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A CENTER FOR TRAINING AND DEVELOPMENT

A Project
Presented to the
Faculty of
California State University,
San Bernardino

In Partial Fulfillment
of the Requirement for the Degree
Master of Arts
in
Interdisciplinary Studies

by
Mendy L. Warman

March 1995

A CENTER FOR TRAINING AND DEVELOPMENT

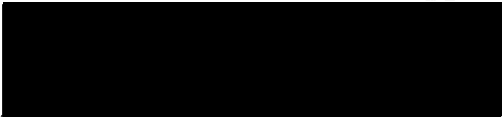
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March 1995

Approved by:



Dr. Lee Porter, Chair, School of Education

01/03/95

Date



Dr. Keith Dolan, Advanced Studies



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ABSTRACT

The purpose of this project was to offer a comprehensive view of contract training today, and, in particular, California State University, San Bernardino's critical role in educating the workforce.

This project examined the contract training activities of a number of institutions of higher education around the country. Based upon the institutions' researched, a design proposal for a Center of Training and Development on the campus of California State University, San Bernardino and housed in the Office of Extended Education was developed. The project concluded with program recommendations for the center.

A review of the literature provided background information on the current status of training needs for business, industry, and government organizations. In addition, a project completed by Donna Boyd (1994), solidified the necessity for local training and the kinds of training needed.

Data for the study were collected via a questionnaire of 15 institutions that have been successful in establishing and maintaining substantial contract training activities with a variety of organizations.

Conclusions indicated that of primary importance is the center's ability to be flexible and creative as well as to deliver the highest quality product. The Center for Training

and Development should begin immediately to meet the needs of business, industry, and government agencies.

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CHAPTER I: INTRODUCTION

Corporate America is placing more and more emphasis on training and consequently, allocating more resources to help educate and train the workforce. According to *Business Week* estimates, as many as 30 million current workers will have to be retrained between 1990 and 2,001 (Andrews, 1993). The American Society for Training and Development reports that employers currently spend almost \$30 billion each year for formal training and that number may double in the mid 1990's (Dole, 1990). According to Anthony Carnevale (1993), chief economist for the American Society for Training and Development (ASTD), "Workplace training is [already] roughly equivalent in size to the entire elementary, secondary, and higher education systems" (p.10). Corporate leaders such as David Kearns, the chairman of the Xerox Corporation, support worker education and training by calling education "a bigger factor in productivity growth than increased capital, economies of scale, or better allocation of resources" (Galagan, 1990, p. 43).

How are institutions of higher education responding to the tremendous training needs of business and industry? How can colleges carve out a role for themselves in this arena, given the many suppliers of training both inside and

outside of the workplace? This paper will look at ways in which colleges are entering into contractual agreements to provide educational services for organizations in the public and private sectors. Results from a graduate project completed by Donna Boyd (1994), showed that employers, for the most part, are very interested in obtaining services from their nearby colleges and institutions of higher education.

There is a growing number of colleges around the country that have been successful in developing effective training programs for organizations and delivering, under contract, credit and noncredit courses at business sites, on campus, or both. The purpose of the first part of this project is to examine the current state of the art as exemplified by a small group of postsecondary institutions engaged in training by contract. According to the College Board (1989), contract-training refers to

an arrangement in which an organization, whether a business, government agency, or voluntary association, contracts directly with a college or university for the provision of instruction to its employees, its clients, or its members (p.1).

In the past, the literature showed that educational institutions delivered existing courses or programs under contract on campus, or at other locations, to a select clientele specified by the client, usually for the purpose of improving job performance. The training was employee

specific or job specific, and had a positive impact on the worker's security in a particular job or with a particular employer.

Unlike contract education and training delivered in the past, contemporary training by contract is now "frequently customized to meet the employer's specifications, blending state-of-the-art knowledge with on-the-job needs" (McBride, 1993, p.4). It can focus on personal and professional skill development for the benefit of employees and employers. Today, contract training constitutes a major factor in the nation's effort to cope with the demands of the postindustrial society.

Chapter II of this project examines a select group of 15 colleges and universities that have been successful in establishing and maintaining substantial contract training activities with a variety of organizations. Based on these models, Chapter III will be a design proposal for a Center for Training and Development (CTD) on the campus of California State University, San Bernardino (CSUSB). Chapter IV of this project will consist of program development recommendations for the center. The purpose of this project is to offer a comprehensive view of contract training today--its complexity, its sophistication, its diversity, and, in particular, California State University, San Bernardino's critical role in educating the workforce.

**CHAPTER II:
A LOOK AT UNIVERSITY-BASED
CONTRACT-TRAINING MODELS**

Introduction

This chapter examines a select group of 15 colleges and universities that have been successful in establishing and maintaining substantial contract-training activities with a variety of organizations. Although not a random sample, the respondents represent a range of institutional types and geographic locations: 6 public two-year institutions and 9 four-year colleges and universities (7 public and 2 private). In selecting these particular institutions for the study, approximately 60 colleges were researched and/or contacted by telephone. Based on criteria for quality contract-training programs suggested by The College Board (1989), each institution selected for further consideration had staff committed to developing contracts, prepared at least 10 to 20 contracts a year, demonstrated flexibility in a range of contract offerings, and showed progress and institutional commitment toward an established contract-training effort (McBride, 1993).

The study scrutinizes the following facets of contract training: institutional history, administrative structure and staffing, marketing, clientele, faculty, programs, program delivery, and strengths of each program based on 1993-94 operations. Some background information was found

in the literature; however, for the most part, participating respondents, usually the contracting administrator, provided historical/background information by mail, which was followed up by one telephone interview.

Sampling Technique

It should be noted that collection of primary data for this study was confined to survey responses of a purposeful sampling of respondents representing a range of institutional types and geographic locations: 6 public two-year institutions and 9 four-year colleges and universities (7 public and 2 private). Each institution purposefully showed evidence of an established contract-training effort. The intent of using purposeful sampling was to obtain a small sample of information-rich cases of college- and university-based contract-training programs.

Definitions of Terms

For the sake of convenience and in order to minimize misunderstanding, it is appropriate to define a few key words and phrases used throughout the text of the study and in the research instrument.

Center for Training and Development (CTD) is the specific name to be given to the office that administers contract-training within the division of Extended Education at CSUSB.

Centralized administration is a structure in which one office is responsible for the institution-wide contract-training effort.

Clients can be organizations/employers interested in receiving training for their employees.

Contract training is an arrangement in which an organization, whether a business, government agency, or voluntary association, contracts directly with a college or university for the provision of instruction to its employees, its clients, or its members.

Course and program are often interpreted differently and yet used interchangeably. For purposes of this project, course means a defined curriculum usually dealing with one issue or subject. A course may be taught in different time frames such as one hour, one day, or over a period of days, weeks or months.

CSUSB represents California State University, San Bernardino, whereas **CSU** refers to the entire California State University system.

Decentralized administration is a structure in which the contract-training effort is conducted by a variety of programs, academic schools, and departments of an institution.

Evaluation is a process of measuring discrete elements or the overall success of courses including such elements as participant satisfaction, benefits, results or outcomes, and impact.

Extended Education (OEE) is the specific name of the continuing education division at CSUSB.

External consultants are instructors from outside the university setting who are sought after to teach courses. They have no current contractual teaching association with any institution of higher education.

Full-time faculty are instructors who teach on a full-time basis for an institution of higher education.

Part-time adjunct faculty are instructors who teach on a part-time contractual basis for an institution of higher education.

Needs assessment is an organized and planned process of identifying educational needs.

Program (see "course" listed above) is viewed as an umbrella term covering a series of courses.

Provider is the organization responsible for the design and/or delivery of an education course or program.

Self-supporting functions without funds from the institution (the state).

State-supported receives institutional state funds to support programs.

Trainee is an individual/employee participating in an activity that has been planned to aid the individual in acquiring knowledge, skills, or attitudes.

Training is a planned learning experience whereby individuals learn to perform specific skills.

Participating Institutions

Two-year institutions

Austin Community College, Austin, Texas
Mott Community College, Flint, Michigan
Rio Salado Community College, Phoenix, Arizona
Seattle Central Community College, Seattle, Washington
South Seattle Community College, Seattle, Washington
Westmoreland County Community College, Youngwood,
Pennsylvania

Four-year, public institutions

State University of New York, Albany, New York
University of Arkansas, Little Rock, Arkansas
University of Delaware, Newark, Delaware
University of Georgia, Athens, Georgia
University of New Hampshire, Durham, New Hampshire
University System of New Hampshire School of Lifelong
Learning, Portsmouth, New Hampshire
University of North Texas, Denton, Texas

Four-year, private institutions

American University, Washington, D.C.
Pace University, New York, New York

History

The development of contract-training programs at the institutions researched appears to fall into two distinct categories. One group of programs developed and continues to function as an outgrowth of continuing education units. The programs of the second group developed on their own, independent of any existing continuing education units. Many of the programs in this second group seem to focus on specialized training, for example, in the field of management, and are the result of growing contract-training requests from the business community.

In conducting the research and questionnaire, the institutions were asked how long each had been involved in contract training, how and by whom the effort was initiated, whose approval was needed, what start-up costs were associated with the effort, and what obstacles, if any, had to be overcome.

Group one: contract-training offices based in continuing education units. Some of the historical aspects of this first group were examined. Three of the programs researched, State University of New York At Albany, American University, and Austin Community College grew out of continuing education units, however today are

independent. The remaining six programs which originally grew out of continuing education units still function within a continuing education office, either with a completely separate staff devoted only to contract-training programs, or with the work shared by the existing staff in the continuing education office.

The educational institutions in this first group have been involved in contract-training programs for between twelve and twenty-eight years. The programs were usually initiated in response to demands from businesses and agencies within the community. Often the dean or director of continuing education sought approval from the appropriate department within the institution to increase the capability of the unit to handle requests for contract-training. In some cases, no start-up costs were necessary if staff restructuring was all that was needed in the beginning stages. There were no additional overhead costs because office space was shared. In most instances, presidents, deans, provosts, or other high-level administrators gave their approval to these programs that have brought substantial profits and visibility to their institutions.

The University of Delaware has a substantial contract-training effort administered by the director of noncredit programs, Division of Continuing Education. It has had

over 27 years of contract-training experience, originally begun through outreach efforts of the division to meet a request for military training. Today it serves a wide range of corporate and government clients. There are 20 staff members, none of whom devote more than half-time to contract-training.

American University, Washington, D.C., which serves 14,000 students, initiated its contract-training effort in 1977 within the Continuing Education unit and six years later separated these programs by developing the Office of Contract Programs as its own unit. There are nine staff members, six of whom are full-time.

What obstacles had to be overcome? Although some institutions felt that no obstacles existed, others reported a few recurring themes. One repeated complaint was territorialism. Competition within the institution and disputes over program ownership remain ongoing problems for some contract-training programs. Another response had to do with establishing a reputation with the business community, i.e. "rapport with and respect from industry's top management." And a third common answer dealt with lack of cooperation from academic units, and a lack of faculty experienced in training--which meant slow response to initial requests for contract programs.

Group two: independent contract-training offices.

The second group of institutions has been involved in contract-training for from twelve to twenty-eight years. All six institutions have rather diverse histories. A noticeable difference in the second group shows up in the start-up costs associated with initiating the contract-training effort. In the first group, all but a few institutions reported that no start-up costs were required. Most programs that did receive an initial budget for new positions in the first group were those setting up offices independent of the original continuing education units. But in the second group, most required start-up costs ranging from \$10,000 to \$60,000, depending on how long ago the effort was initiated and how many positions were requested. As for how the contract-training effort was initiated, and by whom, most of the programs in this group were initiated by top administrators at the institution. There seemed to be an interested faculty member, dean, or president who said, "Let's create a separate office to handle the needs of business and industry." Clearly this commitment from senior administrators provided tremendous support for a new effort on campus.

What obstacles had to be overcome in the initial phases of these programs? Here, too, some institutions said there were none. Aside from those, the most frequent response mentioned was the issue of territorialism within

the institution. Some institutions felt that lack of funding was a primary obstacle (especially at state-funded schools). A few mentioned the need for flexibility of course content, scheduling, and faculty salaries.

All the programs researched and questioned survived their beginnings. Some continue to deal with the same problems they faced at inception, but most have found ways to overcome them. However, those programs that began with strong institutional support, whether as part of a continuing education unit or as an independent unit, were in general more successful.

Administrative Structure

Organizational structure. The first question in this section that was asked of the institutions concerned the manner in which contract-training efforts were administered at their institutions. Centralized administration meant that contracting was directed by a single office, and decentralized administration meant that contract-training was conducted by a variety of departments or administrative units (Fey, 1989). A little more than half of the institutions responded that they had a centralized effort (8 out of 15). A centralized administration was more prevalent in two-year institutions, while a decentralized administration was dominant in four-year institutions,

although both four-year private institutions have centralized administrations.

Centralized versus decentralized administration did not seem to depend on whether contract-training programs were organized within a continuing education unit (or originated in one), or whether they functioned as an independent unit designed solely for contract-training purposes. Within both the centralized group and the decentralized group, there were close to even numbers (8 centralized and 7 decentralized) of continuing education units and administrative or academic units.

There was tremendous disparity in the organizational structure of the contract-training programs that were examined. A few examples might help explain the differences between centralized and decentralized efforts. An example of a centralized administration is the Office of Corporate Programs at Pace University. Although this is a four-year private institution, all contracts with business, government, and industry, are handled through this office under a centralized mandate from the president of the institution. Requests are processed, contracts are written, instructors are hired, and training is implemented and evaluated all under the direction of one full-time director whose sole purpose is to administer contract-training programs. This director works with the

appropriate academic units to confirm faculty and academic content, and program ownership is often shared.

How do the decentralized efforts look in comparison? The University of New Hampshire in Durham has a major contract-training effort administered in the Division of Continuing Education. Several other units of the university also conduct contract-training. The Whittimore School of Business often handles its own contracts; the College of Engineering also functions independently. Because of territorial issues, the president established a campus Ad Hoc Corporate Development Committee, which meets eight or ten times a year to establish coordination. This provides an arena for the schools to work together, sometimes producing joint proposals.

Finally, the University of Arkansas at Little Rock provides another look at the organizational issues of contract-training programs. Many units on campus, including the Division of Management Services, contract with corporations for specialized training. A few years ago, the Division of Management Services was determined to put forth a serious contract-training effort. As a result of a strategic planning session, a new approach was initiated: the effort of the Division of Management Services was reorganized by product line rather than by delivery systems. The belief was that the only difference

between public and corporate programs was the increased tailoring of courses for contract programs. The staff stayed constant, but the effort for contract-training was spread among more people and divided by course content under two program specialists. In addition, a full-time sales consultant was hired to contact companies personally. Based on the information he gathered, programs were developed. In the first three months, the sales consultant arranged 50 contracts, compared to an average of 10 contracts every three months. The organizational changes were made for a number of reasons: "to better specialize in content and to improve service to industry; to improve corporate communication by having the same internal structure as most of the companies they deal with; and to have more consistent involvement with instructors" (McBride, 1993, p.32).

