

# CURRICULUM VITA

**John Juzbasich D.Ed. ABD, MLD, PMP**

119 North Fairfield Road

Devon, PA 19333

(610) 613-1693

jjuzbasich@meritsystemsllc.com

## EDUCATION

### **The Pennsylvania State University**

Doctorate of Adult Education, D.Ed. ABD

Completed all studies.

Master of Leadership Development, 2006

### **Temple University**

Studies in Educational Psychology and Quantitative Research Design as components of the Penn State Doctorate of Adult Education degree program

### **Wharton School of Business, University of Pennsylvania**

B.S. degree in Economics, Accounting Major, 1977

## PROFESSIONAL EXPERIENCE

SEPTEMBER 2001 TO PRESENT

### **Merit Systems LLC, DBA Merit Career Development**

POSITION: Chief Executive Officer, Founding Partner of Merit Systems LLC and Principal of the Human Resources Development (HRD) business unit.

RESPONSIBILITIES: Executive leadership and management of the organization; provide strategic direction and guiding business principles; overall HRD program and curriculum development. Manage all education product development projects including instructor led training, web and computer based instruction, and video training. Responsible for quality control and incorporation of adult learning methods and techniques into the training interventions.

### ACCOMPLISHMENTS:

- Established a new company during a difficult business climate and grew the firm to fifteen employees, with my business partner, James J. Wynne.
- Authored, co-authored and delivered many training programs (see Course Development).
- Executive producer of distance learning programs both DVD and web-based.
- Approved as a State of California Board of Registered Nursing *Certified education Provider*
- Awarded a US General Services Administration (GSA) federal contract
- Authorized as a *Registered Education Provider* for the Project Management Institute.

- Approved onto the *National Registry of Certified Professional Education Sponsors* by the National Association of State Boards of Accountancy (NASBA)
- Sanctioned as a *Certified Education Provider* for Hitachi Data Systems Corporation worldwide.
- Designed many custom interventions for clients, see Courses Developed below.
- See <http://www.meritcd.com> for more information.

MAY 2021 TO PRESENT

**Easttown Township, Chester County Pennsylvania**

POSITION: Majority Inspector of Elections, an elected position for a four year term.

RESPONSIBILITIES: Check voters’ registration documents and prepare certificates to authorize voters to cast their ballots on election days. Ensure that the voting process is legal and administered fairly by verifying the signatures of voters as they sign the poll book. Responsible for checking that the voting machine numbers are accurate at the end of the election day. Prepare the polling place for its opening, instruct voters in the use of the voting machines, enforce voting regulations, and sign all printed copies of the election results printed by the voting machines.

APRIL 2021 TO PRESENT

**Cayuga Partners LLC**

POSITION: Associate and Project Manager

RESPONSIBILITIES: Regularly teach project management classes and lead projects for Cayuga Partners. Project Manager on the JFK Truck Flow Management System.

JULY 2020 TO SEPTEMBER 2020

**United States Census Bureau**

POSITION: Enumerator

RESPONSIBILITIES: Collect census data by conducting interviews door-to-door. Gather information on the number of people living in specific residences in the local community. The work is performed every ten years during the census period.

JANUARY 2020 TO PRESENT

**Rutgers University**

POSITION: Instructor

RESPONSIBILITIES: Teach in their Executive Education Program. Several project management topics including *Project Management Professional (PMP®) Exam Prep*: this online course provides a comprehensive review of project management concepts, terminology, tools and techniques necessary to pass the PMI® PMP examination.

JANUARY 2019 TO PRESENT

**Data-Core Systems, Inc.**

POSITION: Senior Advisor

RESPONSIBILITIES: Counsel executive leadership and management regarding the development of a data strategy and implementation of artificial intelligence and blockchain applications to solve a variety of business challenges.

JANUARY 2016 TO PRESENT

**Lehigh University**

POSITION: Instructor

RESPONSIBILITIES: Teach in their Vistex Institute for Executive Learning & Research.  
Project management and other topics.

JANUARY 2016 TO PRESENT

**West Chester University**

POSITION: Instructor

RESPONSIBILITIES: Teach in their Continuing Professional Education Division. Leadership,  
project management and other topics.

JANUARY 2015 TO 2020

**Infopro Learning, Inc.**

POSITION: Senior Consultant

RESPONSIBILITIES: Counsel executive leadership and management regarding client  
development opportunities, course development and delivery. Lead course design teams  
and facilitate courses for clients.

JUNE 2012 TO AUGUST 2019

**The Pennsylvania State University. School of Graduate Professional  
Studies, Great Valley, PA**

POSITION: Adjunct Professor

RESPONSIBILITIES: Teach in their Master of Leadership Development and MBA graduate  
programs.

Leadership course: *Strategy Focused Leadership*. This course provides an understanding  
of the requirements for effective strategic leadership in organizations operating in high-  
technology environments as assessed by the Balanced Scorecard. Topics include steering  
complex innovation, promoting collaboration within and between teams, and developing  
intellectual and social capital to support innovation to increase organization value.

