IACET ACCREDITED PROVIDER HANDBOOK

GUIDE TO ADHERING TO THE ANSI/IACET 1-2013 STANDARD FOR THE DEVELOPMENT AND AWARDING OF CONTINUING EDUCATION UNITS FOR ADULT EDUCATION

version 1-2015

BusinessU™

Maximizing Business Engagement

This handbook is provided to managers, administrators, and instructors/coaches who develop, implement, assess, and revise continuing education and training programs offered by Business U, Inc., through its eUniversity. Please refer questions about this handbook to the Education Director.

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June 29, 2015

International Association for
Continuing Education and Training
7918 Jones Branch Drive, Suite 300
McLean, VA 22102

Dear Reviewer,

I am excited to submit this IACET Accredited Provider Handbook as documentation of Business U's
commitment to adult continuing education and training and the policies and procedures by which our
organization ensures adherence with the ANSI/IACET 1-2013 Standard.

We look forward to hosting you for our site review and welcome your feedback. We at Business U aspire
to embody the highest standards for design, delivery, support, and continuous improvement of high-quality
adult learning events as a model IACET Accredited Provider.

Sincerely,

Christine Bosworth, Ed.D.
Co-founder and Chief Education Officer
Business U, Inc.
christine@business-u.net

Accredited Provider Agreement

As an applicant for approval as an IACET Authorized Provider, the Applicant warrants and represents that the party signing on behalf of the Applicant is of legal age and authorized to execute this Agreement and bind the Applicant. Furthermore, the Applicant organization agrees:

1. To fully and accurately complete the application, providing all requested documentation including processes, procedures, and policies for review by the IACET Commission.

2. To provide access to the primary training site to the IACET Site Visitor, including access to inspect all classrooms, facilities, and materials provided to learners or used in the development of learning events.

3. To completely and accurately identify the nature of the organization applying for AP accreditation, including legal status of any groups within the applicant organization who are to be considered as part of the organization and the reporting structure showing how each group is controlled by the individual who is purported to be the person responsible for ensuring the ANSI/IACET 1-2013 Standard is being followed.

4. That the Authorized Provider accreditation strictly prohibits the Applicant organization from approving other providers of continuing education and training learning events or programs for IACET CEUs.

5. To exercise due diligence and provide accurate and truthful information to IACET in all transactions to the best of the Applicant's knowledge and belief.

6. To at all times conduct its operations and learning programs, in an ethical manner that respects the rights and worth of the individuals served by the Applicant and in a manner that reflects favorably on IACET.

7. To provide full and accurate disclosure of information about the Applicant's learning programs, services, and fees in the Applicant's promotions and advertising.

8. To use only the IACET approved statements without any modifications when referencing the Applicant's Authorized Provider accreditation and not make any representations or warranties about or on IACET's behalf.

9. To use only the approved statements in describing the Applicant's relationship with IACET and/or when the Authorized Provider logo is used on continuing education marketing or promotional materials and otherwise comply with any guidelines or measures provided by IACET from time to time with respect to its trademarks, logos, and intellectual property.

10. That at all times relevant to this Agreement, IACET exclusively reserves all rights and licenses not expressly granted herein.

11. To report to IACET, within thirty (30) days, any major organizational or program changes that impact the role and mission of the administrative unit on which accreditation is currently based.

12. If accredited or approved by another agency, to notify IACET within thirty (30) days if the Applicant organization is placed on probation or has its accreditation/approval withdrawn for other than voluntary reasons.

June 28, 2015

Christine Bosworth, Ed.D
Co-founder and Chief Education Officer
Business U, Inc.

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BusinessU

Maximizing Business Engagement

IACET Accredited Provider Handbook

Guide to adhering to the ANSI/IACET 1-2013 Standard for the development and awarding of continuing education units for adult education

version 1-2015

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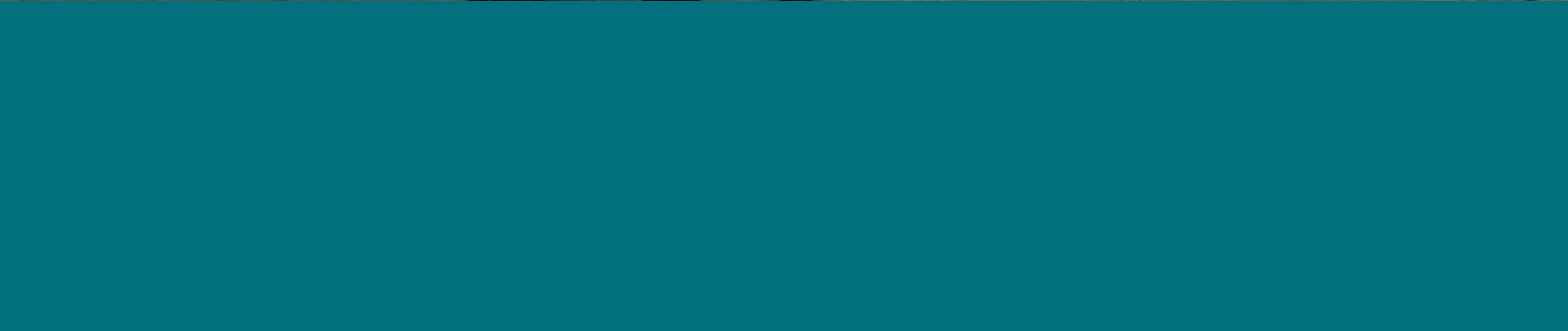
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Business U's learning events move beyond pedagogy to andragogy with an outcome-driven approach designed for immediate and enduring practical value.

DR. CHRISTINE R. BOSWORTH
Co-Founder & Chief Education Officer, Business U, Inc.

INTRODUCTION

BACKGROUND

The Workforce Innovation & Opportunity Act (WIOA), which President Obama signed into law in July of 2014, effectively shined a spotlight on the relationship between the public-facing business services staff of social development organizations and regional employers. Charged with strengthening this relationship, development organization leadership faces a significant challenge to educate, develop, and motivate a business engagement team (BET) that can leverage: (1) best practices in business services to collaborate regionally with employers on workforce, education, and economic development initiatives, and (2) sophisticated technology to manage these collaborative relationships to advance the aims of the organization. In other words, WIOA made social development leadership realize that the front-line personnel—the employees who engage directly with regional businesses—have been neglected in terms of continuing education that could aid in the development and management of these critical relationships.

