIENCE

Quality service is the cumulative result of things going right at every possible touchpoint.
## The Business Case

Based on leading research, there are three areas that are among the most pressing business challenges today:

<table>
<thead>
<tr>
<th>Quality Service</th>
<th>Employee Engagement</th>
<th>Leadership Excellence</th>
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</thead>
</table>
| *What is the Priority Level?* | *Why is it a Critical Success Factor?* | *How Far is the Gap?*
| Creating a strong, customer-centric culture is the #1 strategy favored by CEOs globally.¹ | Front-line staff is critical to solving this challenge because they represent your brand. Enabling them to exceed customer expectations consistently is key. | "...The vast majority of companies struggle to tie customer experience investments to business outcomes."² |
| Employee Engagement is one of the top two issues for HR.³ | A good company culture is at the center of solving many issues. Without an engaged workforce, improving customer experience and other goals are practically impossible. | Companies that have good cultures consistently outperformed the S&P 500, while those known for poor cultures under-performed.⁴ |
| ⁸⁶% rated leadership as “urgent” or “important.”⁵ | Only ¹³% say they do an “excellent” job in providing leadership development at all levels.⁵ | Only ¹⁵% believe they are ready to address it.⁵ |

### Sources:
THE DISNEY INSTITUTE DIFFERENCE

PRACTICAL

We shift perspectives by showcasing key business insights and real-world illustrations from our operations that showcase what success looks like.

INSPIRATIONAL

We leverage storytelling to inspire action and involve all levels to empower and align the team. This process enables maximum collaboration so everyone has ownership and connection throughout the journey.

ACTIONABLE

We drive results and sustainability by facilitating dialogue, acting as coaches, and developing action plans to implement new ideas, so approaches do not fade over time.

AUTHENTIC

Our team members are true “insiders.” Well-versed in business and passionate about Disney, they have worked in a variety of fields from marketing, sports, sales, retail, resorts, and guest relations, to HR, training, and entertainment.
## Our Comprehensive Approach

As part of our comprehensive approach, we include all levels of NCAA DIII, giving each group the information they need to solve their problems to take your organization to the next level.

- At the **executive level**, we work to transform your senior leaders’ thinking by helping them understand our strategies.
- We work with your **mid-level managers** to benchmark our best practices and help them inspire and engage your front-line leaders and staff.
- With your company’s **front-line leaders and staff**, we train them to develop the skills and behaviors necessary to bring NCAA DIII’s vision to life.

<table>
<thead>
<tr>
<th>Audience</th>
<th>Gap/Need</th>
<th>Solution</th>
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</thead>
<tbody>
<tr>
<td>Executives</td>
<td>Transformational “Thinking”</td>
<td>Understand Strategies</td>
</tr>
<tr>
<td>Mid-Level Managers</td>
<td>Organizational “Enhancements”</td>
<td>Benchmark Best Practices</td>
</tr>
<tr>
<td>Front-Line Leaders &amp; Staff</td>
<td>Performance “Upskill”</td>
<td>Train Skills &amp; Behaviors</td>
</tr>
</tbody>
</table>
INSIGHTS-BASED APPROACH

Disney Institute uses a unique insights-based approach. Insights are designed to be thought provoking and challenge you to think differently to create solutions to your specific business challenges.

Our Approach Focuses on:

- **Prioritizing key themes** that emerge as we discover your company’s key goals and objectives
- **Identifying the frustration or problems** your company may be facing that are barriers to those goals and objectives
- **Showcasing a key insight, or belief,** on how businesses tackle that problem
- **Discovering a Disney Best Practice** through illustrations that may include:
  - Field Experiences
  - Video Case Studies
  - Experiential Activities
  - Interactive Storytelling
- **Adapting and applying those insights and illustrations** in a way that is relevant to your company

**DISNEY INSTITUTE’S DEFINITION OF “OVERMANAGE”**

Overmanage is not the same as micromanage.

**DISNEY INSTITUTE THESIS**

“Disney’s consistent business results are driven by overmanaging certain things that most companies under manage or ignore—and that is a key source of what differentiates us. We have learned to be intentional where others are unintentional.”