NOVEMBER 2007 TO 2010

**Eastern University. Campolo College of Graduate & Professional Studies**

POSITION: Adjunct Professor

RESPONSIBILITIES: Teach courses for the university in their *Fast-Track* MBA program and  
*Organizational Leadership* program.

Organizational Leadership courses: *Strategic Leadership, Leading Change, Cross  
Cultural Studies*, topics include discovering one's leadership and character strengths,  
applying leadership concepts strategically in an organizational setting, integration of  
leadership knowledge and skills to set and achieve goals and objectives, organizational  
change theory and methods. *Quantitative Decision Making*, topics include linear and  
integer programming, time-series forecasting, project forecasting, and other quantitative  
decision making methods.

MAY 2005 TO 2010

**West Africa American Trading Company, Inc.**

**POSITION:** Chairman of the Board, President and CEO

**RESPONSIBILITIES:** Set overall strategic direction of the company and manage the executive team. Introduce investors and Liberian government officials to WAATCO products and services and our *Triple P (People, Planet, Profit)* bottom line concept of *Corporate Social Responsibility*, benefiting the **People** of Liberia, our **Planet** through re-use of clothing, textbooks and personal computers from the USA in Liberia, and our business **Profit** objectives.

**ACCOMPLISHMENTS:**

- Recruited investors and an executive team.
- Set up operations in Wayne, PA, and in Monrovia, Liberia.
- Visited Liberia and hired a team in Monrovia, Liberia to conduct operations.
- Delivered over 40,000 elementary and secondary education textbooks to schools in Liberia.
- Distributed over 100 large bags of children's clothing to orphanages in Liberia.
- Shipped several hundred personal computers to Liberia.
- Bestowed the title of *Honourary Paramount Chief of Lofa Gola Chiefdom, Klay District, Bomi County*, by the mayor and citizens of Tubmanburg, Liberia
- Present the WAATCO *CSR/PPP* business model at universities to business students

JANUARY 2001 TO AUGUST 2001

**NIIT (USA) Inc.**

**POSITION:** Business Development Manager

**RESPONSIBILITIES:** Sold custom off-shore software development services in India, including e-Transformations, legacy application migrations/re-engineering, data consolidations and conversions to clients in the Mid-Atlantic Region (PA through VA). Worked with WebSphere, WebMethods, Ariba, and other e-Business software environments.

**ACCOMPLISHMENTS:**

- Advised and trained new sales representatives.
- Presented NIIT skills and services to prospective clients.
- Worked with clients to create offshore development centers in India.

MAY 2000 TO DECEMBER 2000

**Level 8 Systems, Inc.**

**POSITION:** Large Account Sales Representative

- **RESPONSIBILITIES:** Sold object oriented (OO) Enterprise Application Integration, EAI, software and an OO application development environment. Work with CIO's and their software architects on complex e-Business environments requiring rapid request/response from legacy applications, bridging to the new web and client/server worlds. Work at business shows and industry events.

**ACCOMPLISHMENTS:**

- Advised and trained new sales representatives.
- Performed marketplace analysis and recommended products enhancements to upper management.

JANUARY 1999 TO APRIL 2000

**Unisys Corporation**

POSITION: National Sales Director, Thin Client Computing

RESPONSIBILITIES: Responsible for Thin Client sales and marketing programs for the US.

Determined and recommended resource and product requirements. Worked with field sales personnel on large complex customer situations. Assessed and monitored corporate thin client plans and programs and made appropriate changes.

ACCOMPLISHMENTS:

- Designed and implemented a Thin Client business plan.
- Built a Thin Client business partner program.
- Attained 118% of revenue objective.

OCTOBER 1998 TO SEPTEMBER 1999

**Micro Focus, Inc.**

POSITION: Large Account Sales Executive

RESPONSIBILITIES: Responsible for a sales territory generating over \$5M in software revenues, handling large accounts in the DC-VA-Carolinas geography; specializing in Year 2000 software re-engineering and programmer productivity tools.

ACCOMPLISHMENTS:

- Average monthly attainment of 150% of sales quota.
- Micro Focus Quarterly Sales Leader Award, June 1999

JUNE 1995 TO SEPTEMBER 1998

**Centron DPL, Inc.**

POSITION: Regional Sales Representative

RESPONSIBILITIES: Rejuvenated a sales territory and expanded it to a district office for Centron—a large distributor of computer WAN and LAN networking equipment. Initiated marketing and sales strategies and programs to established long term client relationships with very large firms in the Philadelphia-Baltimore-Washington corridor, with a focus on the telecommunications and finance industries. Lead teams that designed and implemented complex nationwide and worldwide networks. Provided turnkey solutions of networking hardware and software to solve complex client requirements.