Business U is dedicated to the education and training of these vital employees so they can work effectively with regional businesses. Business U offers learning events designed specifically for this niche organizational role. The success of Business U's learning events is contingent on three types of evaluation. First, the development organization—the client—must conclude that the learning events contribute to a strengthened relationship among BETs and their regional business counterparts. Second, the BETs must attribute improvement in their cultivation and management of relationships with target businesses to the knowledge and skills gained through their participation in the learning events. Finally, Business U's internal review must demonstrate that the learning events are delivered consistently in accordance with standards that ensure superior quality in education on several levels, which are enumerated later in this document.

Given Business U's mission to help BETs strengthen their relationships with regional businesses and the three types of evaluation necessary for Business U's success, the company has developed a handbook to guide the design, execution, evaluation, and continuous improvement of its learning event offerings. As a prospective Accredited Provider (AP) of the International Association for Continuing Education and Training (IACET), this handbook draws heavily from the ANSI/IACET 1-2013 Standard, which is based on

scholarly educational research. IACET accreditation is recognized internationally as an indicator of an organization's commitment to educational rigor, excellence, and integrity.

The standard unit for measuring learners' professional development is called the continuing education unit (CEU). The CEU was created to provide a consistent unit of measurement for quantifying continuing education and training across a broad variety of providers, activities, and purposes in adult education. The ANSI/IACET 1-2013 Standard provides an international standard for calculating and awarding CEUs across this diverse spectrum. Business U's commitment to adult continuing education and training aligns with the objectives of the IACET CEU.

Therefore, Business U has adopted this standard for all of its learning events.

The following sections describe how Business U has incorporated the ANSI/IACET 1-2013 Standard into its planning, operations, and reporting procedures, and delineates the steps to be taken by Business U administrators, instructor/coaches, and learners to be eligible for IACET Accredited Provider status and maintain adherence for reaccreditation every five years. By way of introduction, the following are responses to common questions from learners about the IACET accreditation, followed by an overview of the categories comprising the ANSI/IACET 1-2013 Standard.

FREQUENTLY ASKED QUESTIONS

What does it mean to be an "accredited provider" of IACET CEUs?

Business U is engaged in a lengthy application process that includes submitting organizational information and event materials, being evaluated during a site visit, and demonstrating the ability and commitment to adhere to the IACET criteria.

What is the benefit of being designated as an "accredited provider"?

While the term "CEU" is not trademarked, not all organizations have an equal commitment to quality in awarding CEUs. IACET seeks to ensure a high level of credibility and accountability from its more than 575 accredited providers. IACET accreditation is a signal that an organization delivers learning events rigorously developed according to an internationally recognized standard for quality.

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What constitutes one CEU?

One CEU equals 10 contact hours of participation in organized continuing education and/or training learning event conducted by a qualified instructor. A contact hour is equivalent to one 60-minute interaction between an instructor/coach and the learner.

What is the minimum period of contact for which a CEU may be awarded?

A CEU cannot be granted for learning events that are less than one hour in length.

Which Business U learning events qualify for IACET CEUs?

Business U has applied for accreditation for the entire organization, so learners can receive credit for all of Business U learning event offerings. CEUs are not available for plenary sessions, exhibit hall presentations, meetings, social events, archived online events, or those sessions that provide participants with information about a particular "product" or program without including measurable learning objectives.

What are the attendance requirements to receive CEU credit(s)?

Each learner will sign a check-in roster at the event. Participants must attend the entire event for which they registered unless they have made prior arrangements with the regional office administering the workshop. For face-to-face events, certificates are prepared in advance of the event but will not be distributed to participants until a completed conference evaluation form and (if applicable) a CEU certification card has been submitted to the instructor or CEU desk at the conclusion of the event. For online events, College Board staff will review participant attendance via the online learning platform. Certificates are awarded after the confirmation of complete attendance. CEUs are not eligible for archived online events.

How will attendance be certified for large, multi-session conferences?

Each IACET CEU-eligible session will have a College Board representative available at the session's conclusion to certify your attendance. At the conclusion of the entire event, you will submit your CEU certification card (provided by the College Board in your registration materials) to the representative. Your attendance will be tabulated and a certificate will be mailed shortly after the event.

Can I register for an event on-site?

While pre-registration allows for the most efficient record processing, on-site registrants will be accepted (space permitting). Attendees who register on-site will also have certificates mailed to them shortly after the conclusion of the event.

How does Business U ensure the quality of instructor/coaches? Does the instructor/coach have any discretion in determining whether CEUs are awarded?

First, Business-U-endorsed consultants will be used, wherever appropriate, for workshops in which CEUs are awarded. When a professional development event would benefit most from a recognized expert in the field, Business U reserves the right to invite guest consultants as presenters. An instructor/coach who determines that a participant has not gained satisfactory knowledge from a particular professional development event may withhold the certificate and inform the appropriate College Board regional office of that decision. Final discretion on awarding CEUs resides with the Chief Education Officer.

How will I know how many CEUs I have earned?

Each certificate will include the number of CEUs earned and the number of contact hours. An historical record for each participant will be kept by Business U for a period of at least seven years.

If you have additional questions regarding CEU awards, please contact christine@business-u.net.

OVERVIEW OF THE ANSI/IACET 1-2013 STANDARD

This section covers the key requirements for Business U continuing education and training courses and introduces the various categories and elements of the ANSI/IACET 1-2013 Standard that define the requirements for program administration. The section describes the process of becoming an IACET Accredited Provider and maintaining adherence with the ANSI/IACET 1-2013 Standard for reaccreditation, responsibility and control requirements, support services, planning and instructional planning, awarding CEUs to learners, and record keeping. The ANSI/IACET 1-2013 Standard is a framework for the development and assessment of continuing education and training programs. To delineate clearly the roles, responsibilities, and protocols for maintaining adherence to these standards across the organization, Business U has established several policies and procedures. Formalization of these organizational norms ensures consistency from person to person, aligning expectations for how the organization's objectives are to be achieved. Uniformity in process and policy also streamlines overall communications and training efforts.