**SAMPLE INSIGHT**

“Recognition is more powerful than most organizations can imagine.”
HOW WE THINK

The premise for how we can work together begins with understanding Disney’s “Chain of Excellence.” Each link of the chain is interdependent, and together the links drive business results and forge an enduring bond between inspired leaders, motivated employees, and satisfied customers. This drives financial results and sustains years of repeat business.

**DISNEY’S CHAIN OF EXCELLENCE**

**Leadership Excellence**
Effective Disney leaders create an environment in which both internal and customer-facing employees can thrive and deliver superior performance.

**Cast Excellence**
Disney leaders create superior employee performance through a culture where Disney Cast Members receive effective feedback, as well as have the authority to give input, and make and implement decisions.

**Guest Satisfaction**
When the Disney Cast is coached and empowered to make memories that last a lifetime through our Service Framework, Guests rate their experience with us higher.

**Business Results**
Tested data has shown that all of these elements are inextricably linked and drive results.
HOW WE WORK

As Disney’s insights and illustrations are what we teach, how we work comes together in our time-tested Engagement Model. This model bridges insights into sustained action and empowers organizations to create a lasting initiative.

OUR ENGAGEMENT MODEL

UNDERSTAND & PRIORITIZE
Your Needs
We go beyond the typical advisory assessment to gain an understanding of your organization so that we can make a real impact.

OPERATIONALIZE & SUSTAIN
for Ongoing Success
To sustain your desired initiative for the long term, Disney Institute provides sustainment strategies, ongoing coaching, and skills-based training.

ADAPT & APPLY
Disney Best Practices
This is when the real magic happens, where your organization begins to determine for itself which Disney approaches/benchmarks make sense for NCAA DIII.

REORIENT & UPSKILL
Your Teams
The key to rolling out the initiative is an inspiring and motivational launch. This is when Disney Institute engages your leaders, managers, and front-line staff to embrace the initiative and focus on the goals and objectives established.

Your Disney Institute Engagement Team supports and energizes your organization by:
- Acting as coaches
- Enabling the creation of unique content
- Advising you through the Disney perspective
Disney Institute has developed the following timeline as an engagement resource for NCAA DIII.

### The Game Plan

**Continuous Communication & Leader Alignment (Throughout Journey)**

#### Understand & Prioritize
- **Discovery Visit**
  - 2 Athletic Departments, TBD
  - 3 Days
  - Nov. 2016

#### Adapt & Apply
- **Service Standards & Behaviors Creation**
  - Indianapolis, IN
  - 2 Days
  - Feb. 2017

- **Pilot Service Framework #2**
  - Athletic Department, TBD
  - 2 Days
  - Early Mar. 2017

#### Re-Orient & Upskill
- **Common Purpose & Service Standards Creation**
  - Walt Disney World® Resort
  - 2 Days
  - Late Jan. 2017

- **Storytelling and Support of Service Framework**
  - Indianapolis, IN
  - 2 Days
  - Late Mar. 2017

- **Ambassador Engagement Session**
  - Walt Disney World® Resort
  - 2 Days
  - Jul. 2017

- **E-Learning Rollout**
  - Virtual
  - Aug. 2017
Disney Institute has developed the following timeline as an engagement resource for NCAA DIII.