How contract-training programs are administered at the institution seem to be heavily influenced by (1) the overall organizational structure of the institution; (2) the philosophy of the leaders of the institution with respect to contract-training (centralized versus decentralized effort); and (3) the type of training offered based on community needs and institutional capabilities (specialized programs versus generic offerings). Creation of an administrative structure that capitalizes on the

three factors could help to minimize some of the inefficiencies of program administration felt by some of the institutions researched (e.g. bureaucratic problems).

Territorial conflicts. Institutions were asked how they could avoid conflicts with other units on campus that are providing, or may want to provide, training directly. Although two institutions said they had no problems in this area, the other responses were fairly consistent. The most frequent answer, from 10 out of 15 institutions, was that good communication with other units could prevent conflict. A number of institutions suggested that individual contact with faculty and key figures in academic and administrative departments could also help. The need for communication was the same for those with centralized administration of contracts (five responses) and those with decentralized administration (five responses), a strategy apparently important to most successful contract-training efforts.

The second frequent response to this question was that institutional guidelines or mandates were established from the top levels of administration. According to Stockholm and Lewis (1990), "if contract-training programs were part of an institutional mission, then gradually all the units on campus functioned according to those directives" (p.7). This overall response was much more prevalent in the programs administered centrally (eight responses) than in

the decentralized programs (two responses). Obviously a centralized approach requires support from above.

Facilities. What facilities did the contract-training programs have at their disposal? Did they have their own offices, building, on-campus conference facility, classroom and meeting space controlled by their office, and/or sleeping rooms for participants? Most of the programs had their own office space (80 percent), with a noticeable distinction between those that were centralized (90 percent) compared to those that were decentralized (70 percent). It appears that the decentralized programs more often shared office space with another unit, such as continuing education. The centralized programs also had a higher incidence of having a separate building for their offices and training programs: 65 percent for centralized programs compared with 15 percent for decentralized programs. Fifty percent of both centralized and decentralized programs reported having a conference facility; 65 percent of all programs had classroom and meeting space under their control; and 30 percent had sleeping rooms available for participants, sometimes only when regular campus programs were not in session.

Self-supporting. To what extent are contract-training programs self-supporting? Institutions were asked whether their offices can and do function without additional

revenues from the institution (self-supporting), receive some support, or are totally state supported. Here again there is a difference between centralized and decentralized approaches to contract-training efforts. All of the centralized programs were self-supporting, and in addition, often provided profits to general institutional funds. On the other hand, only two out of seven decentralized programs were able to support their own efforts. It was impossible for two other such programs to separate contract-training from other public continuing education programs. Three decentralized contract-training programs were subsidized at 50 or 60 percent of administrative costs.

Administrative Staff

How was the contract-training effort organized in terms of personnel at each of the institutions researched? Over three quarters of the institutions questioned (13 out of 15) had some full-time staff positions serving only contract-training efforts. But there was very little consistency within this group. The number of full-time positions ranged from one to nine. Only two programs out of 13 functioned strictly with full-time staff, while the rest had a combination of full-time staff with some who were part-time or sharing time with other continuing educa-

tion efforts. The other two institutions administered programs with no full-time staff positions assigned solely for contract-training.

All the programs surveyed staff similar types of positions, often referred to by different names. There was in all cases either a director, an executive director, a dean, an associate dean, or a coordinator serving as leader. There were also marketing specialists, all of whom sold contracts. Sometimes the marketing of programs was included in the job description of a third category, the program specialist. Clerical/support staff were also utilized but were usually in short supply.

Were there any factors that determined which institutions used staff members strictly for contract-training efforts? Community colleges versus four-year institutions did not seem to be an issue; both types of institutions were evenly divided. Nor did it make a difference whether the contract-training effort within the overall institution had a centralized or decentralized structure.

What does appear to be a factor in the assignment of staff is volume of contracts per year (gross annual revenue). Of the two institutions that functioned with only part-time staff, neither generated more than \$500,000 in gross revenue. In the group of 13 institutions with

full-time staffing, ten had revenues exceeding well over \$1 million, and three of those had gross revenues of over \$5 million. As expected, the institutions with larger annual revenues from contract-training had more staff members. It would seem that in order to conduct a large-scale contract-training effort, staff positions, preferably full-time, must be allocated and supported by the department and the institution.

Marketing

This section looks at competition and marketing approaches most often utilized; whether there is a marketing plan and/or budget for the contract-training effort; and what market research, if any, the institutions conduct. Marketing can be carried out by marketing specialists, program specialists, or by program directors. Only three institutions claim to have one or more full-time staff member(s) whose sole responsibility is to market their programs. Six institutions have part-time staff members assigned to marketing their programs; two others make use of marketing specialists assigned to other continuing education programs.

Competition. Who are the chief sources of competition for contract-training programs in universities and colleges? Sixty percent of the institutions said other

colleges and universities; 50 percent said private consultants; 44 percent said training vendors; 26 percent said in-house corporate or government training programs; and 15 percent said faculty within the institution, marketing themselves. Institutions did not site corporate education programs provided by the corporations themselves as a major problem. Several institutions noted that although either an abundance of competition or a lack of it will affect the marketing effort, the ability to define a programming niche can focus the marketing effort and, thereby, avoid competition.

How do institutions find out what their competition is? Almost every institution agreed on this one: "Do your homework." Also mentioned was word-of-mouth or talking to people you know. All respondents mentioned talking to other professionals at institutions in the training field; professional networking (advisory committees, professional associations); and talking to instructors and other training organizations. Seventy-five percent of the institutions mentioned talking to past and prospective clients. Some programs suggested keeping an eye on publicity used by others.

Marketing Plan. When asked if the contract-training effort had its own marketing plan, 9 of 15 responded yes. Two of the six others said they shared the marketing plan

with the larger continuing education department.

Most of the marketing plans were straightforward: to meet income-based goals; to increase visibility in the business community; to target particular clients; or, to have a certain mix of programs. The University of North Texas said they target past customers, alumni, and supporters, training directors of corporations, and educational directors of state associations. At the University of Arkansas at Little Rock, the Division of Management Services is housed in the state chamber of commerce offices in downtown Little Rock. Their marketing effort is done by the Arkansas State Chamber of Commerce, and over 100 local chambers of commerce.

Not all the programs with marketing plans have marketing budgets. Ten institutions have money budgeted for marketing; three do not; and the remaining two have funds available to them through continuing education budget allocations. There is no consistency in the size of the budgets. Some get a percent of the total budget figure (from eight to 14 percent); some allocate just advertising costs (from \$5,000 to \$10,000); and others include salaries. Differences in the cost of advertising and competition in beginning programs versus established ones influence the amount of money needed to promote contract-training programs.

Market analysis. Do those responsible for contract-training programs attempt to analyze their markets? Six institutions said no market analysis is conducted at all. The other 9 institutions conduct internal market analysis, mostly on an informal basis in their own offices or through the larger continuing education department.

Marketing potential clients. What do contract-training programs do to market to potential clients? Nine institutions said direct mail (on the average of three to four per year) is a significant portion of their plan. Eight responded that they make personal sales calls every week. Next came professional networking and media releases/advertising mentioned by six institutions each. Three make telephone sales calls, on the average of 10 to 15 per week; only companies that have been carefully researched and screened are called. Only two institutions used invitations to campus events as a marketing tool.

For the contacts that were initiated, how were decisions made as to which organizations to approach? Two strategies were evident. One was based on the size of the organization. The other approach was to research the company and find out its goals, its commitment to training, whether it is a growing concern, whether it is a "hot" industry in the region, and whether its needs match the expertise of the college or university. Contract-training

programs tend to use directories, publications containing business information, "top" company lists, chambers of commerce, and other sources of this kind for this information.

Marketing effectiveness. Institutions were asked what percentage of their overall effort resulted in a signed contract over a period of one year. Four of the fifteen institutions said they could not estimate. The other eleven averaged 30 percent resulting in signed contracts. It is impossible to evaluate how effective the marketing efforts are in the contract-training programs questioned because those who run the programs were unable to make an assessment. Some institutions conduct very little marketing, but because the programs are specialized and there is a high demand for them, many contracts are written per year and revenues are high. Other programs with solid marketing efforts do not have the same turnaround in numbers of contracts or revenues received (Harris, 1989).

The Clients

Among the 15 institutions researched and questioned, great differences were found in the way contract-training was directed. Those differences include the annual number of contracts, the amount of annual revenue generated, initiation and negotiation of contracts, the size and type

of organizations served, assessing client satisfaction, and the kinds of trainees served. This section will address those differences.

Amount of contracts and revenue. The 15 institutions negotiated over 2,400 contracts in 1993-94; 1,700 contracts were negotiated by one institution. Sixty percent of the institutions wrote fewer than fifty contracts each. The amount of revenue generated seemed to bear no consistent relationship to the number of contracts written. Gross annual revenue from contracts among the institutions ranged from \$150,000 to \$15 million, with the median annual revenue at \$1.6 million, and the mean at just over \$2.6 million.

Of the 6 two-year colleges, two wrote more than 100 contracts each, all of which were small, averaging approximately \$25,000 each. Rio Salado Community College averages 60 contracts annually, grossing \$5 million. Two negotiated 60-80 contracts and had gross average revenues of \$1.5 million each. Westmoreland County Community College in Pennsylvania, negotiated fewer than 30 contracts, had gross revenues of \$100,000, and brought in an mean of \$3,846 per contract.

In contrast, with the exception of the University of North Texas at Denton, which negotiated 1,700 contracts, the remaining 8 four-year institutions had markedly fewer

contracts per institution (median: 40), but their contracts were larger (median: \$92,000) and their gross revenues were higher (mean: \$2,980,000 compared with the two-year colleges of \$2,440,000). The two private institutions wrote fewer contracts than the public institutions, but the mean value was about the same.

Type and size of organization being served. Among all 15 of the institutions surveyed, nearly 63 percent of contract-training was conducted with business and industry, about 32 percent with government agencies (local, state, or federal), 3 percent with international groups, and 2 percent with voluntary associations. Eleven of the institutions did not contract with voluntary associations; two did not contract with government agencies; and one did not contract with business and industry.

More institutions provided services to at least two types of client, although half of them did 70 percent or more of their training with business and industry and less than 30 percent with government agencies. The data reflected that contract-training was heavily oriented toward business and industry; fewer training programs were conducted with government agencies. There were no marked differences between the various institutions as to the type of client served.

Within the group of institutions surveyed, 20 percent

of the training was done with small organizations (fewer than 100 employees), 35 percent with medium-size organizations (100 to 500 employees), and 45 percent with large organizations (more than 500 employees). Some did over 85 percent of their training with small organizations while others did over 90 percent with large organizations. Fifty percent of the institutions conducted less than 15 percent of their training with small organizations; less than 23 percent with medium-size organizations; and more than 40 percent with large organizations. The size of the client organizations appeared to be related to location as well as to college mission; some institutions did not have access to large organizations within their market area, while others with broader access apparently selected one or more market segments, probably influenced by their capabilities and their competition.

In general, the four-year institutions provided less training for small and medium-size organizations and more for large organizations than did the two-year institutions. Otherwise, differences among institutional types in this area were minimal.

Contacts and decision-makers. When educational institutions sought training contracts, who was contacted at the client organizations? Who in the client group made the decision to establish a training contract? Who was

involved in executing the contracts? And, among the signed contracts, who initiated them--the clients or the providers? The answers were strongly influenced by the size and type of the client organization served.

Some of the respondents noted that in soliciting small business contracts, they went directly to the chief executive officer, who was often also the owner of the business. But in large organizations the contact was most often made with the training or personnel director. The answers in this survey were undoubtedly skewed toward the larger organizations which constituted the major clients or most respondents.

The decision to undertake a training program was most likely made by the chief executive officer (30 percent), although division or plant managers, training directors, and personnel or human resource directors often had that authority. The contact to seek training was often initiated by the client; in some institutions, 90 percent of the successful contacts were initiated by the clients, while in others, only 5 percent were initiated by the client. Half of the institutions surveyed reported that 50 percent or more of their contracts were client initiated, although one quarter of the institutions initiated 75 percent or more of their contracts.

Evaluation. All respondents reported making some

effort to assess client satisfaction with the training program. Procedures included evaluations by participants and clients, follow-up interviews with clients, client repetition, and assessment of trainee change (e.g., pre- and post-tests). Three respondents used two assessment devices, four used three, and about five used only one evaluation procedure. Ninety percent of these institutions used participant evaluation, and several of them had participants complete both mid-course and course-end evaluations. Over 50 percent conducted client interviews when the program was completed. More than 25 percent engaged in a more formal evaluation that involved the client, such as interviews and follow-up calls. Formal assessment of trainee change, through pre- and post-testing, was mentioned only rarely.

Several campuses cited repeat clients as a way of assessing satisfaction with the program, but always in combination with at least one other evaluation procedure. Data on repeat clients were available for all of those surveyed: on the average, nearly two-thirds of the contract-training reported was with prior clients. The two-year institutions were more likely to do repeat business than were the four-year institutions. Fifty percent of the two-year institutions conducted 75 percent or more of their contracts with repeat clients; four-year

institutions conducted 60 percent of their contracts with repeat clients.

The amount of repeat business undoubtedly influences the marketing strategies. However, repetition alone is not clear evidence of client satisfaction; the provider may be the only place in town where training is available, and the client will continue to use that provider, even when faced with mediocre programs, until other affordable options become available (McBride, 1993).

Table I: Percentage of Respondents, by Institutional Type, Serving Eight Categories of Trainee

	All	Two-year Institu.	Four-year Institu.	Four-year Public	Four-year Private
Senior/upper-level mgmt.	33%	16%	44%	42%	100%
Middle Mgmt.	80%	66%	77%	57%	100%
Technical and prof. wkrs.	53%	66%	44%	42%	5%
First-line supervisors	53%	33%	55%	57%	100%
Sales and mktg. pers.	0%	0%	0%	0%	0%
Secretarial/clerical	6%	16%	0%	0%	0%
Operators and crafts wkrs.	33%	83%	0%	0%	0%

Trainees. Universities were asked to distribute the trainees served into eight categories: senior or upper-level management, middle management, technical and professional workers, first-line supervisors, sales and marketing personnel, secretarial and clerical personnel, operators, and crafts workers. As shown in Table I, training for middle management is the heavy favorite, with 80 percent of the institutions offering programs for them. This category persisted as a priority across institutional types. Technical and professional workers were served by over 53 percent of the institutions, as were first-line supervisors. Except for middle management, technical and professional workers, and first-line supervisors, there was a noticeable difference between those trainees served by two-year institutions and those served by four-year institutions.

In general, the two-year institutions served a more diversified group of trainees and had more programs than did the four-year institutions. The two-year institutions served all groups but one, the sales and marketing personnel. The four-year universities served four groups: senior management, middle management, technical and professional workers, and first-line supervisors. The four-year private institutions were somewhat more focused, concentrating on three categories: senior and upper-level

management, middle management, and first-line supervisors.

Generally, sales and marketing people and secretarial and clerical workers received the least attention. All of their training was provided only by two-year institutions.