Document Organization

Business U encourages all instructors/coaches, management, and administrators to review the handbook in its entirety every year during the Annual Internal Review period. This document can be read in two ways. The first approach is traditional, beginning with page one, and proceeding in order. This is the best way for individuals who are new to the ANSI/IACET 1-2013 Standard. Alternatively, to verify policies and procedures that apply to various Business U functions on an ad hoc basis, the handbook is cross-referenced with four categories: policy, procedure, tool, and example. Finally, the Annual Internal Review and other IACET materials have been incorporated into Business U's intranet as a corporate resource and procedural tool.

Business U's management has structured the organization according to this framework, and the remainder of this document describes how Business U operates in each of the 10 categories of the ANSI/IACET 1-2013 Standard:

▸ **Continuing Education and Training Organization**

The Provider supports the development, administration and delivery of continuing education and training (CE/T) within the organization.

▸ **Responsibility and Control**

The Provider has assigned responsibility for administering continuing education and training (CE/T) to a specific unit within the organization and periodically reviews its policies and procedures to ensure they continually meet the ANSI/IACET 1-2013 Standard.

▸ **Learning Environment and Support Systems**

An appropriate learning environment and support services for each learning event ensure the achievement of the planned learning outcomes.

▸ **Learning Event Planning**

Learning events are planned on the basis of the results of a needs assessment that identifies the learning needs of a specific audience.

▸ **Learning Outcomes**

Learning event outcomes are planned with a set of clear and specific written statements of intended learning outcomes that address the needs of a specific audience.

▸ **Planning and Instructional Personnel**

Qualified personnel plan and conduct each learning event.

▸ **Content and Instructional Methods**

Content and instructional methods are appropriate for each learning outcome.

▸ **Assessment of Learning Outcomes**

Assessment procedures established during event planning are used to determine whether the learning outcomes have been achieved.

▸ **Awarding CEUs and Maintenance of Learner Records**

The Accredited Provider maintains a record of the CEUs awarded to each learner.

▸ **Program Evaluation**

On completion, each learning event is evaluated for purposes of continuous improvement.

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CATEGORY 1

CONTINUING EDUCATION & TRAINING ORGANIZATION

Business U, Inc., and its eUniversity support the development, administration, and delivery learning events with a mission statement, statement of goals, and other documentation. As mentioned in the introduction, Business U provides learning events to a unique, yet plentiful, population of public-facing business services personnel who are charged with strengthening their relationships with regional businesses in the workforce, education, and economic development sectors. Business U's institutional mission statement is designed to appeal to the target client—the business leadership—who select from among a crowded market of organizations that offer professional development services. Therefore, the learning events are described in the context of meeting the needs of social development leadership through consultative services, including learning events tailored for the development of business engagement personnel.

Business U is a Prospective Accredited Provider of the International Association for Continuing Education and Training (IACET) continuing education unit (CEU). As such, Business U relies on the ANSI/IACET Standard for Continuing Education and Training to support the development, delivery, and continuous improvement of its learning events. For more information, visit http://Business-U.net.

> *Business U creates capacity and sustainability for workforce, education, and economic development organizations through regional business engagement strategies, customer relationship management technology, and professional development learning events to attract businesses as partners (in sector strategies and work-based learning), as customers (with business services), and as funders (to invest and leverage).*

Business U's Chief Education Officer is responsible for the organization's learning events, and focuses on a more specific set of objectives:

> *Business U provides best-in-class learning events for adult public-facing business services employees in workforce development, education, and economic development to help them leverage best practices and innovative technology to (1) assess regional needs in the three areas of focus, (2) strengthen relationships with regional businesses, and (3) promote regional collaboration among complementary organizations with the aim of advancing social development and economic mobility.*

Business U's approach to training is outcome driven and founded on developing learning experiences that have a long-term impact, well beyond the end of learning events. This educational philosophy serves to underpin Business U's instructional design, facilitation activities, and the technical assistance and coaching it provides. Learners in the training sessions are actively engaged in the learning experience starting with interactive onsite learning events, which are supported in Business U's eUniversity by subject matter experts to implement action plans and hone newly attained skills. This provides for immediate value and on-the-job relevance.

This mission statement is featured prominently on the Business U website (http://business-u.net), as well as in printed promotional materials. (See Figures 1 and 2 for evidence of the prominence of the mission statement on the organization website.)

WHAT'S NEXT?

Evidence of compliance with Category 1
Mission Statement
Mission Statement Screenshots

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Mission Statement

Business U, Inc. and its eUniversity specialize in three vertical markets—workforce development, education, and economic development—to help organizations better engage business and industry individually and collectively, resulting in economic growth and student and jobseeker success.

> *Business U creates capacity and sustainability for these verticals through regional business engagement strategies, customer relationship management technology, and professional development learning events designed to help outreach employees attract businesses as partners (in sector strategies and work-based learning), as customers (with business services), and as funders (to invest and leverage).*

Business U is a Prospective Accredited Provider of the International Association for Continuing Education and Training (IACET) continuing education unit (CEU). As such, Business U relies on the ANSI/IACET Standard for Continuing Education and Training to support the development, delivery, and continuous improvement of its learning events. For more information, visit http://Business-U.net.

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References
ANSI/IACET 1-2013 Standard for CE/T 1.1

Mission_Statement_.docx

Figure 1: The landing page for Business U's website features the organization's mission statement

Figure 2: The landing page for Business U's eUniversity prominently displays the organization's mission statement

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CATEGORY 2

RESPONSIBILITY AND CONTROL

2.1 The Provider has a periodic internal review process that ensures adherence to the current ANSI/IACET 1-2013 Standard.