**The Game Plan (Continued)**
## Proposed Engagement Details

<table>
<thead>
<tr>
<th>Timeline</th>
<th>Description</th>
</tr>
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</table>
| **Discovery Visit**  
Nov. 2016  
2 Athletic Departments, TBD  
(2 Days) | During your Discovery Visit, Disney Institute will:  
- Observe the game day experiences at these schools and conduct interviews (private and group) with Athletics department staff members. These interviews will:  
  - Offer opportunities to delve deeper into common themes and opportunities.  
  - Entertain nuances of opinion and perception of the current NCAA DIII organizational culture from individual points of view.  
- Review existing customer and employee satisfaction metrics, as well as leadership behavioral expectations, current customer service models, and existing customer service training. |
| **Common Purpose & Service Standards Creation**  
Late Jan. 2017  
Walt Disney World® Resort  
(2 Days) | In your Common Purpose & Service Standards Creation session, Disney Institute will help your leaders create important components of a Service Framework for the DII Fan Experience, which include a Common Purpose and Service Standards. During the session, your Disney Institute team will:  
- Explain our journey together and how these deliverables fit into a larger picture.  
- Present a brief overview of how Disney approaches these deliverables.  
- Work on the cornerstone of a Service Framework for NCAA DIII (A Common Purpose and Service Standards).  
For more detailed information regarding your Service Framework, see page 13 of this document. |
| **Service Standards & Behavioral Guidelines Creation**  
Feb. 2017  
Indianapolis, IN  
(2 Days) | In your Service Standards & Behavioral Guidelines Creation session, Disney Institute will help your leaders complete the remaining components of a Service Framework for NCAA DIII, which include prioritizing Service Standards and creating Behavioral Guidelines. During the session, your Disney Institute team will:  
- Explain our journey together and how these deliverables fit into a larger picture.  
- Present a brief overview of how Disney approaches these deliverables.  
- Finalize the previously drafted Service Standards for NCAA DIII.  
- Help your leaders in developing defined Behavioral Guidelines for each Service Standard that support a consistent, service-centric customer experience.  
For more detailed information regarding your Service Framework, see page 13 of this document. |
| **Service Framework Pilot #1**  
Late Feb. 2017  
TBD  
(2 Days) | Once we have finalized the Service Framework together, the next step is to work with different DIII Athletic Departments to put the Service Framework into action. Through this process your Disney Institute team will:  
- Gather best practices  
- Gain illustrations for practical use of the Service Framework  
- Uncover obstacles to uptake so we can adjust messaging for when it is communicated out to the rest of the DIII Athletic Departments  
- Create advocates for the Service Framework with the Pilot Athletic Departments |
| Service Framework Pilot #2 | Once we have finalized the Service Framework together, the next step is to work with different DIII Athletic Departments to put the Service Framework into action. Through this process your Disney Institute team will:  
• Gather best practices  
• Gain illustrations for practical use of the Service Framework  
• Uncover obstacles to uptake so we can adjust messaging for when it is communicated out to the rest of the DIII Athletic Departments  
• Create advocates for the Service Framework with the Pilot Athletic Departments |
| --- | --- |
| Early Mar. 2017  
TBD  
(2 Days) | In your Compilation & Storytelling of Service Framework session, your Disney Institute team will:  
• Work with the NCAA DIII Fan Experience team to adapt and apply DIII illustrations to the DIII Service Framework.  
• Incorporate lessons learned from Service Framework Pilot #1 and Service Framework Pilot #2 into content for DIII Service Framework.  
• Facilitate conversation around storytelling components to help NCAA DIII communicate their Service Framework in a vivid and imaginative way.  
• Discuss accountability for schools to use the Service Framework.  
• Discuss recognition to recognize athletic departments excelling in their use of the Service Framework.  
• Discuss strategies to incentivize athletic departments to use the Service Framework  