Programs

This section examines the programs of the 15 institutions questioned. It covers both credit and noncredit programs; how much of each was undertaken and in what forms; how many programs were customized; and how client requests for contract-training were handled.

Credit and noncredit. On average, 70 percent of contract programs provided by the institutions were noncredit. Among the 9 four-year universities, only 18 percent of its contract-training programs were offered for credit. The two-year institutions provided both credit and noncredit programs, averaging 46 percent credit and 54 percent noncredit.

As shown in Table II, of the four-year private institutions, 65 percent were credit offerings and 35 percent noncredit programs, compared with the four-year public institutions which offered only 4 percent credit and 96 percent noncredit offerings.

Table II: Percentage of Respondents, by Institutional Type: Credit vs. Noncredit Programs

	All	Two-year	Four-year	Four-year Public	Four-year Private
Credit	29%	46%	18%	4%	65%
Noncredit	71%	54%	82%	96%	35%

Considering the differences between credit and noncredit contract training and the processing required for delivery, this heavy leaning toward noncredit contract-training makes sense. On the demand side, there appears to be less interest in credit instruction; degrees are far less important than the learning outcome expected from the training. Clients want quick responses with customized noncredit training to meet their needs, which colleges and universities can provide. To supply credit programs under those terms is usually more difficult because credit courses require more, and longer, internal processing.

Table III: Percentage of Respondents, by Institutional Type: Three Ways Contract-Training Programs Were Delivered

	All	Two-year	Four-year	Four-year Public	Four-year Private
Individual Courses	72%	75%	66%	72%	30%
Certificates	25%	23%	29%	28%	35%
Degree Courses	3%	2%	5%	0%	35%

Delivery. Institutions were asked about the ways in which contract-training programs were delivered. Offerings for credit and noncredit--individual courses, certificate programs, or degree programs--did not vary much by institutional type with the four-year private institutions having the most variety (see Table III). Seventy-two percent of all programs were individual courses, 25 percent were certificate programs, and degree programs made up only about 3 percent. Both the two-year institutions' and the four-year public institutions' offerings constituted approximately 73 percent of individual courses and 26 percent certificate programs. The four-year private institutions offered less than 30 percent individual courses, 35 percent in certificate programs, and 30 percent contract training in degree programs (a large increase over that of the two-year and four-year public institutions).

Customization. A large percentage of contract-training programs, on average about two-thirds, were customized for the client. The degree of customization, however, varied widely, ranging from modest adaptations of credit and noncredit courses that were already on the shelf, to major instructional designs to meet specific client needs.

Table IV: Percentage of Respondents, by Institutional Type: Customized vs. On-The-Shelf Courses

	All	Two-year	Four-year	Four-year Public	Four-year Private
Customized	76%	81%	74%	74%	75%
On-The-Shelf	24%	19%	26%	26%	25%

All the institutions said they customized their courses (see Table IV). Two-thirds of them customized 70 percent or more of their contract-training programs. The pattern varied little among institutional types, although there was a slight tendency for the two-year institutions to customize more than the four-year institutions. Three institutions, one of each type, customized all their contract-training programs and one institution customized as little as fifteen percent of its offerings. Three institutions used on-the-shelf courses for 50 percent or more of their contract programs. Customization was clearly provided by all of the institutions to their clients.

Institutional responsiveness. Much of the success of contract-training efforts depends on the responsiveness of the institution to requests for training. Methods used for processing client requests and the response time required, from requests to beginning of the training sessions, were looked at.

About 10 institutions, two-thirds of the respondents, described the process of meeting a client's request as beginning with a definition of the problem, assessment of the need, and possibly an on-site visit. The other 5 institutions described procedures that seemed to assume the need was well enough defined and thus were able to respond to it directly. But the 10 institutions used a series of steps that The College Board (1989) refers to as the response process:

1. Visit the worksite.
2. Analyze or define the problem, or conduct needs assessment.
3. Review the institution's capability to respond.
4. Evaluate trainee experience and background.
5. With participation of instructor, client, and trainees, set objectives and design course or program to address the problem; or define objectives, design the course or program, and meet with management and labor to agree on final outline.
6. Present final proposal, negotiate terms, reach agreement.
7. Develop instructional plan and training materials.
8. Deliver training.
9. Conduct program evaluation.

The programs are the heart of contract-training; the "ability to meet the client needs through customization

and rapid response often determine their success. If demands can be met at a high level of quality and a competitive price, success is assured" (The College Board, 1989, p. 28). The questionnaire seemed to demonstrate that there are many ways to respond effectively, and each contract-training program will have to identify a creative match between its own institution's capabilities and constraints and the needs and demands of their clients.

The Faculty

Who were the instructors for contract programs? To what extent did they differ from the institution's regular faculty?

Two-thirds of the institutions offered credit courses under contract. Of the 10 institutions that offered credit courses, six relied entirely on full-time regular faculty to teach the courses. Only three institutions used part-time adjunct faculty or external consultants for credit courses. Four institutions reported not offering credit courses at all. On average, 73 percent of contract-training programs for academic credit were taught by full-time faculty, 18 percent by part-time adjunct faculty, and 9 percent by external consultants.

Noncredit contract training was very different. Full-time faculty played a much smaller role, teaching on

average only 26 percent of the programs. Six institutions used no full-time faculty. Part-time adjunct faculty were used on average in 32 percent of noncredit contract-training programs; one institution used them in 100 percent of their noncredit programs. External consultants were the primary providers of noncredit instruction, teaching on average 42 percent of the programs.

Program Delivery

This section addresses the characteristics of program delivery by the institution's questioned. It covers where contract-training programs were held and on whose time? Services provided by the client and by the college are also included.

Contract-training locations. The 15 institutions were asked where they conducted their contract-training programs--at the client's site, on campus, or at some other facility? On average, about two-thirds of both credit and noncredit contract-training programs were held at the client's site. (See Table V). Two-year institutions also held an average of 30 percent of both credit and noncredit programs on their campuses, while the four-year institutions conducted an average of 16 percent on their campuses and 15 percent at other facilities off campus. There was no differentiation between credit and noncredit

programs.

Table V: Program Delivery:
Where Courses Were Conducted

	Client's Facility		On Campus		Other Facility	
	CR	NC	CR	NC	CR	NC
All Respondents	68%	69%	25%	22%	7%	9%
Two-year Institutions	68%	69%	32%	31%	0%	0%
Four-year Institutions	69%	68%	16%	17%	15%	15%

(CR=Credit; NC=Noncredit)

Whose time was used for contract-training? Control of the time assigned to contract-training gives the employer several advantages: it tends to ensure attendance and it allows control of what is studied. Time assigned for training is also an incentive to employees (McBride, 1993). When the question of whose time was used for training-- company time or employee time--results of two-year institutions showed less contract-training was conducted on company time than expected.

Table VI: Percentage of Respondents, by Institutional Type: On Whose Time Were Courses Conducted?

	Employer Time		Employee Time		Shared Time	
	CR	NC	CR	NC	CR	NC
All Respondents	49%	61%	17%	12%	34%	27%
Two-year Institutions	20%	34%	24%	19%	56%	47%
Four-year Institutions	71%	85%	23%	8%	6%	7%

(CR=Credit; NC=Noncredit)

Among all respondents, about 49 percent of credit instruction and 61 percent of noncredit instruction was conducted on paid time. (See Table VI). While two-year institutions conducted an average of 50 percent of credit and noncredit courses on shared time, the four-year institutions held an average of only 6 percent on shared time and an overwhelming three quarters of all programs on the client's time. Results also showed some evidence that credit courses tended to be scheduled off the job, either on the employee's time or on time contributed partially by both employer and employee.

Table VII: Percentage of Respondents, by Institutional Type: Who Pays for the Training?

	Employer		Trainee	
	CR	NC	CR	NC
All Respondents	89%	93%	11%	7%
Two-year Institutions	81%	85%	19%	15%
Four-year Institutions	99%	99%	1%	1%

(CR=Credit; NC=Noncredit)

Who pays? The question of who pays for contract-training was addressed--the employer or employee--and it was found that more contract-training was paid for by the employer than expected. (See Table VII). On average, 89 percent of contract-training programs for credit and 93 percent for noncredit were paid by the employer. The clients of the four-year institutions were more likely to support both credit and noncredit training, subsidizing them, on average, at the rate of 99 percent each. In this group of nine institutions, most clients paid 100 percent of the costs.

Services rendered by the client and the institution. During contract-training, what services are rendered by the contracting organization, especially when an average two-thirds of the training is provided at the client's site?

The questionnaire provided a check-off list of eight typical services offered by the contracting organizations: equipment, classroom space, recruitment of students, faculty travel expenses, advertising, supplies, and administrative services. All institutions responded that equipment was almost always provided by the client, as was classroom space by over 90 percent of the clients, and over 85 percent of them recruited the students. Other services were less frequently rendered: faculty travel expenses were paid by over 60 percent of clients; advertising by at least 65 percent of clients; supplies by about 30 percent; administrative services by over 25 percent; and co-instructors were provided by 5 percent or less.

Within the training contracts, the institutions rendered a range of services to their clients. Institutions were asked to review a checklist and give percentages of typical services that might be provided. The list of typical services provided by the institutions to their clients were:

Academic counseling	Orientation
Supplies	Program advertising
Classroom space	Recruitment of
Access to libraries	students
Tutoring	Evaluation of prior
Course design	learning
Career-development	Administrative
seminars	services
On-site registration	Use of bookstores
Food service	Selection of students
Dormitories	Computer center

Instructional
materials

Athletic facilities

For credit programs, on-site registration was always provided, as well as access to libraries, instructional materials, administrative services, and use of the bookstore. Space was provided by 30 percent of the respondents, and academic counseling and course design by about 70 percent.

For noncredit programs, 90 percent provided course design, instructional materials, and administrative services. Seventy percent provided on-site registration, and more than 50 percent provided supplies and space. There was no significant differences in services provided by two-year institutions and those provided by four-year institutions.

Many institutions mentioned the importance of ensuring that adequate services are rendered. However, since it is the client who agrees to the terms of the contract and usually pays for the services rendered, it is an open question as to where responsibility really rests.

The Overall Contract-Training Experience

Institutions were asked to discuss some of the problems they've encountered in conducting contract-training programs and to list some of the strengths of

their programs. The results show that institutions of contract-training programs have encountered many of the same obstacles and learned many of the same lessons. Despite the many differences in structures and programs, there is much similarity in what, ultimately, contract-training administrators have to confront.

Problems encountered. In reflecting on the problems they had to overcome in conducting contract-training programs, more than one-third of the institutions cited difficulties with regular faculty, either in trying to gain their support for the contract-training effort or in finding faculty who were current in their fields, who could conduct training (versus teaching theory), and who were effective in the business setting. A number of programs suggested cultivating faculty support through working with the departments and through campus publicity. Ensuring qualified faculty for programs meant building lists, training and auditing existing contract-training faculty, and training new faculty.

Problems with the general institutional climate were reported by about one-third of the institutions. Problems in adapting to new needs, traditionalism, turf jealousies, and administrative skepticism about contract-training programs all hindered progress. It was suggested that internal support be solicited by sharing information about

the benefits of contracting with the faculty and with the institution. Educational institutions may benefit by acquiring new populations of students, by gaining access to up-to-date industrial research facilities and equipment, by hiring as adjunct faculty members distinguished persons from the business communities, sites for student internships and employment, or by receiving financial support for programs (Powers, 1989). More specific efforts to have faculty/department representatives meet with clients, to build partnerships, and to maintain communication, also worked well.

Red tape, bureaucracy, and other problems in fiscal affairs were cited frequently. Marketing was mentioned as was the building of public awareness of the institution's services and establishing its credibility as a training center.

A few institutions mentioned not only problems within their organizations, but also obstacles outside their colleges and universities. In establishing successful contract-training programs, administrators discovered they must be sensitive to the unique needs and demands of business and industry. There is a traditional resistance on the part of American industry in turning to institutions of higher learning for training needs (Simpson, 1992). One key issue is lack of flexibility on the part of

institutions--in the time offerings of programs. Some management view education or training as loss of worktime and, thus, loss of productivity. Another important issue is the demand of industry for state-of-the-art high-technology, content, and instructional delivery systems. These are continuing issues/problems that must be dealt with in the development of contract-training programs. External support of business and industry could be solicited by sharing information about some of the benefits of contracting with an institution. Incentives for industry include access to human resources, training, and new knowledge--each area important in keeping pace in a constantly changing, technological environment (Milheim, 1991).

In many respects, the problems cited were no different from those encountered in any organization. All needed an investment of time and utilization of skills in the areas of public relations, political awareness, and professional attitudes. The success often depends on the ability of those in leadership who are managing the programs to solve enough of the problems so that contract training will function successfully.

Program strengths. The institutions provided lists of program strengths as can be seen in Appendix C. Most mentioned flexibility in meeting needs, quick response

times, high-quality programs, as well as strong custom-design capabilities. Faculty enthusiasm and expertise were also important. A number of institutions also listed an experienced professional staff and institutional commitment to contract-training as invaluable assets to contract-training programs.

Chapter Summary

On the whole, there is substantial agreement on what makes a program work. People work with what they have. These institutions have been very successful at contract training. Many of the items mentioned by respondents in this chapter may assist in putting together a successful program. The research revealed a great deal about contract-training. Contract-training is a complex enterprise. Milheim (1991) stated that

long-term credibility and success in contract-training demand things that have never been easy for academics: institutional change, flexibility, and a thorough understanding and appreciation of the structure of academic institutions, corporations, government agencies, and voluntary agencies. Contract-training is a bridge between them (p.18).

But as these 15 institutions illustrate, education can enlarge its mission to incorporate contract-training and do so with a high degree of success.

Given the findings from this research and the model institutions of contract-training in existence today,

Chapter III will address what a contract-training center would look like on the campus of California State University, San Bernardino.

**CHAPTER III:
A DESIGN PROPOSAL FOR
THE CENTER FOR TRAINING AND DEVELOPMENT (CTD)
AT CALIFORNIA STATE UNIVERSITY, SAN BERNARDINO**

Introduction

Contracting for training with business and industry has become big business. As the last chapter demonstrated, some institutions of higher education have sophisticated, well-defined contract-training programs that are in a position to respond quickly to corporate and government training demands. Given the training challenges that now exist, how should California State University, San Bernardino (CSUSB) respond? The challenge for the university is to act now to address the educational and training needs of both the emerging workforce and the current workforce, and to assist in removing educational barriers to mobility.

Based on a review of the literature, what successful models of contract-training programs look like around the country, taking into consideration the local geographic area and economy, and building upon what OEE has already been doing for over 15 years, this chapter will address what a Center for Training and Development (CTD) would look like on the CSUSB campus. The proposal calls for the center to be initiated, developed, and implemented as part of the Office of Extended Education (OEE) at CSUSB. The

center design will include the following facets:

background information on the Office of Extended Education, the administrative structure of the proposed center, administrative staffing, marketing, the clients, programs, faculty, program delivery, budget elements, and timeline considerations.