Business U employs a rigorous internal review process to ensure adherence to the current ANSI/IACET 1-2013 Standard. This process is documented through a the completion of the Business U Self-Audit Checklist, which was developed by Business U management using the IACET framework to ensure the quality of all Business U learning events and the consistent application of the ANSI/IACET 1-2013 Standard across all 10 categories and comprising elements. For each learning event, an Instructor/Coach submits a Self-Audit Packet to the Chief Education Officer for review at least two weeks prior to the end of the learning event. The master checklist is completed periodically (usually annually) by the Chief Education Officer no later than the end of September each year to ensure compliance with the ANSI/IACET 1-2013 Standard.

2.2 The Provider has identified the position within the organization that is responsible for conducting the review process that ensures compliance with the ANSI/IACET 1-2013 Standard.

Business U has placed the responsibility for all continuing education and training (CET) with the Chief Education Officer. This position ensures that all procedures for CET are kept up to date and all components of the ANSI/IACET 1-2013 Standard are met by the overall program, as well as each individual learning event that provides continuing education unit (CEU) credits.

2.3 The Provider has a process for calculating CEUs and recording the number of CEUs awarded for each learning event. The Provider shall identify contact time for each learning event, and ensure a systematic process is applied to calculate the number of CEUs awarded. Reassessments shall take place in the event of a major change to the learning event, including content, method of delivery, change in equipment/software, or demographic audience.

The Chief Education Officer is responsible for the determination of allowable and non-allowable activities for CEU credits and is the only staff member at Business U with authority to determine the number

of CEU credits for an event. The Instructor/Coach is expected to provide learners with verbal and/or written feedback on mastery of learner outcomes as represented by the awarding of CEUs during and after the learning event.

Business U abides by the Business U Continuing Education and Training Approval Policy for Awarding CEUs to ensure standard measurement of learners' interactions with Instructor/Coaches. Immediately after the last session of each learning event, CEUs are awarded to all learners who have provided evidence of completion of:

- all half-day sessions of training,
- all learning activities included in the learning event, and
- an evaluation for the learning event.

WHAT'S NEXT?

Evidence of compliance with Category 2

Policy for Awarding CEUs
Process for Awarding CEUs
Chief Education Officer Job Description
Organization Chart
Self-Audit Checklist
Approval Letter
Learning Event CEU Calculation (Training Schedule Worksheet)
Revised Learning Event CEU Calculation

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Continuing Education and Training Approval
Policy for Awarding CEUs

Policy

This policy describes the process by which Business U, Inc., determines learning event eligibility for awarding Continuing Education Units (CEUs) to learning event participants. Business U management developed this policy using the ANSI/IACET 1-2013 Standard.

Purpose

This policy ensures the quality of Business U learning events and consistency in the calculation and awarding of CEUs to learning event participants.

Continuing education and training providers award CEUs to signify successful completion of non-credit programs and courses intended to improve the knowledge and skills of working adults. Among the most common uses of CEUs are to record refresher, transitional, or knowledge improvement accomplishments for professional workers undergoing what is called *continuing professional education.*

The typical CEU represents approximately ten (10) contact hours of experience in a structured continuing education experience (class, seminar, retreat, practicum, self-study, etc.) that is supervised in some way by a qualified continuing education provider.

CEUs are similar in theory to academic credits but differ in two important respects:

1. CEUs are not awarded for academic study and do not represent, or provide, academic credit; and

2. CEUs may be awarded for a variety of experiences in different settings, as long as they are measurable, supervised educational or training experiences with defined starting and ending points.

Responsibilities

Business U has placed the responsibility of calculating and CEUs with the Chief Education Officer.

References

ANSI/IACET 1-2013 Standard for CE/T 2 (2.1, 2.2, and 2.3)

Continuing_Education_and_Training_Approval_Policy.docx

Continuing Education and Training Approval
Process for Awarding CEUs

Process

The Chief Education Officer ensures that each continuing education and training (CE/T) event meets the following:

1. The activity is planned in response to educational needs that have been identified for the target population being trained. *See* Needs Analysis Form.
2. The program/training learning environment and support services are appropriate.
3. Learning outcomes are clear, concise, and written as a part of the planning process.
4. Qualified instructional personnel are involved in planning and instruction.
5. Content and instructional methods are appropriate for the intended learning outcomes of each activity.
6. Participants attend all half-day sessions to be eligible for CEU credits.
7. Participants evaluate the learning activity, event, or program.
8. Evaluations are summarized and analyzed.
9. Participants not successfully completing training are notified, along with their supervisors, in writing with reasons for the decision via email or letter within 15 days after the end of the last day of training.
10. Business U uses the ANSI/IACET 1-2013 Standard for CEU computation:
    a. 1 CEU = 10 hours of learner contact with the content of the learning activity (includes classroom, self-paced instruction, pre/post assignments, and/or homework in support of a learning outcome).
    b. Time duration for a training event is documented and justified by the Provider.
    c. Provider staff members who compute CEUs are trained on the formula and what is allowable.
    d. The formula for classroom events is computed by summing all of the minutes for all activities in a learning event, subtracting time spent on non-allowable activities, dividing by 60 minutes, and dividing again by 10 hours, with the fraction for the last few minutes rounded off to the nearest tenth. If the resulting computation ends in less than .5, round down to 0. If the resulting computation ends in .5 or higher, round up to the nearest whole number.
    e. The formula for distance learning self-paced, or individual work should be based on the same formula as classroom events and established by a pilot program averaging the time required to complete the program or other reasonable method for computing

hours for CEU application. This computation should be reassessed a minimum of once per year to validate the calculation. This reassessment should also take place in the event of a major change to course content, method of delivery, change in equipment/software, or demographic audience.

Once this has been accomplished and prior to the learning event, the Chief Education Officer uses the Event Approval Form to review and approve the following:

1. Needs Analysis for the target population to document the reason for creating the CE/T event
2. Learning outcomes or objectives are established
3. Agenda stipulating instructional methods and assessment for each session
4. A vita for each presenter
5. Statement of how participants will demonstrate their attainment of learning outcomes for each activity
6. Copy of the evaluation to be conducted

The Chief Education Officer completes the Event Approval Form, a copy of which is distributed to the instructor/coach, and the original is placed in the CEU file, along with the Approval Checklist.