• Discuss additional support offerings for schools expressing deeper support |
| Storytelling and Support of Service Framework | The mission of the Ambassador Engagement Session is to develop culture advocates who can serve as trainers and “super users” to lead and role model the NCAA DIII’s enhanced service culture. Disney Institute will facilitate a deep-dive immersion in your Service Framework at a local level and Disney’s approach to the customer experience and world-class service.  
• Training will include content from Disney’s Approach to Quality Service and the NCAA DIII Service Framework.  
• Training will also focus on how to become a better trainer and facilitator from Disney’s Facilitation Skills program.  
• The result will be a group of skilled and motivated trainers who will serve as coaches and motivate their colleagues to embrace their roles in the service initiative. |
| Early April. 2017  
Indianapolis  
(2 Days) | It is critical for both leaders and staff to understand that a service-focused culture is not just about an event, but about excellence in service every day and in every interaction, driving consistency and accountability. In your DIII Fan Experience Summit, your Disney Institute engagement team will:  
• Conduct high-energy rollout sessions for all employees and staff, introducing and reinforcing the newly designed NCAA DIII Service Framework.  
• Explain how to apply your Service Framework to all roles and responsibilities.  
• Provide Disney-proven insights on how to integrate the appropriate behaviors in your employees’ daily roles to drive increased employee engagement and consistent, exceptional service delivery. |
| DIII Fan Experience Summit | A condensed, regionally located version of the DIII Fan Experience Summit. This version of the Summit will be created to offer an additional date for those schools interested in creating a service mindset, but who may have had a conflict in attending the DIII Fan Experience Summit at the Walt Disney World Resort. |
| July 2018  
Walt Disney World® Resort  
(2 Days) | Ambassador Engagement Session  
July 2017  
Walt Disney World® Resort  
(2 Days)  
Regional Game Environment Summit #1  
July 2018  
Walt Disney World® Resort  
(1.5 Days) |
<table>
<thead>
<tr>
<th>Event</th>
<th>Details</th>
</tr>
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<tbody>
<tr>
<td><strong>Regional Game Environment Summit #2</strong>&lt;br&gt;July 2018&lt;br&gt;<em>Walt Disney World® Resort</em>&lt;br&gt;(1.5 Days)</td>
<td>A condensed, regionally located version of the DIII Fan Experience Summit. This version of the Summit will be created to offer an additional date for those schools interested in creating a service mindset, but who may have had a conflict in attending the DIII Fan Experience Summit at the <em>Walt Disney World® Resort</em>.</td>
</tr>
</tbody>
</table>
| **DIII Fan Experience Summit**<br>July 2019<br>*Walt Disney World® Resort*<br>(2 Days) | It is critical for both leaders and staff to understand that a service-focused culture is not just about an event, but about excellence in service every day and in every interaction, driving consistency and accountability. In your DIII Fan Experience Summit, your *Disney Institute* engagement team will:  
  • Conduct high-energy rollout sessions for all employees and staff, introducing and reinforcing the newly designed *NCAA DIII Service Framework*.  
  • Explain how to apply your Service Framework to all roles and responsibilities.  
  Provide Disney-proven insights on how to integrate the appropriate behaviors in your employees’ daily roles to drive increased employee engagement and consistent, exceptional service delivery. |
| **Regional Game Environment Summit**<br>July 2019<br>*Walt Disney World® Resort*<br>(1.5 Days) | A condensed, regionally located version of the DIII Fan Experience Summit. This version of the Summit will be created to offer an additional date for those schools interested in creating a service mindset, but who may have had a conflict in attending the DIII Fan Experience Summit at the *Walt Disney World® Resort*. |
| **Regional Game Environment Summit**<br>July 2019<br>*Walt Disney World® Resort*<br>(1.5 Days) | A condensed, regionally located version of the DIII Fan Experience Summit. This version of the Summit will be created to offer an additional date for those schools interested in creating a service mindset, but who may have had a conflict in attending the DIII Fan Experience Summit at the *Walt Disney World® Resort*. |
ENGAGEMENT OUTCOMES