Office of Extended Education Background Information

The university's Office of Extended Education is the continuing education arm of the institution and provides a variety of courses, programs, activities and events through which the services and resources of the university are made available to a broad, general audience and are brought to bear on immediate issues and interests of the larger community of which the university is a part (Bulletin, 1994-95). Like comparable offices in the CSU system, the Office of Extended Education does not receive state funds for most of its programs. Therefore, costs of instruction, promotion, and staff salaries must be covered completely by fees charged to program participants. Thus the challenge for the Office of Extended Education is three-fold: it must (1) direct its services to the needs of its adult student population; (2) strive for the support of its parent organization; and (3) remain independently solvent financially in order to survive.

The Office of Extended Education at CSUSB, along with the university as a whole, has had a commitment to personal and professional growth and to community service since its beginnings in the 1960s. For the last decade, Extended Education has enjoyed the autonomy it needs to be innovative, creative, flexible, and responsive to the needs of its service area. All of these qualities are the same traits the "model" institutions claim are needed in order to develop a successful contract-training program.

Organizational structure. The Dean of Extended Education is responsible to the Academic Vice President, as are the deans of all academic departments. The Extended Education dean controls the unit's operating budget and directs the development and implementation of nearly all nontraditional program activity of the university. Faculty for the division's programs are drawn largely--though not exclusively--from the campus departments, and the departments carry approval and denial rights for all credit-bearing courses and programs.

OEE has combined elements from both the centralized and decentralized structures of organization to form what is called the matrix model of organization (Strother and Klus, 1982). Extended Education is autonomous in its financial structure, in its marketing and promotional efforts, in much of its student recordkeeping, and in the

development of new courses and programs. At the same time, OEE has sustained a need to work closely with the academic units on campus to solicit new program ideas and to ensure the academic quality of its activities. The working relationship between the dean of extended education and the chief academic officers and the willingness and readiness of faculty members to play different roles are central to the smooth and effective implementation of this model. With all of these elements at its disposal, the Office of Extended Education is currently in the ideal position to initiate, develop, and implement a contract-training program.

The Administrative Structure

Organizational structure of the proposed Center for Training and Development. How should the contract-training efforts be administered? Should there be a centralized or decentralized administration? The research showed that contract-training programs must be compatible with institutional goals and supported by a commitment from the institution and the senior officers.

Since the current organizational structure of OEE is a matrix model--depending greatly on the increased collaboration between a wider range of people and emphasizing interdependence of departments--the center would also be a

matrix model of organization. Although the model institutions researched were either centralized or decentralized, the matrix model would incorporate the best of both. Contracting would be administered by one office (OEE), but program development and implementation would involve the collaborative efforts of OEE, academic schools and departments.

By keeping the contract-training efforts administratively centralized, it gives OEE a high degree of flexibility and quick responsiveness regarding nontraditional client needs--two major ingredients for contract-training growth. It allows for creativity and efficiency without being bogged down in the bureaucratic structure of the larger institution. However, there needs to be collaboration with the academic schools and departments in developing and implementing contracts. Involvement and communication between OEE and the academic departments encourages the support of the larger institution.

Research of the model institutions showed territorial conflict problems. The matrix model would aid in avoiding conflicts with other units on campus because of the open lines of communication with faculty, departments, and senior administrative officers. It is critical to the success of the center that it become part of the institutional mission, allowing for all units to function

according to the directives. It must have legitimacy within the organization. The contract-training efforts through OEE must be unencumbered as much as possible by turf issues and organizational tradition.

Center facilities. What facilities would the center have at its disposal? Would offices, classrooms, and sleeping rooms be available? The availability of these facilities would obviously have an impact on the kinds of services that the center could offer.

The center would be housed in the Office of Extended Education. Initially, office space needs would include facilities for 1-2 full-time staff positions, as well as room for a resource center. Classroom space on campus is accessible on a year-round, space-available basis; however, sleeping rooms are available only during the summer months. The center would also make use of hotels and convention centers located in the institution's service area.

Self-supporting. To what extent would the center be self-supporting? For the most part, all of Extended Education is self-supporting. Initially, for the first twelve to eighteen months--the developmental phase--the center would need to have the support of the overall OEE budget. After that time, the center would be responsible for generating the volume of revenue necessary to cover both the direct and indirect expenses of its operation--as

is required of all program divisions within the unit.

Administrative Staff

How should the center's effort be organized in terms of personnel? Of the model contract-training programs in existence, the one major factor in the assignment of staff was volume of contracts per year (gross annual revenue). The institutions with larger annual revenues from contract-training had more staff members. The institutions with lower gross revenue were those who functioned with only part-time staff positions.

In order to conduct a large-scale effort, the center would need a minimum personnel commitment of the following:

- (1) one full-time director;
- (2) one full-time clerical assistant; and
- (3) one part-time marketing specialist.

The very nature of the contract-training business would require staff with high energy levels and interpersonal skills, a sense of enthusiasm, and entrepreneurial attitudes. The administrator providing leadership and guidance to the center must be able to walk in the worlds of education and business. Obviously, these staff positions would be a starting point. Staff size would grow with the center's success. One other point of emphasis is the strong recommendation by contract-training programs

currently housed in continuing education units that if a contract-training program is to be successful, it requires full-time staff--not staff who are part-time in multiple program areas within the unit.

Marketing

As a center is designed, it is important to address issues of competition and the marketing approaches to be utilized. Is a marketing plan important? How should the center market to potential clients and which organizations should be approached?

Table VIII: The Training Competition: The Provider's Perspective vs. Business & Industry's Perspective

	Colleges & Univer.	Priv. Consult.	Trng. Vendors	In-House	Faculty within same Institu.	Voc. or Tech. School
Institu. (Providers)	60%	50%	44%	26%	15%	0%
Bus. & Indus. (Clients)	50%	31%	13%	40%	0%	9%

Competition. Who are the potential sources of competition for the center and how does the center keep apprised of them? Based on responses from the model contract-training programs and a recent survey of local businesses conducted by Donna Boyd (see Table VIII), the

chief sources of competition are: other colleges and universities; private consultants; training vendors; and in-house corporate or government training programs. It is important that the director of the center network with other professionals of institutions in the training field, become a member of a professional organization such as the American Society for Training and Development (ASTD), and be active in the local Chamber of Commerce. The director should also form a center advisory committee as soon as possible.

The advisory committee would be chaired by the center director, with committee members consisting of individuals from campus and the community. The committee would include: two representatives from School of Business and Public Administration--one familiar with the private sector and the other from Public Administration; a local government official; a local economic development representative; a private business chief executive officer; and a chamber of commerce representative. This committee would be created to foster business/higher education relationships/partnerships. According to Powers (1989), such a committee would serve to

build bridges of communication and interdependence, act as forums in which broad issues affecting both sectors can be explored, to express joint concerns in a united voice to the community, and provide information to both sectors on each other's current

and future needs and how some of those needs can be met more effectively through cooperative programs (p. 20).

Should a marketing plan be developed? If so, who should it target? In order to have a successful contract-training program, the data revealed that a marketing plan would be necessary. It is important to define the market(s) that the center wants to reach. The following sources should be targeted initially:

- (1) participation lists--contact firms that have supported Extended Education programs in the past;
- (2) state directory of business and industry--lists training directors of companies;
- (3) educational directories of state associations;
- (4) the chamber of commerce membership; and
- (5) professional organizations.

Development of a marketing plan lays the foundation for beginning to build relationships and a potential client base. The center would need to work on awareness raising, image building, and selling. The objectives of the plan would be to generate and increase visibility in the business community and to target particular clients, such as those listed, in the process.

Marketing strategies for the center. What should be done to get the word out about the center? It was evident

from the research that much time and money was spent reaching clients through the mail and using the "personal touch." "Those marketing strategies that are successful seem to incorporate a broad concept of marketing and many types of advertising" (Bevelacqua, 1985, p.44). The marketing strategy for the center should be to:

- (1) send a direct mail publication (two mailings per year to the same audience and the next year target a different group);
- (2) follow up with personal sales calls (set a goal of 10-15 calls per week);
- (3) make presentations to special groups (twice monthly);
- (4) advertise and make use of media releases;
- (5) network; and
- (6) generate a semi-annual business newsletter.

Making personal sales calls is very time consuming, but an effective marketing strategy for a number of institutions. It is important for the center and its personnel to be visible and accessible to the business community. As much as possible, background research on the prospective organizations should be done prior to making the calls.

The Clients

Type and size of organizations to serve. For the first 18-24 months in existence, the center should concentrate on targeting all local/regional organizations--

small, medium, and large in size. It will take time to create visibility and generate interest. The center should focus in on two market segments: business and industry, and local government. As follow up to the direct mail pieces that everyone receives, the center director should give the "personal touch" initially to small (fewer than 100 employees) and medium-sized (100 to 500 employees) businesses in the service area. It is important that the center develop/implement a few success stories early on, giving it time to work through the "labor pains" associated with initiating a new endeavor. This would also allow time for the center to find its market niche, and realize its capabilities and program limitations, if any. Time also needs to be spent building campus visibility, support, and involvement as well.

Who should the center contact at the client organizations and who in the client group would most likely make the decision to establish a training center? As the institutional data disclosed, in soliciting small businesses it is important to go directly to the chief executive officer/owner of the business. They are, in most cases, the decision-makers. In medium and large-sized organizations, the center staff should direct their efforts to the training or personnel directors.

Evaluation. The center must engage in regular assess-

ment of client satisfaction. The research data revealed that all institutions with contract-training programs reported making some effort to evaluate their programs.

Phillips explains that

program evaluations are essential tools of program planners and instructors. Information provided by evaluations can help analyze strengths and weaknesses in how programs are conceptualized, planned, and delivered (p.69).

The importance of evaluating programs is to answer the following questions:

1. Did the program accomplish what was planned?
2. If the program did not accomplish what was planned, where did the program fail and why?
3. How should the program be revised if it is offered again?
4. What was learned from one program evaluation that can be used in strengthening other programs?

All contracts, credit and noncredit, must be evaluated.

The following assessment tools should be used:

participant/trainee evaluation, client evaluation and, if applicable, follow up interviews with clients. All credit programs, based on CSU Chancellor's Office regulations, require the use of an academic evaluation tool (e.g. written assignments, testing) for all trainees as well.

Who should the center train? The campus is full of

"human resources." There are numerous courses/programs that could be offered to all categories of trainees. However, taking into consideration the center's service area, the majority of trainees would most likely consist of middle management and first-line supervisors--which follows the data provided by the contract-training respondents. This does not mean senior and upper management, professional workers, or sales/marketing personnel should be ignored. The center needs to be accessible and available to address the needs of all categories of trainees. In the end, private consultants may be needed or possibly referral made to another institution to provide the contract-training program that better serves the client's needs.

Programs

Should the center offer both credit and noncredit programs? The center should offer both credit and non-credit programs. Credit courses could comprise both continuing education professional advancement credit and degree-applicable credit. Academic schools and departments carry approval and denial rights for all credit-bearing courses and programs. Based on the research data, it is most likely the majority of courses will be noncredit. This is due to less restrictions and ease of

processing required for noncredit delivery--as apposed to credit. A quick response time to client needs is vital to the success of the center, so noncredit programs will be of most interest to organizations.

How should the center deliver contract-training programs? The center would make both individual courses and certificate programs available. Degree programs would not be advertised or solicited. Only in very special and unique cases, pending proper campus approvals, could such a program be considered. Research supports this system of delivery.

Customization versus on-the-shelf. Should courses/programs be customized--specially designed to meet the client's needs--or should on-the-shelf courses--those previously developed and ready to go--be provided for clients? Data showed that all institutions customize programs and on average two-thirds of all programs were specially designed for their clients.

The center should advertise and make readily available popular on-the-shelf courses and certificate programs, be willing to make adaptations to on-the-shelf courses, and also be capable and flexible enough to design major new courses/certificate programs to meet specific client needs. Customization must be available to the client who may have very unique needs and concerns that

no other pre-existing course or program can meet.

Processing client requests and response time required.

Client demands must be met with quality programs quickly. Research suggested there are numerous ways to respond to clients, but each contract-training program must identify a method that will work effectively. The center would implement the response process that most of the successful institutions utilize:

1. visit the worksite;
2. analyze or define the problem, or conduct needs assessment;
3. Review the institution's capability to respond;
4. evaluate trainee experience and background;
5. with participation of instructor, client, and trainees, set objectives and design course or program to address the problem; or design objectives, design the course or program, and meet with management and labor to agree on final outline;
6. present final proposal, negotiate terms, reach agreement (this step should include an outline stating responsibilities);
7. develop instructional plan and training materials;
8. deliver training; and
9. conduct evaluation.

This process would require the center director to make the initial contact and then to locate a faculty member knowledgeable in the desired content area or field to colla-

borate in the development and implementation of the contract. On the average, the process from initial contact to delivery could take eight to twelve weeks.

Faculty

What instructors would the center utilize for contract-training programs? The center would give first priority to interested and qualified university faculty. Preferred faculty would be those who could be understanding and sensitive to the unique needs and demands of business and industry. The center would provide opportunities for faculty to be innovative, to propose new program ideas, to work with new student markets, and to explore new instructional formats and teaching modes. When regular full-time and part-time adjunct faculty are not available, the center would look outside the institution to external consultants.

Program Delivery

Where and when would the center offer the contract-training programs? What services would be available to the client?

Locations. The center would conduct contract-training programs at the client's site, on campus, or at off-campus facilities such as local hotels. Contract-training programs must be held at locations convenient for the

client, trainees, and the faculty.

Scheduled times. The center must make every effort to accommodate the client's reasonable timeline and the scheduling times of courses. Courses would be offered on the client's time, on the trainees' time, or on a combination of the two. Research results of other contract-training programs showed that 50-60 percent of all programs were conducted on paid time. The Center for Training and Development must be flexible in order to successfully accommodate nontraditional learners.

How would revenue be collected? Again, the center must be flexible. Payment may be made by the employer, the employee, or by a combination of the two. Revenue could be collected in the form of checks, money orders, purchase orders (which would generate invoices), or by credit cards. Responsibility for payment and due date would have to be determined prior to contract-training courses being held and written into the official contract document.

Services rendered. The center would make available to clients all of the following services (for a fee):

Academic counseling	Orientation
Supplies	Program advertising
Classroom space	Recruitment of students
Access to library	Evaluation of prior learning
Tutoring	Administrative services
Course design	Use of bookstore
Career-development seminars	Food service
On-site registration	Computer labs

Dormitories
Instructional
materials

Athletic facilities

When courses are held at the client's site, typical services offered by the contracting organization may include equipment, classroom space, recruitment of students, and advertising. In providing their own services, the client would have a cost savings. The center must ensure that adequate services are rendered, that needs are met, and from the very beginning, that everyone understands and agrees to the conditions and services provided by the client and the center.

Budget Elements

Budgets are a central instrument in the planning process. They enable organizations to establish priorities and allocate limited resources, to designate responsibilities, and to assess the effectiveness of performance (Bevelacqua, 1985). Budgeting would be an especially crucial process in the development and maintenance of the Center for Training and Development. Since OEE does not receive state funds for its programs, it is important that the center complete individual program budgets on all contract-training efforts. It would be vital to the center's survival that costs such as instruction, promotion, and staff salaries be covered by the fees charged to

the clients.