Once approved and after the training is complete, a CEU Certification Verification Document with sponsor information is completed and forwarded to learners who have met all requirements to receive CEUs. **The "name" line in the participant information area on the CEU Certification Verification Document must be completed prior to distribution.**

After training is concluded, the Chief Education Officer enters the following in the CEU file:

1. Written tests or other approved learning demonstration completed by learners who received a CEU Certification Verification Document
2. All completed original evaluations
3. The original sign-in sheets for each session

References
ANSI/IACET 1-2013 Standard for CE/T 2 (2.1, 2.2, and 2.3)

Continuing_Education_and_Training_Approval_Process.docx

Chief Education Officer Job Description

Position Overview

The Chief Education Officer provides leadership, vision, motivation, organization, and evaluation to all academic departments, levels, and divisions across and throughout Business U, Inc. This position provides general oversight and ensures consistency of all academic functions across and throughout Business U's learning events. The Chief Education Officer is an executive-level administrator.

Duties and Responsibilities

- Develop and implement educational activities both strategic and operational, including metrics to track and evaluate progress.
- Ensure compliance with Federal and State Department of Education, accreditation, regulations and policies.
- Research and identify trends and needs and establish program directions accordingly.
- Assess quality of program operations. Modify existing program services or create new program offerings to maintain or enhance program standing.
- Set and communicate program priorities and performance standards and assess operations using these criteria.
- Provide for quality assurance reviews and addresses areas in need of attention.
- Monitor attrition analysis and assist with issues relating to retention.
- Coordinate strategies with BU staff to achieve desired organizational results in areas of customer satisfaction, student retention, graduation rates, and satisfactory student progress.
- Provide leadership to ensure learning events maintain satisfactory academic progress in the areas of attendance, grades, matriculation, and graduation.
- Assist in developing and managing the educational budget.
- Facilitate creative changes in educational programming, processes, and procedures.
- Develop business plans and projections for assigned education projects and proposed projects.
- Lead facilitators in program direction, development of goals, and objectives.
- Establish and maintain compliance with academic policy and procedure.
- Oversee:
    - facilitator recruitment
    - orientation
    - course assignments
    - professional development
    - evaluation and curriculum implementation

cedo_description.docx

- control, calculation, and awarding of facilitator performance bonuses

Job Skills and Requirements
- Ph.D. or Ed.D. in a field of education and teaching experience
- Five or more years of management or supervisory experience in an education department
- Experience in a proprietary college a plus
- Orientation toward results
- Ability to multi-task in a fast-paced environment
- An ongoing customer focus
- The highest level of integrity at all times

This is a full time position with a benefits package including medical, dental, vision, short- and long-term disability, PTO paid holidays and 401(k). We are committed to diversity. Business U, Inc., is an Equal Opportunity Employer.

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BusinessU
Maximizing Business Engagement

Christine Bosworth
Co-founder
Chief Education Officer
Business U
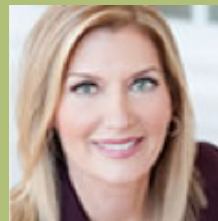
Celina Shands Gradijan
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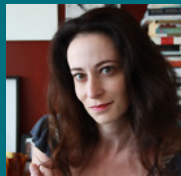
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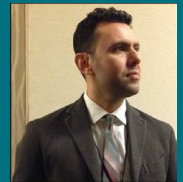
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Kaye McGriff
Coach

Donna Ryals
Coach

Leslie Schneider
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Business U Self-Audit Checklist

The Chief Education Officer uses this checklist to assess your Continuing Education and Training (CE/T) learning event. To ensure the necessary policies, processes, and record-keeping documents are in place to demonstrate compliance with the ANSI/IACET 1-2013 Standard, course developers must complete and submit this form along with the required supporting evidence in an Audit Packet at least two weeks prior to the scheduled Learning Event Evaluation.

Instructions
For each section of this form, please indicate whether the required elements are implemented, communicated, and maintained. Please ensure proper documentation is present in the Audit Packet for review by the Chief Education Officer. Please note that blank templates do not satisfy the documentation requirements; rather, please submit copies of actual, completed documents.

Note
This document is based on the Self-Audit Checklist for the ANSI/IACET 1-2013 Standard, version dated 05/28/13.

Self-Audit Checklist for the ANSI/IACET 1-2013 Standard

Category	Description	Required Evidence	I	C	M	Doc Filename
1: Continuing Education and Training Organization	Provider supports the development, administration and delivery of the training it provides with a mission statement, statement of goals and/or other documentation.	Mission statement or set of specific goals describes intent and commitment to continuing education within the organization overall				
2: Responsibility and Control	Provider has a periodic internal review process that ensures adherence to the current ANSI/IACET 1-2013 Standard.	Completed forms, worksheets, reviews/reports with metrics/data regarding course reviews				
	The position within the organization that is responsible for conducting the review process ensures compliance with the ANSI/IACET 1-2013 Standard.	Job description for position responsible for conducting periodic review process				
		Organizational chart showing position in organization responsible for compliance with ANSI/IACET 1-2013 Standard				
	Provider has a process for calculating CEUs and recording the number of CEUs awarded for each learning event.	Example of actual calculations to determine continuing education unit awarded for completion of a course and evidence of re-calculations for revised courses				
3: Learning Environment and Support Systems	Provider ensures there is an appropriate learning environment, instructional and learning resources for instructors, learners and staff.	Completed worksheets or reports for ensuring reference material is up to date, educational materials are current and accurate, and media and technological resources are maintained and in good working order				

Self-Audit_Checklist_.docx

BU

Category	Description	Required Evidence	I	C	M	Doc Filename
	Provider assesses the learning environment to ensure it supports the achievement of learning outcomes.	Classroom/equipment/IT inspection and maintenance reports				
	Support services are available to instructors and learners to enhance the learning event.	Sample notification to learners regarding minimum technology requirements for participating in a course Communications regarding registration, scheduling, staff/ technical support made available prior to taking a course				
4: Learning Event Planning	Provider has a process for identifying how content is determined, and includes information about how the needs are periodically evaluated to support the currency and relevancy of the learning event content.	Learning event design process worksheets or planning documents				
	Provider documents the relationship between needs analysis and planned learning outcomes.	Needs/audience analysis questionnaires				
	Provider presents complete, accurate and timely information about the learning experience to learners in advance of the learning event.	Course marketing materials, announcements and registration confirmations				
5: Learning Outcomes	Provider has learning outcomes that are clear, specific, and measurable, and that reflect what learners will achieve in each learning event.	Learning event design document				