THE SERVICE FRAMEWORK

A Service Framework is the foundation of building a service-focused culture. A Service Framework consists of a Common Purpose, Service Standards, and Behavioral Guidelines.

A Common Purpose defines an organization’s purpose, aligns that purpose with customer expectations, and communicates that alignment to employees. A Common Purpose is the essential foundation on which all other service decisions can be developed.

Service Standards are those operating priorities that ensure a consistent and high-quality customer service experience.

Each of these Service Standards has Behavioral Guidelines that are clearly defined and measurable, and are aligned to create a world-class customer service experience.
HELPING COMPANIES AROUND THE WORLD

Since the founding of Disney Institute in 1986, millions of professionals from 45 countries have experienced the time-tested best practices, sound methodologies, and real-life business lessons that have sustained Disney’s global success.

BROOKLYN NETS/BARCLAYS CENTER CASE STUDY

Situation:
Barclays Center is a multi-purpose indoor arena in Brooklyn, N.Y., that is home to the Brooklyn Nets and host to concerts, conventions, and sporting events. The Brooklyn Nets’ leadership saw an opportunity to differentiate the arena by providing outstanding customer service from the moment the doors opened. With help from Disney Institute, Barclays Center established a customer service leadership model designed to make each guest’s visit to Barclays Center memorable.

Disney Institute Solution:
Senior leadership from the Brooklyn Nets, AEG, and Levy Restaurants began work with Disney Institute to develop a methodology for delivering top-notch service to Barclays Center guests by uniting the different business units around a common service framework. They created the “Brooklyn’s Best” service strategy that unites expectations, language, symbols, stories, and values for all employees. This in turn creates a seamless, well-organized experience for guests.

Key Results:
The finishing touches were put on the arena, and it opened to the public in September 2012. The arena itself has received accolades for its architecture, but as one visitor noted, the thing that truly sets the Barclays Center apart is the staff: “It’s unlike anything we’ve experienced. Helpful isn’t the word. Gracious is. So is proud… We had one staffer walk us the entire length of the arena to help us get where we’re going.”
Brooklyn Nets owner Bruce Ratner said that of all the things at the Barclays Center, he is most proud of the arena staff, stating: “The No. 1 compliment I get about the arena is about the people who work there. They’re friendly, helpful, and so on. I’m probably proudest of that among anything else.”

ORLANDO MAGIC/AMWAY CENTER CASE STUDY

Situation:
Faced with mediocre customer service results and a scheduled relocation to the newly built Amway Center, the Orlando Magic basketball organization turned to Disney Institute to help introduce a new service-oriented culture to its nearly 1,000 employees.

Disney Institute Solution:
After meeting with the Orlando Magic’s senior management, Disney Institute recommended a series of sessions about leadership excellence, all designed to improve the fan experience and positively impact the bottom line. In all, nearly 1,000 employees attended the Disney Institute sessions.

Key Results:
- By implementing a wide range of Disney Best Practices, the Orlando Magic saw employee morale soar and customer service satisfaction results jump to 95%.
- Amway was honored with the 2013 Customer Experience Award during the Stadium Business Awards presentation in Manchester, England. It was the largest dedicated meeting in the world of the owners, operators, and developers of the world’s leading stadiums, arenas, and major sports venues.
- Amway Center was named “Sports Facility of the Year” in 2012 by the Sports Business Journal.
## YOUR INVESTMENT

Below is the investment for our potential engagement, based on our recent conversations.

<table>
<thead>
<tr>
<th>ROADMAP</th>
<th>TOTAL COST</th>
</tr>
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<tbody>
<tr>
<td>Discovery Visit <em>(2 Athletic Departments, TBD)</em></td>
<td></td>
</tr>
<tr>
<td>Common Purpose &amp; Service Standards Creation <em>(Walt Disney World® Resort)</em></td>
<td></td>
</tr>
<tr>
<td>Service Standards &amp; Behaviors Creation <em>(Indianapolis, IN)</em></td>
<td>$380,800</td>
</tr>
<tr>
<td>Pilot Service Framework #1 <em>(Athletic Department, TBD)</em></td>
<td></td>
</tr>
<tr>
<td>Pilot Service Framework #2 <em>(Athletic Department, TBD)</em></td>
<td></td>
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<tr>
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Changes to the scope and/or length will affect pricing. Pricing subject to change until signed contract is received. All pricing is in USD.

### PRICING DETAILS

**Pricing Includes:**
- Design and development time
- Delivery of advisory and training services by Disney Institute team member(s)
- Materials (as needed)
- Coordination of logistics for services

**Pricing Does Not Include:**
- Audio/visual requirements
- Food and beverage
- Venue rental fees
- Reimbursable travel expenses for each Disney Institute Engagement team member:
  - Coach class airfare to and from your site(s)
  - Accommodations
  - $125 per day for ground transportation, meals, and incidentals
- Applicable taxes
We are honored to have the potential opportunity to further work with your team. Please take a moment to review the ground rules on the next page that lay the foundation as we continue our journey. We look forward to working with NCAA Division III on this initiative to create and sustain a championship culture!