ACCOMPLISHMENTS:

- Built a district office in Philadelphia for Centron: interviewed candidates, advised and managed sales and administrative personnel.
- Grew revenues from \$2M to \$10M and then to \$15M annually.
- Exceeded all sales objectives three consecutive years.
- Ranked among the top three producers in the firm.
- Received the 1996 Million Dollar Club Eagle Award

AUGUST 1991 TO MAY 1995

**Merit Systems**

POSITION: President and Independent Information Technology Financial Consultant

RESPONSIBILITIES: Consulted on lease design, residual forecasting, financial analysis, and contract negotiation for both lessee and lessor clients. Guest lecturer at lease training courses. Led a sales force automation project, focusing on productivity. Advised client

executive management on competitive strategies. Created sales productivity tools: brochures, newsletters, marketing materials, and executive presentations. Developed product strategies, wrote business plans, created sales commission compensation plans for various companies.

ACCOMPLISHMENTS:

- Elected to the Board of Directors of a client.
- Work has been published in Computerworld and Bank Automation News.
- Developed training programs.
- Guest motivational speaker.

JANUARY 1989 TO JULY 1991

**IBM Credit Corporation**

POSITION: Financial Marketing Advisor and Leasing Representative, West Orange, NJ

RESPONSIBILITIES: Consulted and advised over 200 IBM field sales personnel and 1,000 customers in northern New Jersey, on information technology financial acquisition strategies and promoted leasing from IBM Credit Corporation. Negotiated lease rates and contractual terms and conditions and worked with customers' accountants and attorneys on complex leasing transactions. Explained and resolved accounting, tax, and legal issues.

ACCOMPLISHMENTS:

- Designed customized leases for specific customer requirements. Wrote computer models to build step leases, perform IRS compliance tests, FASB 13 analysis, and produce the desired ROE for IBM Credit Corporation.
- Advised ICC executives as to market and product requirements.
- Piloted several new offerings for ICC.
- Grew revenues from \$42 M to \$88 M and \$119 M in 1989 and 1990, respectively; first half 1991 revenues exceeded \$90 M.
- Achieved two 100% clubs, averaging over 120% attainment above objectives.
- Ranked among the top ten financial advisors in the USA.

JANUARY 1987 TO DECEMBER 1988

**IBM Corporation**

POSITION: Manager of Business Planning, Mid-Atlantic Area headquarters, Philadelphia, PA

RESPONSIBILITIES: Developed strategic plans and sales programs, utilizing advanced statistical models, to align IBM with current market demands. Researched, surveyed and analyzed market conditions, as well as regional field personnel and IBM organization structure. Identified requirements, developed forecasting methods, recommended and presented plans and programs to address business needs.

ACCOMPLISHMENTS:

- Designed and implemented a business plan and methodology for reporting and tracking of revenue projections, expense and personnel resource requirements for \$1.6 billion area organization.
- Member of Advisory Committee for Revenue Forecasting and Tracking Methodology used across the country.
- Conducted quantitative statistical and financial analysis of major business problems

including: competitive strategies, product line positioning, and sales productivity improvements.

- Developed marketplace organization plan and advised executives on geographic area reorganization of branch offices to improve sales coverage of current client base, focusing on manpower planning and productivity.
- Promoted to IBM Credit Corporation.

AUGUST 1984 TO DECEMBER 1986

**IBM Corporation**

POSITION: Sales Manager, Finance and Insurance Branch Office, West Orange, NJ

RESPONSIBILITIES: Managed a sales team of six direct reports supporting a large multi-national insurance company generating in excess of \$40 million annually. Directed sales efforts of a 50 man national marketing team throughout the US, generating sales of over \$150 M. Interfaced with client executive management and IBM executives to design, develop and implement tactical and long range plans for the clients information technology requirements.

ACCOMPLISHMENTS:

- Achieved three 100% Clubs.
- Grew revenues 20% annually in a declining business environment.
- Sold IBM's first \$100 M mainframe volume purchase contract.
- Generated five Regional Manager Awards for team, rewarding competitive, financial, and long range planning accomplishments.
- Promoted to Manager of Business Planning.

JANUARY 1983 TO JULY 1984

**IBM Corporation**

POSITION: Regional Advisory Sales Representative, Mid-Atlantic Region headquarters, Philadelphia, PA

- RESPONSIBILITIES: Promoted to develop marketing programs for large mainframe and mid-range systems. Specialized in financial and competitive marketing strategies and became the leader of the competitive swat team. Advised over 200 IBM salespersons on financial and competitive strategies to win complex sales situations.

ACCOMPLISHMENTS:

- Received a Regional Manager's Award for competitive achievements.
- Selected to attend the IBM President's Class.
- Promoted to Large Account Sales Manager

JANUARY 1981 TO DECEMBER 1982

**IBM Corporation**

POSITION: Large Account Sales Representative

RESPONSIBILITIES: Sold intermediate and large computer systems to established large IBM customers in the greater Philadelphia area and worked with several multi-national accounts.

ACCOMPLISHMENTS:

- Attained annual sales quotas of \$5 M to \$10 M.

- Achieved two consecutive IBM 100% Clubs, averaging over 125% attainment of objectives each year.
- Received a Regional Manager Award and a Branch Manager Award.
- Promote to regional sales advisory staff.