Self-Audit_Checklist_.docx

Category	Description	Required Evidence	I	C	M	Doc Filename
5: Planning and Instructional Personnel	Individuals involved in the design, development, delivery and evaluation of learning events are qualified to perform their assigned tasks.	Resumes, job descriptions, credential requirements reflecting skills appropriate to assigned roles				
	Provider has a process in place to document individuals' professional development activities for purposes of ensuring those who are involved in the design, development and delivery of learning events remain current in subject matter material and learning methods.	Records of professional development activities				
	Provider has a policy that demonstrates they do not discriminate or make explicit references of a discriminatory nature based on gender, ethnicity, religion, age, disability, socioeconomic status, and/or sexual orientation.	Company/organizational policies for employees regarding professional behavior related to discrimination				
	Provider has a policy that discloses to learners, prior to the start of the learning event, any instructor's proprietary interest in products, instruments, devices, services or materials discussed, as well as the source of any compensation related to the presentation.	Company/organizational policies regarding instructor proprietary interests and source(s) of compensation related to the learning event				

Self-Audit_Checklist_.docx

Category	Description	Required Evidence	I	C	M	Doc Filename
	Provider has a policy that respects intellectual and legal property rights for any material used in its learning events.	Company/organizational policies regarding proprietary interests and intellectual property rights				
7: Content and Instructional Methods	Provider has a process in place to ensure the selected content logically supports the learning outcomes.	Learning event design documents				
	Instructional methods are appropriately matched to achieve the learning outcomes.	Development draft forms or process requirements				
	Instructional methods accommodate multiple learning styles, and that, by their very design, these methods promote interaction between and among learners, instructors and learning resources, to achieve the stated learning outcomes.	Project planner, including dependencies and content review process				
	Instructional delivery includes discussion of learning outcomes and requirements to earn CEUs at the beginning of the learning event.	Subject Matter Expert (SME) reviews/input				
		Verification of Training for Trainers Course/content outline Trainer guides and learner guides demonstrating that learning outcomes are explained at the beginning of the learning event				

Self-Audit_Checklist_.docx

Category	Description	Required Evidence	I	C	M	Doc Filename
8: Assessment of Learning Outcomes	Evidence of the assessment methods used to determine whether learners have achieved each of the planned learning outcomes selected during event planning.	Analysis process/planning tools				
	Assessment methods measure the achievement of learning outcomes.	Learning event design document				
	Provider has a process in place whereby learners are given feedback on their mastery of learning outcomes.	Assessment activity and methodology				
		Communications and methods used to provide feedback to learners regarding mastery of the intended learning outcomes.				
9: Awarding CEUs and Maintaining Learner Records	Provider has a process in place to identify and inform learners if they have met the established criteria for successful completion of each learning event, and if they qualify for CEUs.	Communication regarding completion and failure to complete (with possible remedy)				
	Provider maintains a learner record system, including backup, containing all required information.	LMS and/or hard copies of learners' transcripts				
	Provider has a process to maintain training records and make them available to learners for a minimum of seven (7) years.	Certificates of completion				

Self-Audit_Checklist_.docx

BU

Category	Description	Required Evidence	I	C	M	Doc Filename
	Provider has a policy in place for ensuring the privacy and information security of learners' records.	Written policy regarding information security protocols				
10: Program Evaluation	Provider has a process in place for the systematic evaluation of learning events.	Learning event evaluations which include ratings for instructors' skills				
	Provider conducts timely post-program reviews of the evaluation results, and ensures they are incorporated into a continuous improvement process for learning events.	Summaries of reports, analysis and strategic plans of action/program improvements				
	Provider has a process in place for providing program evaluation results to instructors and other individuals involved in the event planning.	Reports and feedback notes for individual instructors' performance				

Self-Audit_Checklist_.docx

Business U

Maximizing Business Engagement

Effective Date: 10/01/14
Revision Date: 12/03/14
Revision No.: 1
Page No: 2
Approval:

Self-Audit Checklist for the ANSI/IACET 1-2013 Standard

Category	Description	Required Evidence	I	C	M	Doc Filename
1: Continuing Education and Training Organization	Provider supports the development, administration and delivery of the training it provides with a mission statement, statement of goals and/or other documentation.	Mission statement or set of specific goals describes intent and commitment to continuing education within the organization overall	✓	✓	✓	mission.docx
2: Responsibility and Control	Provider has a periodic internal review process that ensures adherence to the current ANSI/IACET 1-2013 Standard.	Completed forms, worksheets, reviews/reports with metrics/data regarding course reviews	✓	✓	✓	review-docs.pdf
	The position within the organization that is responsible for conducting the review process ensures compliance with the ANSI/IACET 1-2013 Standard.	Job description for position responsible for conducting periodic review process	✓	✓	✓	job-descr.pdf
		Organizational chart showing position in organization responsible for compliance with ANSI/IACET 1-2013 Standard	✓	✓	✓	org-chart.pdf
	Provider has a process for calculating CEUs and recording the number of CEUs awarded for each learning event.	Example of actual calculations to determine continuing education unit awarded for completion of a course and evidence of re-calculations for revised courses	✓	✓	✓	worksheet.pdf
3: Learning Environment and Support Systems	Provider ensures there is an appropriate learning environment, instructional and learning resources for instructors, learners and staff.	Completed worksheets or reports for ensuring reference material is up to date, educational materials are current and accurate, and media and technological resources are maintained and in good working order	✓	✓	✓	facility-assessment.pdf