Direct and indirect expenses. The program budgets should be aimed at covering all direct and indirect costs. The direct expenses would include: facilities rental, catering, instructional and developmental costs, promotions/ marketing, travel, parking fees, audio-visual, registration and course materials, miscellaneous services provided (i.e. needs assessment or academic counseling), supplies and services, secretariat (staff) expenses/reimbursements, and a built-in contingency (for emergencies and last-minute expenses, not initially covered). The indirect expenses would always include: the California State University central administrative charges--fees the university and the Chancellor's Office charges OEE for their services (i.e. accounting, records) and OEE administrative overhead charges (to cover staff salaries).

Breakeven. In addition to being able to accurately determine direct and indirect expenses, good budgeting would be dependent upon the breakeven number used. The breakeven number would be the number of participants who could attend the activity to ensure that the center recovers enough money to cover all expenses (as defined above). This number would be a projection (guess). Generally, it should be as low as possible. However, if it is too low, the price per participant may not be

competitive. Therefore, much thought and care would need to be taken in projecting the breakeven number. The price per participant would be arrived at by determining the sum of all direct and indirect costs and dividing that sum by the breakeven number. (An example budget form is located in Appendix D.)

Timeline Considerations

Contract-training activity involves many players. It is important to a program's success that all key people know what is happening and when it should/would occur. A timeline of activities would be an effective tool for establishing deadlines and maintaining priorities because it aids in keeping all players directed and on task. One should be developed for each individual contract and shared with everyone affected by it--i.e. center staff, the client, instructors.

A contract-training program timeline would include deadlines for such activities as: contract confirmation, facilities reserved, instructors identified, needs assessments/testing, developing program content, promotions, registration, program evaluation, and distribution of grades/certificates. (See Appendix E for a sample Timeline of Activity.) In order to ensure the timeliness of program implementation and delivery, the center must enforce the

timeline and keep the contract on target. If setbacks occur, and no doubt they will, the timeline would need to be updated/ revised and redistributed. The key is effective communication with all parties; this does not guarantee success, but it greatly increases the possibility.

Chapter Summary

This chapter focused on the design of a Center for Training and Development to be housed and administered out of the Office of Extended Education at CSUSB. Based on the design, the following elements must be included:

1. The current organizational structure of OEE and its role within the university.
 2. What the administrative structure for the center should look like in terms of its organizational structure, facilities, and the objective of it being self-supporting.
 3. The administrative staff--its organization in terms of personnel.
 4. Marketing requirements including competition and approaches, the marketing plan, marketing to potential clients, and the selection of certain organizations to approach.
 5. The clientele the center would serve.
- Questions addressed included, what

types/sizes of organizations should be served, who should be contacted, who is the decision-maker within the client organization, who should the center train, and what types of evaluation to use.

6. The program--should the center offer both contract credit and noncredit programs, how should the center deliver the programs, should the center customize courses or offer on-the-shelf programs, how should client requests be processed, and how long should it take.
7. Utilization of faculty/instructors.
8. Program delivery in terms of where and when the center would offer programs, how revenue would be collected, and what services could be provided.
9. Budget elements and the importance of the center utilizing breakeven budgets in the planning and implementation processes of all individual contract-training programs.
10. Timelines of activity used as effective tools for staying on task and on target.

This chapter addressed many necessary success factors in the design proposal including: full-time staff needs; a

thorough understanding of both the education and corporate cultures/environments; an institutional directive for the center and all contract-training efforts be housed in OEE; open communication between the center, the university community, and the client organizations; mutual agreement regarding project goals and objectives; and, flexibility.

Given the basic elements of the design proposal and considerations for success for the Center of Training and Development, Chapter IV will take the next step by addressing program recommendations for the center. What can the center provide to the corporate community in terms of programming? What are their needs?

The Center for Training and Development would provide

attitudes.

level and some desired level of knowledge, skills, or

A need represents a gap between an individual's current

educational need is something individuals should learn for their own good, for the good of their organization or profession, or for the good of society (p.82).

programs to meet those needs. Knowles (1970) explained an

goal would be to identify needs and develop courses and

exist and how the center can best respond. The center's

This chapter will look at what training needs actually

to the challenge before it?

CTD to meet this challenge? How should the center respond

and government agencies. What opportunities exist for the

education and training needs of both business and industry,

campus. The challenge for the CTD would be to address the

Training and Development would look like on the CSUSB

variety of organizations; and (3) what a Center for

taining substantial contract-training activities with a

universities have been successful in establishing and main-

(1) training needs do exist; (2) numerous colleges and

The first three sections of this text demonstrated:

Introduction

CHAPTER IV: THE CENTER FOR TRAINING AND DEVELOPMENT (CTD) - PROGRAM RECOMMENDATIONS

on-site education and training to corporations, government agencies, and voluntary associations. CTD would work closely with organizations to assess the needs of employees and develop effective programs to meet those needs. In order to compete successfully for contract training, the center must be able to provide programs that organizations desire.

Factors and Concerns of Business and Industry That Affect Training Needs

Educating the work force has become increasingly important for American corporations. Knowledge of technology, markets, and administration has always been essential to business success. Today's corporate leadership is also very concerned with its ability to respond to change and thus is more concerned with maintaining a highly skilled and informed work force than at any previous time in history. For corporations, remaining competitive requires investing in the career-long learning of their employees.

Factors of significant impact to business and industry that influence training needs include: (1) technological advances; (2) overall tightening of the labor market; (3) heightened global competition, deregulation, and other changes in the business environment that have forced the adoption of new strategies and goals for companies; (4)

deficiencies in the work force such as poor writing and language skills; and (5) elimination of jobs. These factors and issues influence the direction that corporate training needs will take. As we head toward the 21st century, employers are relying on the skills of workers to raise efficiency and quality, improve customer service, and develop new applications for existing products and services. This requires a prepared and skillful work force--one which can adapt to the changes of an international economy.

In a recent survey of local business and industry, results showed that the most needed training programs included: computer training, management skills, communication skills, and basic skills. Based on the needs of business and industry at both the local and national levels, what types of training should the CTD provide?

Program Recommendations

Current work force and individual coursework offerings. Program recommendations for the center would include providing customized professional development seminars/courses in the following skill/content areas for the training of the current work force:

1. Basic skills: A high percentage of the current work force lacks basic skills such as reading, writing, and math. Courses need to be provided in literacy, writing, compre-

hension of the English language, and mathematics. New technology also requires an even wider variety of basic skills--higher level mathematics and reading abilities.

2. Computer skills: In order to be competitive, Americans will need to become more computer literate. Basic course offerings in Word Perfect, Word Perfect for Windows, Introduction to Personal Computers, and Fundamentals of Spreadsheet would be steps in the right direction.
3. Communication skills: Employers have complained that employees need to learn to work effectively with others--to work collaboratively. Courses in speaking, presenting papers, conducting meetings, and effective listening should be offered. For example, the effective listening course would help specifically in the work place--listening to participate. It would teach the trainees to discuss, to negotiate, to find solutions, to make decisions. Offerings in conflict resolution and work relationships would also be popular.
4. Creative Thinking/Problem Solving skills: Objectives for such course offerings would be the application of knowledge toward the solution of problems, the creation of alternative choices, and the projection of possibilities in decision-making.
5. Management skills: Two programs of importance in this area would be Total Quality Management (TQM) and Management Development.

TQM-Skills attained in this program, as applied by individuals and companies, would help American industry recoup its position in the world market and ensure ongoing profitability, employment, and continuous improvement of the work environment. Courses would focus on Total Quality theories and the building and maintaining of team environments.

Management Development-Courses to help supervisors and managers replace outdated modes and methods of management with healthier, more effective work practices. These courses would examine issues such as social and technical change, cultural diversity, total quality and work place issues. The primary goal would be to help those in leadership positions learn relevant work practices for the '90s as America faces the challenges of restructuring local and global economies.

The Office of Extended Education has already developed courses that are listed under individual extension course offerings that could be of interest to local business and industry. These on-the-shelf courses include: Writing that Works for Business, Understanding Business and Finance, Understanding Organization and Administration, and Understanding Sales and Marketing.

Certificate programs. Certificate programs should be offered by the center providing employees a quick concentrated way to acquire a solid core of knowledge and practical experience in specific fields. A quality curriculum, guided by practical up-to-the-minute skill application and information about job improvement, would give business an edge in today's competitive market. The following on-the-shelf certificates would be available for companies:

1. Women in Management
2. Professional Human Resources Management
3. Management Skills

4. Total Quality Management (TQM)
5. MS DOS Computers for Business Professionals
6. Computer-Aided Drafting and Design
7. Graphic Communications
8. Mortgage Banking

These certificate programs could be implemented as they currently exist or could be modified to meet the specific, individualized needs of organizations.

Other possible certificate program topics (requiring development) that would appeal to business and industry include:

1. Executive Program in Sales Management and Marketing. This program would be of interest to sales and marketing executives--a group that colleges and universities nationwide have ignored in contract-training efforts. Trainees would focus on internal operations of firms and global and strategic issues affecting marketing activities.
2. Multiculturalism and Diversity. This certificate would train managers and other employees to identify issues and problems that stem from cross-cultural differences. Trainees would develop an awareness of differing cultural values and learn how to build openness, effective communication and teamwork in the workplace. The goal would be to help businesses create environments that both nourish and benefit from diverse cultural and ethnic influences.
3. Customer Service. This certificate would be important for receptionists, secretaries, sales personnel, and other employees that have contact with the public. Topics would include: business etiquette, telephone communication skills/phone courtesy, dealing

with difficult people/irate customers, decision-making and problem-solving techniques, telemarketing dynamics, and customer service.

Corporate in-service day(s). Many organizations, public and private, hold semi-annual/annual motivational training days for large numbers of their employees. In these instances, the center may not be needed for program content development or instruction; however, the center could facilitate and host the event--providing professional attention to all a company's meeting needs. The organization would be charged for the services provided. These services might include: full event staffing, budget development, contractual agreements with speakers, on- and off-campus meeting arrangement, publicity, registration services, special event coordination, exhibitor/vendor setup, catering, and audio-visual support. Such a service would be provided by the Conference Services division of OEE in collaboration with the center.

Retraining of displaced workers. Many companies are using education to help their workers adjust to the most severe change of all--elimination of their jobs. This could be a strong market for the center. With the recent closer of some defense plants in Southern California and Norton Air Force Base in San Bernardino, the center could provide academic/educational counseling regarding career

paths and job markets. Many displaced workers need to update skills and retrain in order to be competitive in today's job market.

Resource center. The CTD would be a place where professional business people could come for career counseling/advising, training, retraining, updating of skills, and finding assistance with job referrals and placements. Current business journals, newsletters, and other publications would be available for individuals to review. The center needs to be accessible to the individual as well as the larger organization as a whole. It would be through the CTD resource center that businesses could begin their personnel job searches. A resource center would provide visibility for the center and aid in building positive local business and center relationships. It is important that organizations realize that the CTD is going to give back to the local business community by providing these important services through the resource center. The resource center would cost the CTD in human resource time initially, but the payoffs, in the long run, could be well worth the time and investment.

Chapter Summary

Organizations and business professionals from diverse fields would be looking to the CTD for training and

education to help them adapt to changing times. As discussed in this chapter, the center should provide individual course offerings--on-the-shelf and customized--to the current work force. These offerings would include courses that build basic skills, computer skills, communication skills, creative thinking/problem solving skills, and management skills. Certificate programs, which provide business and industry with concentrated, content-specific coursework, should also be available. A number of on-the-shelf certificate programs already exist and could be ready to go, while new certificate programs in sales management and marketing, multiculturalism and diversity, and customer service would have to be developed.

The facilitating of in-service training days for local business and industry, and possibly, for professional organizational meetings are concepts that contract-training programs nationwide have not grasped. This is a service much needed by the business community.

The center would also be involved in the training and retraining of displaced workers, and would provide a resource center accessible to organizations and business professionals alike. The resource center would be a place to network, research jobs, post job offerings, receive career counseling and advisement, and a place to update skills and retrain in new careers.

All employees will have to: learn to accept change and retraining as a part of their work life; become better readers and writers; become better problem solvers; learn to communicate well with employers, co-workers, and customers; and increase their overall people skills. Certainly, there are many challenges and diverse directions ahead for the Center for Training and Development. America cannot maintain or regain a competitive position in the world economy without a better prepared work force. Employers, employees, and the center would have to work together to ensure local training and education needs would be met. It must be a collaborative effort--working together for common good and common goals.

The final section of this paper, the conclusion, will summarize this project.

CHAPTER V: THE CONCLUSION

This chapter presents a summary of the project and its findings. The design proposal for the Center for Training and Development and program directions in which the center should head will be reviewed.

Project purpose. The purpose of this project was the development of a contract-training center on the campus of California State University, San Bernardino. This was to be accomplished by reviewing the fact that local business and industry training needs do exist and then by examining other university/college-based models of contract-training programs. Based upon the findings and research of the institutional models, a contract-training center would be designed, and the project would conclude with recommendations of program directions the center would take.

Do training needs exist? Through a review of contract-training literature and a recent graduate project completed by Donna Boyd (1994), results showed that employers are very interested in obtaining services from colleges and universities of higher education. Business and industry are anxious to increase the skills of the work force in order to be competitive in a global economy, and, ultimately, for the survival of their companies.

College/university-based models of contract-training

programs. The data research revealed that a number of institutions of higher education have sophisticated, well-defined contract-training programs that are in position to respond quickly to corporate and government training demands. On the whole, there is substantial agreement on what makes a program work. The institutions researched have been very successful at contract training. As these 15 institutions illustrate, education can enlarge its mission to incorporate contract-training and do so with a high level of success.

Center design. The design proposal calls for the Center for Training and Development to be housed and administered out of the Office of Extended Education at CSUSB. A summary of the elements to be included in the center are outlined in the conclusion of Chapter III. The design proposal addressed: background information on the Office of Extended Education, the administrative structure of the proposed center, administrative staffing, marketing, the clients, programs, faculty, program delivery, budget elements, and timeline considerations.

The center design recognizes the necessary success factors to include: full-time staff positions; an institutional directive for the center and all contract-training efforts to be housed in OEE; open communication lines between the center, the university community, and the

client organizations; and mutual agreement regarding project goals and objectives.

Program recommendations. The center must take into consideration concerns of business and industry that would affect the types of training offered including: technological advances; a tight labor market; heightened global competition, deregulation, and various other changes in the business environment having forced the adoption of new strategies and goals for companies; a deficiency in basic skill levels of the work force; and displaced workers.

The center would provide individual courses and certificate programs--on-the-shelf and customized. Program recommendations also called for the center to provide facilitation and hosting of large group meetings. The center would be involved in retraining displaced workers and in providing a resource center accessible to the business community. This would make the center more visible and accessible to the community it would serve.