JULY 1977 TO DECEMBER 1980

**IBM Corporation**

POSITION: Field New Account Sales Representative, Philadelphia, PA

RESPONSIBILITIES: Sold computer systems to new accounts in the greater Philadelphia area to first time IBM customers. Established client relationships, analyzed their information technology needs and proposed appropriate hardware and software solutions. Worked with small manufacturing firms and distribution companies.

ACCOMPLISHMENTS:

- Attained annual sales quotas of \$1.5 M to \$5 M.
- Achieved three consecutive IBM 100% Clubs, averaging over 110% attainment of objectives each year.
- Received two Regional Manager Awards and two Branch Manager Awards.
- Promoted to large account sales representative.

**PROFESSIONAL EDUCATION**

The Pennsylvania State University: Lean Six Sigma Certification

IBM: President’s Class

IBM: Manager Training

IBM: Sales Training

Situational Leadership® Certified Instructor

PAR Leadership and Teamwork, Certified Instructor

Amembal and Isom: Advanced Leasing

Communispond: Speaking on Paper

Karrass Organization: Effective Negotiating

Learning International: Conducting Professional Sales Negotiations

Holden Corporation: Power Based Selling

OnTarget, Inc.: Target Account Selling

StatGraphics, Inc.: Statistical Analysis of Data

Temple University: Statistical Methods of Stochastic Modeling

Montgomery County Community College: Italian language courses

Villanova University: Federal Income Taxation

H & R Block: Income Tax Preparation Course

**SOFTWARE SKILLS**

Adobe Acrobat Pro

Adobe Captivate

Adobe Connect



Adobe InDesign  
Adobe Photoshop  
Adobe Premier  
Articulate 360  
Canvas  
Finale  
GotoMeeting  
Lucidspark  
Magix Movie Edit Pro  
Microsoft Excel  
Microsoft Outlook  
Microsoft PowerPoint  
Microsoft Project  
Microsoft Teams  
Microsoft Word  
Moodle  
Steinberg's WaveLab  
Zoom

## **PUBLICATIONS**

### **Books**

- Juzbasich, J. (2019). Risk Identification Using the Premortem Technique. In D. Barrett & K. Soniat (Eds.), *The Keys to Our Success: A collection of tools, techniques, templates and concepts from 25 of our Best Project Managers*, 2nd Edition.
- Potosky, D. & Juzbasich, J. (2019). Chapter 24. Creating a measure of managerial mindsets to support research: An occupational culture perspective. In F. Chevalier, L. M. Cloutier, & N. Mitev (Eds.), *Research Methods for the DBA*. Caen, France: SARL In Quarto - Editions Management et Société (EMS).
- Juzbasich, J. (2015). Sowing the seeds of hope. In J. J. Sosik (Ed.), *Leading with character: Stories of valor and virtue and the principles they teach*, 2<sup>nd</sup> Ed. (pp. 264-265). Greenwich, CT: Information Age Publishing Inc.
- Potosky, D., Spaulding, J., & Juzbasich, J. (2013). Experiential learning as an outcome of meaning-making processes. In O. Kovbasyuk & P. Blessinger (Eds.), *Meaning-Centered Education: Perspectives and Explorations, Vol. 1*. New York: Routledge Publishing.
- Juzbasich, J. (2009). Applying full range leadership development in organizational and social development. In J. J. Sosik & Dongil (don) Jung, *Full Range Leadership Development: Pathways for People, Profit, and Planet* (pp. 69-70). New York: Taylor & Francis Group.

Juzbasich, J. (2009). Environmental, health, and safety application of full range leadership development. In J. J. Sosik & Dongil (don) Jung, *Full Range Leadership Development: Pathways for People, Profit, and Planet* (pp. 340-341). New York: Taylor & Francis Group.

Juzbasich, J. (2006). Sowing the seeds of hope. In J. J. Sosik (Ed.), *Leading with character: Stories of valor and virtue and the principles they teach* (pp. 217-218). Greenwich, CT: Information Age Publishing Inc.

Juzbasich, J. (1994). *Special report: Analysis of the IBM customer agreement* (1994). (Available from International Computer Negotiations, Inc., Drawer 2970, Winter Park, FL 32790-2970)

### **Refereed Journal Articles, Conference Proceedings and Presentations**

Potosky, D. & Juzbasich, J. (2015). Meaning-Centered Communication Orientation in Interpersonal Skills Training. Proceedings of the European Academy of Management, 2015 conference, Warsaw, Poland.

Sosik, J. J., Juzbasich, J., & Chun, J. U. (2011). Effects of moral reasoning and management level on ratings of charismatic leadership, in-role and extra-role performance of managers: A multi-source examination. *The Leadership Quarterly* 32, pp.434-450.

Juzbasich, J. & Sosik, J. J. (2008). Effects of gender composition of leader-follower dyads and leaders' level of moral development on charismatic leadership ratings. Proceedings of the Institute of Behavioral and Applied Management, 2008 conference, Orlando, FL. (BEST PAPER AWARD).