Self-Audit_Checklist_.docx

Category	Description	Required Evidence	I	C	M	Doc Filename
	Provider assesses the learning environment to ensure it supports the achievement of learning outcomes.	Classroom/equipment/IT inspection and maintenance reports	✓	✓	✓	facility-assess.pdf
	Support services are available to instructors and learners to enhance the learning event.	Sample notification to learners regarding minimum technology requirements for participating in a course Communications regarding registration, scheduling, staff/technical support made available prior to taking a course	✓	✓	✓	email2.pdf
I: Learning Event Planning	Provider has a process for identifying how content is determined, and includes information about how the needs are periodically evaluated to support the currency and relevancy of the learning event content.	Learning event design process worksheets or planning documents	✓	✓	✓	LEDO.pdf
	Provider documents the relationship between needs analysis and planned learning outcomes.	Needs/audience analysis questionnaires	✓	✓	✓	CET-needs.pdf
	Provider presents complete, accurate and timely information about the learning experience to learners in advance of the learning event.	Course marketing materials, announcements and registration confirmations	✓	✓	✓	emails3-4.pdf
5: Learning Outcomes	Provider has learning outcomes that are clear, specific, and measurable, and that reflect what learners will achieve in each learning event.	Learning event design document	✓	✓	✓	LEDD.pdf

Self-Audit_Checklist_.docx

Category	Description	Required Evidence	I	C	M	Doc Filename
5: Planning and Instructional Personnel	Individuals involved in the design, development, delivery and evaluation of learning events are qualified to perform their assigned tasks.	Resumes, job descriptions, credential requirements reflecting skills appropriate to assigned roles	✓	✓	✓	resume-pdf
	Provider has a process in place to document individuals' professional development activities for purposes of ensuring those who are involved in the design, development and delivery of learning events remain current in subject matter material and learning methods.	Records of professional development activities	✓	✓	✓	pdp.pdf
	Provider has a policy that demonstrates they do not discriminate or make explicit references of a discriminatory nature based on gender, ethnicity, religion, age, disability, socioeconomic status, and/or sexual orientation.	Company/organizational policies for employees regarding professional behavior related to discrimination	✓	✓	✓	nondiscr. pdf
	Provider has a policy that discloses to learners, prior to the start of the learning event, any instructor's proprietary interest in products, instruments, devices, services or materials discussed, as well as the source of any compensation related to the presentation.	Company/organizational policies regarding instructor proprietary interests and source(s) of compensation related to the learning event	✓	✓	✓	coach-disclose.pd

Self-Audit_Checklist_.docx

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Category	Description	Required Evidence	I	C	M	Doc Filename
	Provider has a policy that respects intellectual and legal property rights for any material used in its learning events.	Company/organizational policies regarding proprietary interests and intellectual property rights	✓	✓	✓	ip-policy.pdf
?: Content and Instructional Methods	Provider has a process in place to ensure the selected content logically supports the learning outcomes.	Learning event design documents	✓	✓	✓	LEDD.pdf
	Instructional methods are appropriately matched to achieve the learning outcomes.	Development draft forms or process requirements	✓	✓	✓	LEDO.pdf
	Instructional methods accommodate multiple learning styles, and that, by their very design, these methods promote interaction between and among learners, instructors and learning resources, to achieve the stated learning outcomes.	Project planner, including dependencies and content review process	✓	✓	✓	planner.pdf
	Instructional delivery includes discussion of learning outcomes and requirements to earn CEUs at the beginning of the learning event.	Subject Matter Expert (SME) reviews/input	✓	✓	✓	guide.pdf slidel.pdf outline.pdf
		Verification of Training for Trainers Course/content outline Trainer guides and learner guides demonstrating that learning outcomes are explained at the beginning of the learning event	✓	✓	✓	

Self-Audit_Checklist_.docx

Category	Description	Required Evidence	I	C	M	Doc Filename
3: Assessment of Learning Outcomes	Evidence of the assessment methods used to determine whether learners have achieved each of the planned learning outcomes selected during event planning.	Analysis process/planning tools	✓	✓	✓	guide.pdf
	Assessment methods measure the achievement of learning outcomes.	Learning event design document	✓	✓	✓	LEDD.pdf
	Provider has a process in place whereby learners are given feedback on their mastery of learning outcomes.	Assessment activity and methodology	✓	✓	✓	assess.pdf
		Communications and methods used to provide feedback to learners regarding mastery of the intended learning outcomes.	✓	✓	✓	eval-email.pdf
9: Awarding CEUs and Maintaining Learner Records	Provider has a process in place to identify and inform learners if they have met the established criteria for successful completion of each learning event, and if they qualify for CEUs.	Communication regarding completion and failure to complete (with possible remedy)	✓	✓	✓	follow-email.pdf
	Provider maintains a learner record system, including backup, containing all required information.	LMS and/or hard copies of learners' transcripts	✓	✓	✓	transcript.pdf
	Provider has a process to maintain training records and make them available to learners for a minimum of seven (7) years.	Certificates of completion	✓	✓	✓	new-certificate.pdf

Self-Audit_Checklist_.docx

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Category	Description	Required Evidence	I C M	Doc Filename
	Provider has a policy in place for ensuring the privacy and information security of learners' records.	Written policy regarding information security protocols	✓ ✓ ✓	learner-privacy.pdf
10: Program Evaluation	Provider has a process in place for the systematic evaluation of learning events.	Learning event evaluations which include ratings for instructors' skills	✓ ✓ ✓	evals.pdf
	Provider conducts timely post-program reviews of the evaluation results, and ensures they are incorporated into a continuous improvement process for learning events.	Summaries of reports, analysis and strategic plans of action/program improvements	✓ ✓ ✓	improve.pdf
	Provider has a process in place for providing program evaluation results to instructors and other individuals involved in the event planning.	Reports and feedback notes for individual instructors' performance	✓ ✓ ✓	coach-email.pdf

Self-Audit_Checklist_.docx

Dear _____:

Congratulations! Dr. Christine Bosworth, Chief Education Officer at Business U, has reviewed your learning event for compliance with the ANSI/IACET 1-2013 Standard, and found that the course is eligible to offer continuing education units (CEUs) under the auspices of Business U and IACET.

[Training Course Title] has met the following ANSI/IACET 1-2013 Standard guidelines:

- The course learning outcomes and methods of measuring performance with respect to these goals are expressed with clarity and detail;
- The instructional content of the training course reinforces the standards set by the course learning outcomes; and
- The course assessment tool sufficiently measures the participants learning and retention of the course and learning outcomes.