In conclusion, the research revealed a great deal about contract-training. Contract-training is a complex enterprise, and informed and sophisticated leadership is a key to its success. The marketplace of business and industry is different in many ways from the marketplace of individual students. It is a highly competitive

marketplace. Successful organizations competing in the contract-training market-place are service-oriented and have customer relations support. Timely and quality product delivery, personal attention to customers, timely refunds, accurate billing, competitive pricing and professional marketing advertising are characteristics of colleges/universities that are successfully competing in this marketplace.

Of primary importance would be the center's ability to be flexible and creative as well as to deliver the highest quality product. There must be both institutional investment and corporate support for developing successful contract-training programs. While there indeed is some risk in starting a contract-training center, the timing is ripe. Business and industry today are investing in human resources as the single most powerful tool to help them reclaim the competitive edge, especially as the 21st century approaches. The vision and leadership of David Kearns, a corporate CEO, provides further testimony as to why the timing is ripe for this work:

The simple truth is that we can't have a world-class economy without a world-class work force, from senior scientists to stockroom clerks. And we cannot have a world-class work force without world-class education and training. My interests are both selfish and selfless. No company, no organization, can be better than its employees. As a businessman, I care about education, not for reasons of philanthropy and altruism alone--

although they are important--but for bottom-line hardheaded reasons. I care about education because profits depends on it. Without it, our society will founder, and our businesses will, as well (Galagan, 1990, p.44).

The Center for Training and Development should begin now to meet the needs of business, industry and government agencies--to face the challenge of training and retraining the work force head-on. The time is ripe. The time is now.

APPENDICES

APPENDIX A:

QUESTIONNAIRE

(Used in telephone interviews and written surveys.)

INSTITUTIONS OF HIGHER EDUCATION
CONTRACT-TRAINING QUESTIONNAIRE
(based primarily on 1993-94 operations)

A questionnaire administered by the Office of Extended Education at California State University, San Bernardino.

Part I: General

1. Institution's Name: _____
2. Department Name: _____
3. Current Director
 - a. Name: _____
 - b. Title: _____
4. Address: _____

5. Telephone #: () _____
6. a. Your Name (if different from #3 above): _____
b. Title: _____

Part II: Contract-Training History

7. How many years has your contract-training program been in existence? _____
8. How was your program originally started? (check one)
_____ as an outgrowth of a continuing education unit
_____ independent of any existing continuing education unit
_____ other _____

-continued-

9. By whom was your program initiated?

10. Whose approval was needed to initiate your contract-training program?

11. What, if any, start-up costs were associated with the effort? _____

12. What obstacles, if any, had to be overcome?

13. Additional comments regarding the history of contract-training at your institution. _____

Part III: Administrative Structure

14. a. How are contract-training efforts administered at your institution?

_____ centralized administration

_____ decentralized administration

b. Explain how requests for contract-training are processed. _____

15. On your institution's organizational chart, to whom does the contract-training director/administrator report? _____

-continued-

16. Is your contract-training program financially:
 (check one)
 self-supporting (no state or institutional funding).
 self-supporting, but receives some support from the institution.
 state supported.
 other _____
17. a. Do you experience territorial conflicts with other units on campus that are providing, or may want to provide, training directly?
 _____yes _____no
 b. If yes, how can you avoid such conflicts?

18. Which of the following facilities does your contract-training program have at its disposal: (Check all that apply.)
 own building
 own offices
 on-campus conference facilities
 classroom and meeting space controlled by your program
 sleeping rooms
 other _____
19. Additional comments regarding the administrative structure of your contract-training program.

-continued-

Part IV: Administrative Staff

20. What staff did your contract-training program utilize in 1993-94 and, of those staff, were they full-time or part-time positions?

<u>Title</u>	<u># positions</u> <u>full-time</u>	<u># positions</u> <u>part-time</u>	<u>If p.t.,</u> <u>% of time</u>
_____ director	_____	_____	_____
_____ asst. director	_____	_____	_____
_____ prog. specialist/ administrator	_____	_____	_____
_____ clerical/ support staff	_____	_____	_____
_____ marketing specialist	_____	_____	_____
_____ other	_____	_____	_____

Part V: Marketing

21. Who are the chief sources of competition for contract-training programs in universities and colleges? (Please rank.)

- _____ other colleges and universities
- _____ private consultants
- _____ in-house corporate or government training programs
- _____ other _____

22. How do you find out what your competition is?

-continued-

23. a. Does your contract-training effort have its own marketing plan? yes no
 b. If yes, in a few sentences, describe what that plan is. _____

24. a. Do you have a marketing budget for your contract-training efforts? yes no
 b. If yes, how much do you budget annually? \$ _____

25. Do you attempt to analyze your market?
 yes no
 Please explain briefly. _____

26. What does your contract-training program do to market to potential clients? (Check all that apply.)
 personal sales calls
 presentations to special groups
 telephone sales calls
 direct mail efforts
 newsletters
 professional networking
 media releases and advertisements
 other _____

27. How do you determine which organizations to approach? Explain briefly.

28. Specific groups your program targets?

29. What percentage of your overall effort resulted in a signed contract over the last year? _____

-continued-

30. Additional comments regarding your marketing plan.

Part VI: The Clients

31. Annual number of contracts written? _____

32. Annual revenue generated? _____

33. What types of organizations does your program serve?
(Check all that apply.)

- business and industry
 government agencies
 voluntary associations
 other _____

34. What size organizations does your program serve?
(Check all that apply.)

- small organizations (fewer than 100 employees)
 medium-size organizations (100 to 500
employees)
 large organizations (more than 500 employees)

35. When soliciting training contracts, who do you contact
at the client organizations? _____

36. Who in the client group makes the decision to
establish a training contract? _____

37. Among your signed contracts, who initiated them?
(Please give percentages.)

- clients
 your program

-continued-

38. a. Do you assess client satisfaction with your contract-training program? _____yes _____no
- b. If yes, what procedures do you use? (Check all that apply.)
- _____ participant evaluations
 - _____ client evaluations
 - _____ follow-up interviews with clients
 - _____ assessment of trainee change (pre- and post-tests)
 - _____ other _____

39. What percentage of contract-training, reported this last year, was with prior clients? _____

40. Please distribute the trainees served into the following eight categories: (Please use percentages.)
- senior and upper-level management _____
 - middle management _____
 - technical and professional workers _____
 - first-line supervisors _____
 - sales and marketing personnel _____
 - secretarial and clerical workers _____
 - operators and craft workers _____
 - others _____

41. Additional comments regarding clients.

Part VII: Programs

42. Of the contract-training programs provided by your institution, what percentages comprised credit and noncredit offerings?
- credit _____ noncredit _____

-continued-

43. Of the contract-training programs offered, how were they delivered? (Please use percentages.)
- _____ individual courses
 _____ certificate programs
 _____ degree programs
44. What types of programs do you provide for your clients? (Please use percentages.)
- _____ customized courses
 _____ "on-the-shelf" courses
45. What methods are used for processing client requests (from requests for training to the beginning of the training sessions)? _____

46. Additional comments regarding programs.

Part VIII: The Faculty

47. Who are the instructors for your credit contract-training programs? (Please provide percentages for each.)
- _____ full-time regular faculty
 _____ part-time adjunct faculty
 _____ external consultants
 _____ other _____
48. Who are the instructors for your noncredit contract-training programs? (Please provide percentages for each.)
- _____ full-time regular faculty
 _____ part-time adjunct faculty
 _____ external consultants
 _____ other _____
49. Who hires the faculty to teach credit courses?

--continued--

50. Who hires the faculty to teach noncredit courses?

51. Additional comments regarding the faculty.

Part IX: Program Delivery

52. Where are contract-training programs conducted?
(Please use percentages.)

_____ client's site

_____ on-campus

_____ other facility _____

53. On whose time was credit contract-training conducted?
(Please use percentages.)

_____ company time

_____ employee time

54. On whose time was noncredit contract-training
conducted? (Please use percentages.)

_____ company time

_____ employee time

55. Who usually pays for the credit contract-training
program? (Please use percentages.)

_____ employer

_____ employee (trainee)

56. Who usually pays for the noncredit contract-training
program? (Please use percentages.)

_____ employer

_____ employee (trainee)

-continued-

57. During contract-training, what services are rendered by the contracting organization? (Check all that apply.)

- equipment
- classroom space
- recruitment of students
- faculty travel expenses
- advertising
- supplies
- administrative services
- other _____

58. What services are provided to your credit contract-training clients? (Check all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> academic counseling | <input type="checkbox"/> orientation |
| <input type="checkbox"/> supplies | <input type="checkbox"/> program |
| | <input type="checkbox"/> advertising |
| <input type="checkbox"/> classroom space | <input type="checkbox"/> recruitment of |
| <input type="checkbox"/> access to libraries | <input type="checkbox"/> students |
| <input type="checkbox"/> tutoring | <input type="checkbox"/> evaluation of |
| <input type="checkbox"/> course design | <input type="checkbox"/> prior learning |
| <input type="checkbox"/> career-development | <input type="checkbox"/> administrative |
| <input type="checkbox"/> services | <input type="checkbox"/> services |
| <input type="checkbox"/> on-site registration | <input type="checkbox"/> use of bookstores |
| <input type="checkbox"/> food service | <input type="checkbox"/> selection of |
| | <input type="checkbox"/> students |
| <input type="checkbox"/> dormitories | <input type="checkbox"/> computer center |
| <input type="checkbox"/> instructional | <input type="checkbox"/> athletic |
| <input type="checkbox"/> materials | <input type="checkbox"/> facilities |

59. What services are provided to your noncredit contract-training clients? (Check all that apply.)

- | | |
|---|--|
| <input type="checkbox"/> academic counseling | <input type="checkbox"/> orientation |
| <input type="checkbox"/> supplies | <input type="checkbox"/> program |
| | <input type="checkbox"/> advertising |
| <input type="checkbox"/> classroom space | <input type="checkbox"/> recruitment of |
| <input type="checkbox"/> access to libraries | <input type="checkbox"/> students |
| <input type="checkbox"/> tutoring | <input type="checkbox"/> evaluation of |
| <input type="checkbox"/> course design | <input type="checkbox"/> prior learning |
| <input type="checkbox"/> career-development | <input type="checkbox"/> administrative |
| <input type="checkbox"/> services | <input type="checkbox"/> services |
| <input type="checkbox"/> on-site registration | <input type="checkbox"/> use of bookstores |
| <input type="checkbox"/> food service | <input type="checkbox"/> selection of |
| | <input type="checkbox"/> students |
| <input type="checkbox"/> dormitories | <input type="checkbox"/> computer center |
| <input type="checkbox"/> instructional | <input type="checkbox"/> athletic |
| <input type="checkbox"/> materials | <input type="checkbox"/> facilities |

-continued-

60. Additional comments regarding program delivery.

Part X: The Overall Contract-Training Experience

61. Reflect briefly on some of the problems you've encountered in conducting contract-training programs.

62. List briefly some of the strengths of your program.

63. Do you have any recommendations to make to those considering offering contract-training programs?

THANK YOU FOR TAKING THE TIME TO ANSWER THESE QUESTIONS!

PROFILES OF PARTICIPATING INSTITUTIONS

APPENDIX B:

AUSTIN COMMUNITY COLLEGE

Austin, Texas

Public, two-year community college

Enrollment: 29,000

Contract-Training History	Contract-training programs in existence for twelve years. Initiated by the coordinator of Business Programs in the Continuing Education Division. Start-up costs absorbed in normal operations.
Administrative Structure	Contract training centrally administered by the Business and Technology Center in the Community Resources and Services Division; 80 percent self-supporting; balance from general revenues.
Administrative Staff	Director spends 80 percent of time on contracts and reports to the divisional vice president. Four coordinators each spend 100 percent of time on contract-training, together with an office manager and three clerical staff.
Marketing	Annual marketing budget, for advertising, is about \$6,000. Most marketing conducted by personal sales calls, professional networking, and repeat business. Targets major employers and growth industries (small business, manufacturing and technology).
Clients	More than 125 contracts annually, with \$1.5 million revenue generated. Seventy percent with business and industry and the other 30 percent with government agencies. Focus is 50 percent on operators and craft workers, 40 percent on technical and professional workers, and 10 percent on middle management.
Programs	Ninety percent noncredit; approximately 50 percent of programs customized. All individual courses.

Faculty Sixty percent of contract-training credit programs are conducted by full-time regular faculty; most noncredit conducted by part-time adjunct faculty.

Program Delivery Seventy percent of credit and 50 percent of noncredit programs held on client's site, balance on campus; half on shared time and 30 percent on client's time. Two-thirds of contract-training is paid for by the client, and one-third by the employee.

Strengths Short response time; flexibility in developing and setting up programs.

Contact L.C. Harris III, Director, Business Development, Business and Technology Center

MOTT COMMUNITY COLLEGE

Flint, Michigan

Public, two-year community college

Enrollment: 14,000

Contract-Training History

Contract-training programs in existence for fourteen years. Initiated by deans of Community Education and Vocational-Technical Education in response to a request from a substantial client; approved by president and board of trustees. Start-up costs absorbed in community-education operations.

Administrative Structure

Centrally administered within Office of Community Education, headed by dean. Contract-training program is auxiliary enterprise under director of Community Education. Totally self-supporting.

Administrative Staff

Director spends 50 percent of effort on marketing contract-training programs; two specialists spend 100 percent each; four program specialists at 80 percent each; five support staff at 40 percent each.

Marketing

Marketing budget limited to two marketing specialists and approx. \$10,000 annually in direct mail efforts (4 mailings per year). Emphasis also on professional networking and "word of mouth." Focus is on medium-size, large organizations and emphasizes grants (industrial-based). Their slogan- "When you've got money, call us" and, "if you need money, we'll help you get it!"

Clients

One hundred contracts/projects generate an annual revenue of \$2.5 million (\$2 mil. in grant activity and \$500,000 in contracts). Business and industry, 75 percent, mostly with large and medium-size organizations; 25 percent with medium-size government agencies. Twenty-five percent of training is for

operators and craft workers; 25 percent for secretarial and clerical workers; 25 percent for first-line supervisors; and 25 percent for technical and professional workers.

Programs

Noncredit programs: 100 percent; all individual courses; 100 percent are customized. Client requests are processed; a definition of the problem is made and a curriculum is designed to meet the needs; proposal, with costs, is presented, and adjustments made to satisfy the client; the program is then delivered.

Faculty

Ninety percent of noncredit contract-training programs are taught by external consultants.

**Program
Delivery**

Noncredit contract-training programs: half held at client's site, half on campus; 95 percent on client's time. Clients pay in full for all programs.

Strengths

Flexibility in delivery of all types of training.

Contact

Scott Jenkins, Dean, Community Education

RIO SALADO COMMUNITY COLLEGE

Phoenix, Arizona

Public, two-year community college

Enrollment: 14,000

Contract-Training History

Contract-training programs in existence for thirteen years. Initiated through the creation of an Industry/Apprenticeship Department; received a grant to expand; approval from president of college; \$60,000 start-up costs for salaries of director and secretary.