### **Conference Papers and Presentations**

Spaulding, J. & Juzbasich, J. (2012). *The emerging synthesis of dialogical pedagogy and cyberspace*. Meaning centered education panel discussion as a part of the Mini-Bakhtinian Conference in Education. Newark, DE, March 2012.

Juzbasich, J. (2011). *Simulation: A learning tool for today's project manager*. Poster board presentation as part of the 6th annual Biopharmaceutical Project Management Conference. (Finalist). Durham, North Carolina, March, 2011.

Juzbasich, J. (2006). *Inspirational moments in leadership development*. White board paper as a part of the Gallup Leadership Summit. Washington, DC, October 2006.

Juzbasich, J. & Saunders, D. M. (1995). *Dr. Demming's Theory of Profound Knowledge applied to the voice of the customer*. White board presentation as part of the annual American Society for Quality National Conference. (Blue Ribbon Award). San Antonio, Texas, Spring 1995.

## **Non-Refereed Journal Articles**

Juzbasich, J. (1994). Forgo fixed-term leases. Computerworld, July 11, 1994.

Juzbasich, J. (1994). Cost containment: How to negotiate with IBM on no-list mainframe pricing. Bank Automation News, February 23, 1994.

## **Video Productions**

Juzbasich, J. (Executive Producer and Director), & Wynne, P. D. (Producer and Writer). (2013). *HIPAA and HITECH: Pathway to compliance, a four part series* [Motion pictures]. (Available from Merit Systems LLC, 125 Strafford Avenue, Suite 222, Wayne, PA 19087.)

Juzbasich, J. (Executive Producer), & Mennies, M. (Producer, Director). (2011). *Hitachi Data Systems: Virtual storage platform installation training* [Motion picture]. (Available from Hitachi Data Systems Corporation, 750 Central Expressway, Santa Clara, CA 95050.)

Juzbasich, J. (Executive Producer), & Mennies, M. (Producer, Director). (2010). *HIPAA and HITECH for business associates* [Motion picture]. (Available from Merit Systems LLC, 125 Strafford Avenue, Suite 222, Wayne, PA 19087.)

Juzbasich, J. (Executive Producer), & Wentz, W. (Producer, Writer, Director). (2009). *Hitachi Data Systems: Universal storage platform VM DKC6151 installation training* [Motion picture]. (Available from Hitachi Data Systems Corporation, 750 Central Expressway, Santa Clara, CA 95050.)

Juzbasich, J. (Executive Producer), & Wentz, W. (Producer, Writer, Director). (2008). *Hitachi Data Systems: Universal storage platform V multi cabinet installation and upgrade training* [Motion picture]. (Available from Hitachi Data Systems Corporation, 750 Central Expressway, Santa Clara, CA 95050.)

Juzbasich, J. (Executive Producer), & Wentz, W. (Producer, Writer, Director). (2008). *Recognizing and reporting child abuse and child sexual abuse* [Motion picture]. (Available online from Merit Systems LLC, 125 Strafford Avenue, Suite 222, Wayne, PA 19087.)

## **MEDIA CITATIONS AND CONTACTS**

Story spotlighting John Juzbasich's leadership experiences. In J. J. Sosik & Dongil (don) Jung, *Full Range Leadership Development: Pathways for People, Profit, and Planet* (pp.1-2). New York: Taylor & Francis Group.

Column highlighting small business entrepreneurship and exporting, the 7th Congressional District Business Procurement Summit sponsored by Congressman Joe Sestak of Pennsylvania. *Small business can benefit from government resources*, [www.NewsOfDelawareCounty.com](http://www.NewsOfDelawareCounty.com) (March 27, 2009) Media, PA.

Story spotlighting John Juzbasich's leadership to help rebuild war-torn Liberia. *Leadership development*, [Penn State Outreach](#) (Spring, 2006).

Article on John Juzbasich's leadership and work in Liberia, Africa. *College student helps Liberia*, [The Daily Local News](#) (November 22, 2005) West Chester, PA.

Interviewed and quoted in *The question of price advantage*, [Bank Automation News](#) (April 20, 1994).

## **HONORS, AWARDS, AND ACHIEVEMENTS**

Golden Key International Honour Society  
Pi Lambda Theta International Honor Society  
Beta Gamma Sigma International Honor Society  
Honourary Paramount Chief of Lofa Gola Chiefdom, Klay District, Bomi County, Liberia  
Ten consecutive IBM 100% Clubs (annual sales achievement award)  
Micro Focus Quarterly Sales Leader Award, June 1999  
Centron Million Dollar Club Eagle Award for sales leadership

## **PROFESSIONAL LICENSES AND CERTIFICATIONS**

Certified Lean Six Sigma Practitioner by The Pennsylvania State University  
Certified Project Management Professional, PMP, by the Project Management Institute  
Certified Situational Leadership® Trainer  
Certified PAR Leadership and Teamwork Trainer  
United States Coast Guard U.S. Merchant Marine Officer License  
Federal Communication Commission Amateur Radio License, K3JUZ  
Chester County Pennsylvania ServSafe Certification  
Pennsylvania Insurance Agent License (expired)  
Pennsylvania Real Estate Agent License (expired)