**Thank You!**

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Account Manager  
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“**You can design and create, and build the most wonderful place in the world. But it takes people to make the dream a reality.**”

—Walt Disney
GROUNDS RULES

As a necessary formality, we would like to confirm the basis on which we are proceeding with our discussions. Accordingly, by continuing our discussions, each party agrees to the following ground rules:

1) During our discussions, neither party will be exchanging any confidential or proprietary information, and any ideas or information shared between the parties may be used or disclosed by either party without liability or compensation.

2) Each party will keep confidential the fact that the parties are engaged in these discussions.

3) Our discussions are non-binding in nature, and unless and until a mutually acceptable written agreement is signed by both parties, either party will have the right to discontinue these discussions at any time without liability or obligation.

All of us at Disney Institute are extremely excited about the opportunity to have these continued discussions. Thank you!
Disney Institute, NBA align

by John Lombardo, Staff Writer • Nov. 4, 2013 • 2 min read • original

SBJ/Nov. 4-10, 2013/Leagues and Governing Bodies

The NBA is partnering with the Disney Institute to create a leaguewide customer service program to improve the fan experience at NBA arenas.

A steering committee of about nine NBA teams and key concessionaires Levy Restaurants and Aramark met recently with Disney Institute executives in Orlando to begin the creation of a standardized arena customer service program.

SBJ Podcast:
John Lombardo & Abraham Madkour discuss the NBA’s effort with the Disney Institute.

Participation in the program, which is still being developed, will be voluntary, with a near six-figure annual cost to be paid by each participating team. The program will include strategies for teams to improve customer service during game nights along with employee training, and the development of specific customer service standards that will be put into place over time.

Sources said that the Indiana Pacers, Miami Heat, Brooklyn Nets, Orlando Magic and San Antonio Spurs are part of the league’s steering committee, but league officials would not disclose the teams. The Nets and the Magic have used Disney training in the past.

Disney Institute executives will travel to participating NBA teams to customize the program. The number and names of participating teams have not yet been made final, but the program will begin this season and was largely driven by the NBA’s team
marketing and business operations department.

“We are working with Disney to set our own service standards,” said Amy Brooks, senior vice president of the NBA’s team marketing and business operations department. “It will be position specific. There will be behavior guidance for what an usher will do, what a concessionaire will do, or what a ticket taker will do.”

The Disney Institute for two decades has been working with companies to improve customer service and employee training. In recent years, it has worked with a variety of sports clients, including the NFL and major college sports programs such as Michigan State, Tennessee and Arizona State.

While other leagues have used outside services, this marks a deeper alignment where a league has partnered with a group to formulate a specific set of industry standards on the fan experience. It comes at a time when all teams are focused on improving the door-to-door and especially in-arena experience. Disney has forged a solid reputation since making sports a key growth area of its business, and teams that have worked with it praised the approach and training resulting in stronger customer service.

“The focus on the fan experience was a guiding principle into every piece of the development of the Amway Center and it manifested itself through our relationship with the Disney Institute,” said Alex Martins, chief executive officer of the Orlando Magic, who is helping lead the NBA’s expanded involvement with the Disney Institute. “At this point, there is a pilot program with a handful of teams as the first step. Beyond that, there is a league intent to provide it in every one of its buildings.”

The Magic has spent roughly $500,000 with the Disney Institute since the Amway Center opened in 2010, which includes the first-time training and subsequent follow-up. Disney Institute staffers are not embedded within a team organization but visit frequently.

The Nets last year become a Disney client and have extended their agreement to continue to train Barclays Center employees.
“We have aligned with them in every way we can,” said Brett Yormark, chief executive officer of the Brooklyn Nets and Barclays Center. “Other NBA teams are now giving it a shot. The league wants to get the consistency across all NBA venues.”

“Our goal is to create the best game experience in sports,” Brooks said. “Disney is a brand that is known for exceptional service.”

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