Administrative Structure

Has a decentralized administration but still has a central office downtown to handle a few large contracts; opened other offices to better serve entire county; contracts handled by three associate deans with business/industry, prison, and government agency experience; administrative unit has some financial support from college; general guidelines have been established for communication with other units.

Administrative Staff

One associate dean; one director; two clerical support staff.

Marketing

An annual marketing budget of \$80,000. General strategies include flyers, newsletters, but main focus is on personal sales calls and building long-term relations.

Clients

Sixty to seventy contracts annually; total revenue over \$5 million. Sixty percent done with business and industry; 40 percent with government agencies. They promote training at all levels of the organization.

Programs

Noncredit programs 25 percent; credit programs 75 percent. Credit programs: 60 percent individual courses, 30 percent certificates, 10 percent

undergraduate degree credit. Noncredit programs: 90 percent individual courses, 10 percent certificates; most programs are customized.

Faculty

Credit courses taught almost exclusively by adjunct faculty; noncredit courses mostly taught by external consultants, with 30 percent adjunct faculty.

Program Delivery

Credit programs: 90 percent at client's location but on employee time; costs usually shared by client and employee. Noncredit programs: 70 percent at client's location; 90 percent on employee time; costs shared by client and employee.

Strengths

Quality of instruction; ability to serve entire county; willingness to negotiate with industry on their terms.

Contact

Jim Van Dyke, Associate Dean of Instruction

SEATTLE CENTRAL COMMUNITY COLLEGE

Seattle, Washington

Public, two-year community college

Enrollment: Approx. 11,000

Contract-Training History

Contract-training programs in existence for fourteen years. Initiated by chancellor who hired staff to develop contract-training program with support of campus president. Start-up costs estimated at \$25,000.

Administrative Structure

Decentralized administration: vice chancellor for Education and Administration coordinates efforts of campus director of Continuing Education who reports to local dean of instruction. The Continuing Education unit is self-supporting, but the contract-training unit is often not self-supporting.

Administrative Staff

One director spends 50 percent of effort on contract training; one marketing specialist at 30 percent; one program specialist at 100 percent; one support staff at 75 percent.

Marketing

Eight percent of total budget. Strategies focus on direct mail (on a per-program basis). Prospects identified through market analysis and potential program fit. Sends out survey with postcard reply to area businesses.

Clients

Eighty to ninety contracts annually generating a revenue of more than \$1.3 million. Most contract-training programs with business and industry (80 percent), balance with government agencies. Generate \$500,000 in distance learning, \$400,000 in teacher training programs, and remaining \$400,000 in teleconferences and correspondence courses. Trainees consist of middle management (40

percent), operators and craft workers (40 percent), and teachers (20 percent).

Programs

Contract-training programs are all individual courses, half credit, half noncredit. Eighty-five percent are customized. Client requests come to the dean of instruction and respective department chairs are consulted. Faculty is assigned, curriculum is developed, and the contract is negotiated by the director. President reports to campus council and district office.

Faculty

Eight-five percent of noncredit programs and 50 percent of credit programs are taught by external consultants; all others by part-time adjuncts.

**Program
Delivery**

Credit and noncredit: 80 percent of contract-training programs conducted at client's site; 20 percent on campus; 75 percent on shared time, the balance on client's time. All contract-training programs are paid in full by the client.

Strengths

Rich and varied resources; flexible training programs; cost effective.

Contact

Tony Ogilvie, Dean of Continuing Education.

SOUTH SEATTLE COMMUNITY COLLEGE

Seattle, Washington

Public, two-year community college

Enrollment: Approx. 12,000

Contract-Training History

Contract-training programs in existence for fourteen years. Initiated by chancellor who hired staff to develop contract-training program with support of campus president. Start-up costs estimated at \$22,000.

Administrative Structure

Decentralized administration: vice chancellor for Education and Administration coordinates efforts of campus director of Continuing Education who reports to local dean of instruction. The Continuing Education unit is self-supporting, but the contract-training unit is often not self-supporting.

Administrative Staff

One director spends 50 percent of effort on contract training; one marketing specialist at 40 percent; one program specialist at 100 percent; one support staff at 100 percent.

Marketing

Approximately \$50,000 annually. Strategies focus on direct mail efforts (on a per program basis), professional networking, and word of mouth. Prospects identified through market analysis.

Clients

Approximately 35 contracts per year generating a revenue of \$1.8 million. Forty-nine percent of clients are with business and industry; 49 percent with government agencies; and 2 percent with voluntary associations. Trainees consist of 33 percent technical and professional workers, 33 percent first-line supervisors, 33 percent operators and craft workers, and 1 percent middle management. (Seventy percent of all contracts are vocational.)

Programs

Contract-training programs are all individual courses; 60 percent credit, 40 percent noncredit. Seventy percent of programs are customized. Client requests come to the dean of instruction and respective department chairs are consulted. Faculty is assigned, curriculum is developed, and the contract is negotiated by the director. President reports to campus council and district office.

Faculty

Seventy-five percent of noncredit programs and 55 percent of credit programs are taught by external consultants; all others by part-time adjuncts.

**Program
Delivery**

Credit and noncredit: 90 percent of contract-training programs conducted at client's site; 10 percent on campus; 75 percent on shared time, the balance on client's time. All contract-training programs are paid in full by the client.

Strengths

Flexible training programs; cost effective.

Contact

Jeanne Arvidson, Dean of Continuing Education

WESTMORELAND COUNTY COMMUNITY COLLEGE

Youngwood, Pennsylvania

Public, two-year community college

Enrollment: 4,500

Contract-Training History Contract-training programs in existence for twelve years. Initiated by president and dean as outreach and response to requests from industry. Start-up costs about \$10,000.

Administrative Structure Centrally administered by coordinator of the Training Center, who reports to dean of Instructional Services. Totally self-supporting.

Administrative Staff Coordinator of the Training Center spends 100 percent of effort on contract-training programs and has a part-time secretary.

Marketing No marketing budget. Strategies include personal sales calls; some group presentations; and telephone sales. Relies heavily on word of mouth.

Clients Twenty-six contracts bring a revenue of \$100,000. Forty percent with business and industry; 40 percent with government agencies; and 20 percent with voluntary associations. About 75 percent of contracts initiated by the client; about 50 percent with repeat clients. Wide range of trainees: nearly one fourth operators and craft workers; one fourth technical and professional workers; one fourth middle management; and one fourth senior and upper-level management.

Programs Ninety-nine percent of contract-training programs are noncredit certificate programs; 1 percent individual credit courses. Contract-training programs are 100 percent customized.

Faculty

Most of the credit contract-training programs and about half of the noncredit programs are taught by full-time regular faculty; almost all the rest by part-time adjuncts; 10 percent of the noncredit programs taught by external consultants.

**Program
Delivery**

Credit courses principally held on campus; noncredit courses are 25 percent on campus, 75 percent at client's site. Approximately 80 percent of contract-training programs on shared time and only 20 percent on client's time. Ninety percent of contract-training programs paid for by the client, 10 percent by trainee.

Strengths

In-depth knowledge of business and industry; many years of staff experience in industry; knowledge of the businesses within the area; ability to deliver exactly as contracted.

Contact

Dave Sivak, Coordinator, Training Center

STATE UNIVERSITY OF NEW YORK AT ALBANY

Office of Public Service (OPS)
Albany, New York

Public university

Enrollment: 19,000

Contract-Training History

Contract-training programs in existence for fifteen years. Evolved from programming activities of the Division of Continuing Studies at the initiative of the dean and the director of Noncredit Programs. Start-up costs absorbed by existing resources.

Administrative Structure

Administration of contract-training programs is decentralized. The Office of Public Service is under the vice president for University Affairs and provides contract-training programs in the general areas of management of human resources and organizational development. Contract-training programs are about 60 percent self-supporting; state resources for public service, economic development, etc. fund the balance.

Administrative Staff

An associate vice president serves as director and spends 60 percent of time on contract-training program. Five program managers spend 100 percent of effort, with four support staff at 100 percent. One manager is responsible exclusively for curriculum development and proposal writing; others administer design and delivery.

Marketing

Forty thousand annually on marketing budget. Strategies include personal sales calls, group presentations, telephone sales calls, direct mail efforts, newsletters, media releases, advertisements, and contacts with past clients. Focus is on medium-size and large businesses and industry.

Clients	Twenty-five plus contracts per year; annual revenue of \$15 million. Seventy percent of contracts with business and industry; 30 percent with government agencies. Fifty percent of contracts initiated by the clients; 60 percent repeat clients. Almost half of those trained are technical-professional personnel and supervisors.
Programs	Ninety percent noncredit; 70 percent individual courses; the rest certificate programs. Ninety-five percent are customized.
Faculty	Fifty percent of contract-training programs taught by Office of Public Service staff, thirty percent by external consultants, balance by full-time regular faculty.
Program Delivery	Forty percent of contract-training programs at client's site and the rest at other off-campus facilities; 80 percent on client's time, balance on shared or employee time. Ninety-five percent of contract-training programs are paid for by the client; the rest are on a shared basis.
Strengths	Ability to provide custom-designed programs using extensive university faculty expertise.
Contact	Thomas Kinney, Associate Vice President, Office of Public Service

UNIVERSITY OF ARKANSAS AT LITTLE ROCK

Division of Management Services
Little Rock, Arkansas

Four-year state university
Enrollment: 13,000

Contract-Training History

Twenty-eight years ago, state law created an Industrial Research and Extension Center, which was later absorbed by Research and Public Service. Under this umbrella, Lifelong Education and Professional Development was established in 1975 offering off-campus credit courses. Today its many functions include administration of contract-training programs through the Division of Management Services.

Administrative Structure

Contract-training is decentralized. The Division of Management Services offers training through contracts and government grants. It is housed downtown in the local chamber of commerce offices. Operating budget comes from the university. Lifelong Education and Professional Development also oversees credit and noncredit public courses, a conference center with public offerings, and a state-funded labor education program.

Administrative Staff

One director at 50 percent of time; two program specialists at 50 percent; one full-time sales consultant; one support staff at 100 percent.

Marketing

Internal marketing budget of \$30,000 annually. Direct mail pieces are published 3 times a year; professional networking; media releases and advertisements; radio; and approximately 30 presentations a year to special groups. Focus on manufacturing, non-profit, and hospitals.

Clients	Thirty-seven contracts annually; \$200,000 in revenue. Ninety percent of contract-training programs are with business and industry, mostly companies with 100 to 500 employees; 10 percent of contracts with voluntary associations. Seventy-five percent of clients contact the university; 60 percent are repeat clients. Training offered for all levels of employees, primarily first-line supervisors and middle management. Occasionally training is offered free to nonprofit organizations.
Programs	Programs are totally noncredit, all individual courses with certificates. Seventy-five percent of courses are customized.
Faculty	Instructors are not university faculty; state law prohibits faculty to teach overload. Director and staff conduct 70 percent of training; private consultants are also used.
Program Delivery	Thirty percent at client's location; 55 percent at other facility; 15 percent on campus. Ninety percent of courses on client's time; 10 percent shared time with employee. Client pays in full for courses. Training conducted in all parts of state.
Strengths	Long-term commitment to business development in the state; independence from academic units; ability to deliver quality, hands-on training.
Contact	Frank Pipkin, Director, Division of Management Services

UNIVERSITY OF DELAWARE

Newark, Delaware

Private, four-year and graduate research university.
Publicly supported land-grant institution.
Enrollment: 18,500

Contract-Training History Contract-training programs in existence for over 27 years. Began through outreach effort of continuing education as part of institution's land-grant mission; approval from director of Division of Continuing Education, provost, and president.

Administrative Structure Central administration under director, Division of Continuing Education; self-supporting unit of the university; use of classroom space, conference facility on campus, sleeping rooms for participants.

Administrative Staff Director of noncredit programs spends 20 percent of time on contract-training programs; nine program specialists each spend 50 percent; one marketing specialist 20 percent; nine clerical/support staff 50 percent each.

Marketing Fourteen percent of continuing education budget for marketing; all marketing approaches used, but particularly personal sales calls. Also hold three annual breakfasts in which organizations are invited.

Clients Eighty-nine contracts annually; total volume about \$500,000; seventy percent medium-size and large businesses; thirty percent government agencies. University initiates contact for eighty percent of contracts; 60 percent are repeat clients; 70 percent of training for middle management; 30 percent first-line supervisors.

Programs	Ninety percent noncredit; 10 percent credit. 60 percent customized; follow a seven step process for handling client requests.
Faculty	Forty percent of contract-training programs taught by full-time regular faculty; 60 percent by off-campus faculty.
Program Delivery	Eighty-five percent held at client's location and on client's time; client pays in full.
Strengths	Willingness to respond quickly to requests; years of experience in contract-training programs; quality of instruction.
Contact	Jim Broomall, Director, Noncredit Programs, Division of Continuing Education

UNIVERSITY OF GEORGIA

Institute of Government and Georgia Center for Continuing Education
Athens, Georgia

Public, four-year institution
Enrollment: 29,000

Contract-Training History

Contract-training programs in existence for more than 27 years with government agencies. Initiated in 1965 by directors of the Institute of Government and the Georgia Center to encourage university involvement in professional development for state and local governments. Start-up costs of \$15,000.

Administrative Structure

Administration of contract-training is widely decentralized within the university. Georgia Center for Continuing Education screens all proposals for compliance with university policy. Government training is centralized in a unit based in Georgia Center under joint supervision with the Institute of Government. About 50 percent of the costs of contract-training and public offerings in government programs are provided by the university.

Administrative Staff

Director spends 100 percent of effort on contract-training programs; 12 program specialists/instructors average 50 percent of effort, as do seven support staff.

Marketing

A long and continuing association with government groups in the state precludes the need for conventional marketing.

Clients

Twenty-two large contracts annually encompassing 861 programs. Annual gross revenue \$3.5 million. All contracts are with state and local government agencies in Georgia. The

state has mandatory training requirements for employees. Ninety percent of contracts are initiated by the client; 95 percent are repeat clients. Trainees are seventy percent middle management and thirty percent first-line supervisors.

Programs

All programs are noncredit; half are individual programs and half are certificate programs; 100 percent are customized.

Faculty

Seventy-five percent of contract-training instruction provided by full-time professional staff; 25 percent by external consultants.

**Program
Delivery**

Eighty-five percent of contract-training on client's site, balance on campus; 99 percent on client's time. Clients pay in full.

Strengths

University commitment to professional development; full-time professional staff; quick response time; ability to meet local community needs; support of governor, legislature, and statewide professional organizations.

Contact

Harold Holtz, Director of Governmental Training, Georgia Center for Continuing Education

UNIVERSITY OF NEW HAMPSHIRE

Durham, New Hampshire

Four-year state university

Enrollment: 13,300

Contract-Training History

Contract-training programs in existence for fifteen years having developed as an outgrowth of continuing education programs. Initiated through requests from industry; endorsed by director of Division of Continuing Education. Start-up costs \$2,000 to \$3,000. In 1985, the president of the university made a strong commitment to contract-training.

Administrative Structure

Decentralized administration; major effort through Continuing Education. Contract-training programs completely self-supporting; no state or institutional funds.