## **CURRENT AND FUTURE RESEARCH INTERESTS**

Artificial Intelligence as applied to business applications  
Cultural History Activity Theory (CHAT)  
Meaning Centered Communication  
Adult Leadership Education  
eLearning  
Multi-National and Cross-cultural Instruction

## **PROFESSIONAL ASSOCIATIONS**

### **Currently**

Society for Advancement of Management (SAM) Editorial Review Board member  
University of Scranton Industrial Advisory Board member  
European Institute for Advanced Studies in Management  
Golden Key International Honour Society (Academic Excellence)  
Pi Lambda Theta International Honor Society and Professional Association in Education  
Beta Gamma Sigma International Honor Society (Business Excellence)  
Project Management Institute Keystone Chapter  
The Wharton Club of Philadelphia  
Penn State Alumni Association

### **Previously**

American Association for Adult and Continuing Education (AAACE)  
International Leadership Association (ILA)  
Society for Industrial and Organizational Psychology (SIOP)  
American Society for Training and Development (ASTD)  
Institute of Behavioral and Applied Management (IBAM)  
International Society for Performance Improvement (ISPI)  
Project Management Institute (PMI)  
American Society for Quality (ASQ)  
Amateur Radio Relay League (ARRL)

## **SEMINARS, COURSES AND WORKSHOPS TAUGHT**

PMP Exam Prep  
Financial Planning for Projects  
Advanced Project Management  
Leading Organizational Change  
Project Planning Foundations  
Project Management Leadership  
Transformational Leadership  
Full Range Leadership Development  
Project Management Foundations  
Innovation Fundamentals  
Leading Change and Innovation  
Make Better Decisions  
Emotional Intelligence  
Strategic Leadership  
Cross Cultural Studies  
Quantitative Decision Making  
Interpersonal Skills

Customer Conversations  
Leadership and Management for Non-Supervisors  
Introduction to Leadership and Team Building  
Building High Performance Teams  
Situational Leadership®  
Leadership and Management  
Quantitative Decision Making  
Sailing (for Main Line Sail & Power Squadron)  
Hitachi Cloud Architectural Design for Pre-Sales Professionals  
Powerful Workplace Writing  
First Class Facilitation  
Storage Economics: Determining the Value of Hitachi Data Systems Storage Solutions  
Storage Economics Blue Belt Master Class  
PAR Leadership and Teamwork  
Randori Negotiating: Winning Methods and Techniques  
Communication for Consultants  
Project Management Fundamentals  
Persuasive Presentations  
Advanced High-Tech Sales Training  
High Tech Procurement  
High Tech Leasing

### **Course Development**

PMP Exam Prep  
Leading Organizational Change  
Project Planning Foundations  
Advanced Project Management  
Project Management Leadership  
Critical Thinking and Decision Making  
Transformational Leadership  
Introduction to Leadership and Team Building  
Leadership for Non-Supervisors  
Interpersonal Communications  
Emotional Intelligence  
Customer Conversations  
Powerful Workplace Writing  
Storage Economics: Determining the Value of Hitachi Data Systems Storage Solutions  
Storage Economics Blue Belt Master Class  
Discovering the Economic Value of Hitachi Data System Products and Solutions  
First Class Facilitation  
Project Management Best Practices  
Project Management Fundamentals  
Communication for Consultants  
Persuasive Presentations

High Tech Procurement  
High Tech Leasing

**Speaking Engagements and Seminars Presented to Professional Groups:**

“Entrepreneur Roundtable”, Penn State Great Valley LaunchBox, Malvern, PA, February 18, 2021, (Invited Speaker).

“Artificial Intelligence”, The Philadelphia Contributionship 2019-2020 Corporate Conference, Philadelphia, PA, January 10, 2020, (Invited Keynote Speaker).

“Data Strategy Makes Way for Artificial Intelligence”, The Philadelphia Contributionship, Philadelphia, PA, November 20, 2019, (Invited Speaker).

“Global Intercultural Management”, The Pennsylvania State University, School of Graduate and Professional Studies, Malvern, PA, April 10, 2019, (Invited Speaker).

“Strategic Portfolio Planning”, Project Management Institute, Keystone Chapter, Northeast Branch, February 2019 Meeting, Moosic, PA, February 21, 2019, (Invited Speaker).

“Risk Management: The Pre-Mortem Technique”, Project Management Institute, Massachusetts Bay Chapter, Fall 2017 PMI MassBay Professional Development Day, Norwood, MA, September 23, 2017, (Invited Speaker).

“Mastering Critical Thinking for Effective Leadership”, International Institute of Business Analysis, NJ Chapter Meeting, Iselin, NJ, March 10, 2016, (Invited Speaker).

“Simulation as a Project Management Teaching Tool”, University of Scranton, Industrial Advisory Board Annual Meeting, Scranton, PA, October 30, 2015, (Invited Speaker).

“Make Better Decisions”, Project Management Institute, Keystone Chapter, Spring 2015 Lehigh Valley Spring Professional Development Day, Breinigsville, PA, March 28, 2015, (Invited Speaker).

“Making Project Management Training Memorable”, 2014 Project Management Institute Washington, DC Chapter Project Management Symposium, Washington, DC, September 26, 2014, (Invited Speaker).

“Your Brain on Training”, Devereux Foundation 2014 Learning Leaders Conference, Villanova, PA, September 24, 2014, (Invited Speaker).

“Leading in the Digital Age: Are You Connected for Success?”, The Pennsylvania State University Great Valley Campus, Malvern, PA, March 26, 2014, (Invited Panelist).

- “Make Training Stick”, American Society for Training and Development Philadelphia Chapter Meeting, King of Prussia, PA, March 12, 2014, (Invited Speaker).
- “Make Better Decisions”, Project Management Institute New York City Chapter Symposium, New York, NY, October 19, 2013, (Invited Speaker).
- “Cross Cultural Communication”, The Pennsylvania State University, School of Graduate and Professional Studies, Malvern, PA, October 7, 2013, (Invited Speaker).
- “Flex Your Leadership Style”, Project Management Institute Washington, D.C. Chapter meeting, Tysons Corner, MD, September 17, 2013, (Invited Speaker).
- “Simulation as an Adult Learning Tool”, Angry birds, happy employees: Using games in the workplace to cultivate collaboration and innovation, Igniting Innovation forum sponsored by the Chester County Economic Development Council, Malvern, PA, October 26, 2012, (Invited Speaker).
- “Cross Cultural Communication” International Institute of Business Analysis New Jersey Chapter meeting, Iselin, NJ, March 24, 2011, (Invited Speaker).
- “Team Building” U.S. Office of Personnel Management—Federal Investigative Services Division conference, Pittsburgh, PA, April 7, 2009, (Invited Speaker).
- “Transformational Leadership: Building High Performance Teams”, Project Summit Business Analyst World conference sponsored by the Project Management Institute and the International Institute of Business Analysis, Valley Forge, PA, April 27, 2009 (Invited Speaker).
- “Effects of Gender Composition of Leader-Follower Dyads and Leaders’ Level of Moral Development on Charismatic Leadership Ratings” Institute of Behavioral and Applied Management conference, Orlando, FL, October 3, 2008, (Invited Speaker).
- “Transformational Leadership: Constructing a Participative HSE Culture” St. Gobain International Executive Management conference sponsored by Saint-Gobain Corporation, Boston, MA, June 11, 2008, (Invited Speaker).
- “Constructing a Participative EHS Management System Through Transformational Leadership” Risk Management conference sponsored by Saint-Gobain Corporation, Indianapolis, IN, May 7, 2008, (Invited Speaker).
- “Transformational Leadership”, Project Summit Business Analyst World conference sponsored by the Project Management Institute and the International Institute of Business Analysis, Philadelphia, PA, April 29, 2008 (Invited Speaker).



“Leadership in Action: From Malvern to Monrovia to Kuwait”, Leadership In Action showcase sponsored by The Pennsylvania State University Great Valley Campus, Malvern, PA, April 16, 2008 (Invited Speaker).

“Success Story: Corporate Social Responsibility in Action”, Post-Conflict Africa: Open for Responsible Business conference sponsored by Students for Responsible Business, International Business Association, Francophone Student Professional Organization, & Division of Student Affairs, Temple University Main Campus, Philadelphia, PA, February 21, 2008 (Invited speaker).

“Full Range Leadership Development: Transformational Leadership In Action”, The Pennsylvania State University Great Valley Campus, Malvern, PA, November 26, 2007 (Invited Speaker).

“International Corporate Social Responsibility in Action”, Fox School of Business, Temple University Main Campus, Philadelphia, PA, October 11, 2007 (Invited speaker).

“Transformational Leadership”, Leadership Forum management meeting sponsored by Northwestern Human Services, Inc., Harrisburg, PA, May 18, 2007 (Invited Speaker).

“Leadership in Action: From Malvern to Monrovia”, Leadership In Action showcase sponsored by The Pennsylvania State University Great Valley Campus, Malvern, PA, April 24, 2007 (Invited Speaker).

“Meet the Exporter”, Fox School of Business, Temple University Main Campus, Philadelphia, PA, February 16, 2007 and November 10, 2006 (Invited speaker).

“Idea to International Business”, Breaking into the International Trade Game seminar sponsored by the US Dept. of Commerce Small Business Development Center, Temple University, Fort Washington Campus, Fort Washington, PA, October 24, 2006 (Invited speaker).

“International Business in Liberia, Africa”, Fox School of Business, Temple University Main Campus, Philadelphia, PA, April 7, 2006 (Invited speaker).

“My Path to Liberia, Africa” Ubuntu and the Spirit of Leadership forum sponsored by Penn State University, Great Valley Campus, Malvern, PA, November 21, 2005 (Invited speaker).

“Doing Business in Liberia” US Dept. of Commerce Small Business Development Center, Temple University Main Campus, Philadelphia, PA, October 18, 2005 (Invited speaker).