Administrative Staff

Associate director of the Division of Continuing Education spends 20 percent of time on contract-training programs; marketing specialist 10 percent; program specialist 80 percent; clerical support staff 15 percent.

Marketing

Marketing budget is included in the overall Continuing Education figures. Market analysis done internally and by a public relations agency. All marketing techniques used; continuing education mailings include contract-training program information.

Clients

Fifty contracts annually encompassing 160 programs; \$150,000 revenue generated. Ninety-five percent of contract-training from business and industry; 2.5 percent from government agencies; 2.5 percent from voluntary agencies. Sixty-five percent of contracts initiated by client; 30 percent repeat contracts. Training provided for senior and upper-level

management (20 percent); middle management (50 percent); technical and professional workers (30 percent).

Programs

Noncredit programs are 100 percent of contract-training efforts. All courses listed individually. Eighty percent are customized for the client.

Faculty

Noncredit courses evenly distributed between full-time faculty, adjunct faculty, and external consultants.

**Program
Delivery**

Seventy-five percent of courses held at client's location. Seventy percent on client's time; 15 percent on employee time; 15 percent shared time. Client pays in full for all training.

Strengths

University strengths in training, knowledge base and research, teaching experience. Can offer quality, hands-on programs. Specialized care given to contract-training programs by staff.

Contact

Karina Drumheller, Manager of Training,
Continuing Education

**SCHOOL FOR LIFELONG LEARNING
UNIVERSITY SYSTEM OF NEW HAMPSHIRE**

Center for Organizational and Professional Development
(COPD)
Portsmouth, New Hampshire

Four-year, public university
Enrollment: 2,700

**Contract-Training
History**

Contract-training programs in existence for thirteen years. Initial effort based on needs assessment of communities/regions in the state. Start-up costs included \$20,000 overhead and salary for one director plus part-time clerical support.

**Administrative
Structure**

The Center for Organizational and Professional Development (COPD) acts as the clearinghouse for contract-training program contacts; functions as administrative/academic unit of the School for Lifelong Learning. Unit is fully self-supporting.

**Administrative
Staff**

Director 100 percent of time; program specialist 80 percent; clerical/support staff 50 percent; consultants as needed.

Marketing

No annual marketing budget. Focuses on professional networking.

Clients

Fifteen contracts annually; approximately \$500,000 in revenue. Forty percent of contracts for business and industry; 60 percent for government agencies. Ten percent of contacts made by client; 68 percent repeat clients. Most training is for first-line supervisors, 60 percent; 40 percent for middle management. Focuses on state agencies, Health and Human Services.

Programs

Ninety percent noncredit programs; professional development and specific credit programming. Certificates

offered for all noncredit courses. All noncredit courses are customized; some based on previous courses.

Faculty

Full-time regular faculty 40 percent; 60 percent external consultants.

**Program
Delivery**

Noncredit courses held at client's location 80 percent of the time; 20 percent at other facility off-campus. Ninety percent on client's time; other 10 percent either on employee time or shared. Client pays for all training. A separate charge is added if more than one visit is needed to develop a course.

Strengths

Customization; brokering of programs for regions in state; instructors of high quality.

Contact

Ron Blankenstein, Director, Center for Organizational and Professional Development

UNIVERSITY OF NORTH TEXAS

Professional Development Institute
Denton, Texas

Public, four-year university
Enrollment: 25,000

Contract-Training History

Professional Development Institute (PDI) established in 1973 as a department of the College of Business; developed noncredit professional education for business community, including public and contract-training programs; contract-training programs initiated by the executive director and a faculty member of PDI. No start-up costs involved.

Administrative Structure

Decentralized administration; PDI has no authority on campus for other contracting efforts; functions as a nonprofit unit; offices leased in hotel or on university property; meeting rooms rented as needed; PDI self-supporting.

Administrative Staff

PDI staff consists of two vice presidents less than 50 percent each; three center program coordinators (management, accounting, and large events), marketing specialist 75 percent; six clerical/support staff 60-80 percent each.

Marketing

A marketing budget of \$200,000 annually. Large focus on personal sales calls. Market to 24 states per year using space advertising and direct mail (brochures).

Clients

Seventeen hundred contracts annually; total volume of \$4 million; 95 percent repeat clients; 85 percent contact PDI for training. Train 70 percent technical and professional workers; 20 percent middle management; 10 percent senior and upper-level management. Target groups include CPA candidates

and the petroleum industry.

Programs

All individual noncredit courses; 85 percent on the shelf; willing to tailor in areas of expertise: management, accounting and taxation, computers, and other business subjects.

Faculty

Sixty-five percent full-time faculty, 35 percent external consultants.

**Program
Delivery**

Ninety-five percent held at client's location; 100 percent on client's time; paid for by the client.

Strengths

Specialized programs unavailable elsewhere; high quality of programs; top-rate instructors (who are paid well); energy and initiative of those involved.

Contact

Paden Neeley, President, Professional Development Institute

AMERICAN UNIVERSITY

Office of Contract Programs
Washington, D.C.

Private, four-year institution
Enrollment: 14,000

Contract-Training History

Contract-training programs in existence for 17 years. They began as part of Continuing Education unit. Eleven years ago a separate office was established. Program began as a response to government requests and was originated by the dean of the College of Continuing Education (CE) and a program development specialist. Provost and vice provost for University Programs responsible for approval. No start-up costs in CE; \$40,000 for salaries and operating costs when new office was created.

Administrative Structure

Central administration under director, Office of Contract Programs; self-supporting administrative unit under University Programs with centralized mandate from provost.

Administrative Staff

Six full-time staff spend 100 percent of time on contract-training programs (director, two program specialists, two marketing specialists, one clerical assistant); two part-time staff include one clerical and one project assistant.

Marketing

Annual budget for marketing \$5,000; all approaches used, particularly telephone and personal sales calls; newsletter, newspaper ads, and articles. Strategy is to investigate top companies, match university strengths to companies, and get input from alumni and development.

Clients

Twenty-six contracts annually; total revenue over \$2 million; 50 percent international groups (Eng. Lang., Multi-Cultural, and Computer Science Training); 25 percent business and

industry; 25 government agencies. Office of Contract Programs initiates 95 percent of contacts; 70 percent are repeat clients. Forty percent of training is for middle management; 50 percent for first-line supervisors; 10 percent for senior and upper-level management.

Programs

Sixty percent noncredit, 40 percent credit. Offers degrees and certificates; 30 percent individual courses. Fifty percent customized courses; 100 noncredit, on-the-shelf, professional development courses. Marketing representative acts as liaison between client and academic units for credit courses.

Faculty

Credit courses taught 50 percent by full-time faculty, 50 percent by adjuncts. Noncredit courses: 50 percent full-time, 25 percent adjuncts, 25 percent external consultants.

**Program
Delivery**

Credit courses held at client's location; client pays 75 percent of costs, 25 percent paid by employee. Noncredit courses held 75 percent at client's location and on client's time. Client pays full costs.

Strengths

Cooperative spirit with rest of university; willingness of staff to do anything for client; staff responsible for program and faculty development.

Contact

Cynthia Johnson, Director of Contract Programs

PACE UNIVERSITY

New York, New York

Private, four-year university

Enrollment: Approx. 25,000

Contract-Training History

Contract-training programs in existence for 22 years. Initiated by the president and implemented by the dean of the School of Business. Start-up costs of \$40,000.

Administrative Structure

Contract-training program centrally administered through Office of Corporate Programs (White Plains, New York), a unit of the School of Business. Contract-training program is totally self-supporting.

Administrative Staff

Director, Office of Corporate Programs, reports to dean of the School of Business, and is assisted by a program specialist and secretary; each spends 100 percent of effort on contract-training.

Marketing

No annual marketing budget. Strategies are labor-intensive telephone calls and calls to personal contacts; group presentations; invitations to campus events. Focus is on industries in the corporate arena.

Clients

Twenty-five contract-training programs generating \$1 million annually. Fifty percent of the contracts initiated by clients; fifty percent are repeat clients. Fifty percent of the trainees are middle management; 25 percent are technical and professional workers; 25 percent are senior and upper-level management. Target corporations that offer tuition reimbursement. Seventy percent with business and industry; 30 percent with government agencies.

Programs	Credit programs are 90 percent; noncredit 10 percent. All programs are customized. Client requests are all processed within Office of Corporate Programs. This office also assists faculty, who are approached directly to conduct training.
Faculty	Approximately 90 percent of all contract-training programs are taught by full-time regular faculty; 10 percent by external consultants.
Program Delivery	Fifty percent at client's site; 50 percent on campus. 75 percent on client's time, 20 percent shared time. Training paid in full by client.
Strengths	Autonomous management.
Contact	Danielle Rudes, Corporate Recruiter, Office of Corporate Programs

APPENDIX C:
SAMPLE BREAKEVEN BUDGET

OFFICE OF EXTENDED EDUCATION PROGRAM BUDGET WORKSHEET

Name of Program _____
 Contact Person _____ Phone #: (____) _____
 Type of Program: Conference _____ Contract _____ (____ credit/____ noncredit) Location _____
 Day(s)/Date(s) _____ M _____ T _____ W _____ Th _____ F _____ S _____ Su _____ / ____ / ____ thru ____ / ____ / ____
 Start Time _____ am _____ pm End Time _____ am _____ pm
 Estimated # Paying Participants _____ Account for deposits/invoices _____

I. ESTIMATED DIRECT EXPENSES (add lines A. through K.)

A. FACILITIES-RENTAL _____ Days @ \$ _____/Day
 SUBTOTAL - FACILITIES **A. \$** _____

B. CATERING
 1. Cont. Brkfst. \$ _____/person/day x _____ days x# _____ \$ _____
 2. Lunch \$ _____/person/day x _____ days x# _____ \$ _____
 3. Dinner \$ _____/person/day x _____ days x# _____ \$ _____
 4. Reception \$ _____/person/day x _____ days x# _____ \$ _____
 5. Refr. Breaks \$ _____/person/day x _____ days x# _____ \$ _____
 SUBTOTAL - CATERING **B. \$** _____

C. SPEAKER COSTS
 1. Fees
 Speaker 1 _____
 \$ _____ hon. + \$ _____ travel \$ _____
 Speaker 2 _____
 \$ _____ hon. + \$ _____ travel \$ _____
 Speaker 3 _____
 \$ _____ hon. + \$ _____ travel \$ _____
 2. Meals
 # _____ speakers x \$ _____ x # _____ days \$ _____
 3. Accommodations/Lodging
 # _____ speakers x \$ _____ x # _____ days \$ _____
 4. Packets/Name-tags
 # _____ speakers x \$ _____ \$ _____
 5. Parking
 # _____ speakers x \$ _____ x # _____ days \$ _____
 6. Other _____ \$ _____
 SUBTOTAL - SPEAKER COSTS **C. \$** _____

D. PROMOTIONS/MARKETING
 1. Bulletin Space \$ _____
 2. Advertising \$ _____
 3. Printing \$ _____ flyer + \$ _____ brochure \$ _____
 4. Postage \$ _____ flyer + \$ _____ brochure \$ _____
 5. Other _____ \$ _____
 SUBTOTAL - PROMOTIONAL COSTS **D. \$** _____

E. COMMITTEE EXPENSES
 1. Catering \$ _____
 2. Travel \$ _____
 3. Accommodations \$ _____
 4. Other _____ \$ _____
 SUBTOTAL - COMMITTEE EXPENSES **E. \$** _____

F. PARKING FEES
 \$ _____/hour/person x _____ days x # _____
 SUBTOTAL - PARKING **F. \$** _____

G. AUDIO-VISUAL
 1. Equipment Rental \$ _____
 2. Staff Support
 \$ _____/hour/person x _____ days x # _____ \$ _____
 SUBTOTAL - AUDIO-VISUAL **G. \$** _____

H. REGISTRATION MATERIALS
 1. Packets
 \$ _____/person x # _____ \$ _____
 2. Name-tags
 \$ _____/person x # _____ \$ _____
 SUBTOTAL - REGISTRATION **H. \$** _____

I. SUPPLIES & SERVICES
 1. Signs \$ _____
 2. Supplies \$ _____
 3. Telephone \$ _____
 4. Postage \$ _____
 5. Duplicating \$ _____
 6. Other _____ \$ _____
 SUBTOTAL - SUPPLIES & SERVICES **I. \$** _____

J. SECRETARIAT (STAFF) EXPENSES/REIMBURSEMENTS
 1. State Vehicle/Mileage \$ _____
 2. Lodging/Accommodations \$ _____
 3. Meals \$ _____
 4. Other _____ \$ _____
 SUBTOTAL - SECRETARIAT **J. \$** _____

K. CONTINGENCY/ EMERGENCY
 SUBTOTAL CONTINGENCY/ EMERGENCY **K. \$** _____

▶ **I. TOTAL ESTIMATED DIRECT EXPENSES** \$ _____

II. ESTIMATED INDIRECT EXPENSES

A. CSU Central Administration _____ % Projected Program Revenue \$ _____
 B. OEE Administration \$ _____/person/day x _____ days x # _____ ("all participants paying and guests") \$ _____

▶ **II. TOTAL ESTIMATED INDIRECT EXPENSES** \$ _____

III. ESTIMATED PROGRAM COSTS (add lines I. & II.)

▶ **III. TOTAL ESTIMATED PROGRAM COSTS** \$ _____

IV. ESTIMATED PER PERSON COSTS

▶ **IV. TOTAL EST. COSTS / # PERSONS =** \$ _____/person

V. SUGGESTED PER/ PERSON RATE

▶ \$ _____/person

Date Prepared: _____ By: _____

WHITE- OEE program file

YELLOW- OEE Director

PINK- Coordinator/ Committee

SAMPLE TIMELINE OF ACTIVITY

APPENDIX D:

CONTRACT PROGRAM
March 2, 1995

PROPOSED TIMELINE OF ACTIVITY (SAMPLE)

March 1, 1994	Contract signed
March, 1994	Rooms/space reserved
Fall, 1994	Keynote speaker confirmed
October 5, 1994	Departmental/School Approval
Oct. 15-Dec. 4, 1994	Brochure designed, typeset, pasted-up, printed
November 9, 1994	Prospective exhibitor list compiled
Nov. 26-30, 1994	Speakers confirmed Exhibitor invitations sent
Dec. 4-7, 1994	Brochure mailed/distributed
Dec. 5-Feb. 15, 1995	Registrations accepted
January 18 1995	Assign presidors to sessions Exhibitor table reservation deadline Duplicating/audio visual request deadline Directional signs ordered Sign hangers ordered
February 1, 1995	Catering arrangements made Speaker room assignments made
February 15, 1995	REGISTRATION DEADLINE (P.O.#s must be received by this date) All materials for packet inserts received Credit requirements drafted All duplicating finished, returned
February 11-15, 1995	Catering confirmed Signs printed Space diagrams drawn; arrangements finalized
February 20, 1995	Nametags made; packets stuffed; rosters checked
March 1, 1995	Final details arranged; final AV/room checks
March 2, 1995	CONFERENCE

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