“Vehicle Financing: To Lease or Not to Lease?” Lions Club of Lansdale, PA, January 5, 1995 (Invited speaker).

“Sales Leadership” Storage Tech Corporation annual sales meeting, Boulder, CO, March, 1993 (Invited motivational speaker).

## **INTERNATIONAL EXPERIENCE**

Taught courses for Hitachi Data Systems Corporation (HDS) worldwide including India, Russia, South Korea, Sweden, Switzerland, Denmark, France, Austria, Germany, Italy, Netherlands, United Kingdom, and Australia

Lead a project management competition at the Singapore University of Technology and Design, in Singapore

Established and managed West Africa American Trading Company, Inc. in Liberia, Africa.

Speak, read and write Serbo-Croatian, Latin and Cyrillic alphabets; visited the area several times. Working knowledge of French.

Hosted an *AFS* exchange student from Italy, 1/1998 through 7/1998.

Hosted an *AFS* exchange student from Ecuador, 8/1996 through 7/1997.

Hosted two Russian adults from *American-Soviet Home Stays* for one week in March, 1994.

Traveled throughout Europe and North America.

Toured Japan, China, Hawaii, Jamaica, Cayman Islands, Canada, Australia, and New Zealand.

## **COMMUNITY SERVICE AND ORGANIZATIONS**

### **Currently**

Easttown Township, Chester County, Pennsylvania; 2021 Majority Inspector of Elections

Easttown Township, Chester County, Pennsylvania; 2020 Election Clerk

S. D. S. Q. (Socially Distanced Saxophone Quartet) musician and composer

America's Boating Club Valley Forge, formerly the Main Line Sail and Power Squadron, Past Commander

National Multiple Sclerosis Society 100 mile bicycle tour participant (four times)

Merion Concert Band (musician)

Chesapeake Bay Tartan Sailing Club

Chesapeake Bay Maritime Museum

### **Previously**

Chesapeake Bay Yacht Racing Association

Lower Merion Symphony (musician)

Maryland Yacht Club

Easttown Municipal Advisory Committee, Easttown Township, PA

The Union League of Philadelphia

Easttown Township Election Precinct Minority Inspector

Racial Justice Committee Co-Chair

A Better Chance: ABC House Board of Directors Member

Scoutmaster BSA Radnor, PA Troop 284

Church Music Committee Chair

BSA Sea Scout Master Ship 502

Leadership Development Committee

United States Coast Guard Auxiliary  
State Street Orchestra  
Chester County Concert Band  
The Upper Darby Sousa Band  
Easttown Municipal Waste Advisory Committee, Easttown Township, PA  
Leader of BSA Venture Crew 500  
Church Youth Group Advisor  
Conestoga High School Band Chaperone  
Georgetown Racing Fleet Sailing Club  
Bodkin Yacht Club

## **HOBBIES AND INTERESTS**

Music performance, composition, and recording  
Gardening  
Cooking  
Photography  
Sailing  
Fishing  
Bicycling and other outdoor activities

## **REFERENCES**

Denise Potosky, Ph.D.  
Professor of Management and Organization  
The Pennsylvania State University  
Great Valley School of Graduate Professional  
Studies  
30 East Swedesford Road  
Malvern, PA 19355  
[dxp16@psu.edu](mailto:dxp16@psu.edu)

Robin L. Hegvik, Ph.D.  
Behavioral Specialist and Psychotherapist  
4 Village Rock Lane, Suite 5  
Natick, MA 01760  
[robhegvik@gmail.com](mailto:robhegvik@gmail.com)

Albert T. Kulics, Ph.D.  
Department of Psychological Sciences  
Kent State University  
144 Kent Hall  
Kent, OH 44242  
[akulics@kent.edu](mailto:akulics@kent.edu)

John J. Sosik, Ph.D., CMA  
Distinguished Professor of Management and  
Organization  
The Pennsylvania State University  
Great Valley School of Graduate Professional  
Studies  
30 East Swedesford Road  
Malvern, PA 19355-1443  
[Jjs20@psu.edu](mailto:Jjs20@psu.edu)

Alo Ghosh, MBA-PhD (Wharton)  
Former Lecturer & Research Fellow, Wharton  
Former Asst. Professor, University of California  
Former Corporate Finance Expert, McKinsey, NYC  
Former Head of Sovereign Wealth Fund, PNG  
<https://www.linkedin.com/in/draloghosh/>  
[alo@aloghosh.com](mailto:alo@aloghosh.com)

Barrie E. Litzky, Ph.D.  
Associate Professor of Entrepreneurship  
Charles D. Close School of Entrepreneurship  
Drexel University  
3141 Chestnut Street  
Philadelphia, PA 19104  
[barrie.e.litzky@drexel.edu](mailto:barrie.e.litzky@drexel.edu)

Michael L. Ozimek, MBA  
Chief Executive Officer  
Horseware.com  
Kinston, NC  
[ozimekml@gmail.com](mailto:ozimekml@gmail.com)