Thank you for all the effort and hard work you and your team have done to ensure a sound, learner-centered course. Business U has added the IACET logo and credentials to the final product.

We look forward to working with you and your staff on training development projects.

Sincerely,
TKTKTK, IACET Training Program Manager

Approval_Letter.docx

BU

Training Schedule Worksheet

Please complete this form for each day of your learning event. Completed forms must be submitted to the Chief Academic Officer two weeks prior to the end of the learning event.

Continuing Education Units (CEUs) are equivalent to 10 contact hours of participation in an organized educational experience under responsible sponsorship.

1 CEU = 10 contact hours
.5 CEU = 5 contact hours

Allowable: supervised study, lecture/discussion, group activities, in-class projects, etc.
Non-allowable: unplanned and unsupervised activities such as breaks, introductions, study time, etc.

Learning Event: _____   Total Number of Hours: _____

Time	Activities	Total Allowable Minutes	Total Non-allowable Minutes
Total Time		**Total Allowable Minutes**	**Total Non-allowable Minutes**

For Office Use Only   Calculation of Allowable Time for CEU Eligibility

_____ – _____ = _____
Total Minutes   Total Non-Allowable Minutes   Allowable Minutes

_____ ÷ 60 = _____ ÷ 10 = _____ CEUs
Allowable Minutes   Hours

CEdO Initials: _____

BusinessU
Maximizing Business Engagement

Training Schedule Worksheet

Please complete this form for each day of your learning event. Completed forms must be submitted to the Chief Academic Officer two weeks prior to the end of the learning event.

Continuing Education Units (CEUs) are equivalent to 10 contact hours of participation in an organized educational experience under responsible sponsorship.

1 CEU = 10 contact hours
.5 CEU = 5 contact hours

Allowable: supervised study, lecture/discussion, group activities, in-class projects, etc.
Non-allowable: unplanned and unsupervised activities such as breaks, introductions, study time, etc.

Learning Event: **PILOT: BUSINESS ENGAGEMENT BOOT CAMP** Total Number of Hours: **10**

Time	Activities	Total Allowable Minutes	Total Non-allowable Minutes
9a - 9:15	WELCOME & INTRODUCTIONS		15
9:15 - 9:45	BOOT CAMP OVERVIEW	30	
9:45 - 10:30	MODULE 1: DATA SETS	45	
10:30 - 10:40	MORNING BREAK		10
10:40 - 11:20	MODULE 1 (CONT): DATA SETS	40	
11:20 - 12:20	MODULE 2: BRANDING & PACKAGING	60	
12:20 - 12:50	LUNCH		30
12:50 - 1:35	MODULE 2 (CONT): BRANDING & PKG	45	
1:35 - 2:45	MODULE 3: CONSULTATIVE SELLING	70	
2:45 - 2:55	AFTERNOON BREAK		10
2:55 - 4:20	MODULE 4: B2B STRATEGIES	85	
4:20 - 5	eUNIVERSITY & NEXT STEPS		40
	eUNIVERSITY ONLINE SYNCHRONISTIC #1	60	
	eUNIVERSITY ONLINE SYNCHRONISTIC #2	60	

Total Time	Total Allowable Minutes	Total Non-allowable Minutes
600 MINUTES	**495**	**105**

For Office Use Only	Calculation of Allowable Time for CEU Eligibility

600 − **105** = **495**
Total Minutes   Total Non-Allowable Minutes   Allowable Minutes

495 ÷ 60 = **8.25** ÷ 10 = **0.825** CEUs
Allowable Minutes   Hours

CEO Initials: _____

/Training_Schedule_Worksheet.docx

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Revision Date: 11/14/14
Revision No.: 1
Page No: 1
Approval: ___

Training Schedule Worksheet

Please complete this form for each day of your learning event. Completed forms must be submitted to the Chief Academic Officer two weeks prior to the end of the learning event.

Continuing Education Units (CEUs) are equivalent to 10 contact hours of participation in an organized educational experience under responsible sponsorship.

1 CEU = 10 contact hours
.5 CEU = 5 contact hours

Allowable: supervised study, lecture/discussion, group activities, in-class projects, etc.
Non-allowable: unplanned and unsupervised activities such as breaks, introductions, study time, etc.

Learning Event: _BUSINESS ENGAGEMENT BOOT CAMP_ Total Number of Hours: _9.5_

Time	Activities	Total Allowable Minutes	Total Non-allowable Minutes
9a – 9:30	Welcome, Introductions, eUniversity		30
9:30-10	Boot Camp Overview		30
10 – 10:45	Mod 1: Data Sets	45	
10:45 – 11	Morning Break		15
11 – 11:35	Mod 1 Continued	35	
11:35 – 12:30p	Mod 2: Branding & Packaging	55	
12:30-1	Lunch		30
1 – 1:45	Mod 2 Continued	45	
1:45 – 2:30	Mod 3: Consultative Selling	45	
2:30 – 2:45	Afternoon Break		15
2:45 – 3:15	Mod 3 Continued	30	
3:15 – 4:30	Mod 4: B2B Strategies	45	
4:30 – 5	eUniversity & Next Steps		30
	Live Online Discussion #1	60	
	Live Online Discussion #2	60	

Total Time	Total Allowable Minutes	Total Non-allowable Minutes
570	420	150

For Office Use Only   Calculation of Allowable Time for CEU Eligibility

$$570 \text{ (Total Minutes)} - 150 \text{ (Total Non-Allowable Minutes)} = 420 \text{ (Allowable Minutes)}$$

$$420 \text{ (Allowable Minutes)} \div 60 = 7 \text{ (Hours)} \div 10 = .7 \text{ CEUs}$$

CEdO Initials: _____

/Training_Schedule_Worksheet.docx

CATEGORY 3

LEARNING ENVIRONMENT AND SUPPORT SYSTEMS

3.1 The Provider ensures there is an appropriate learning environment, instructional and learning resources for instructors, learners and staff.

Prior to the start of each fiscal year, the Business U Co-founders, Advisory Board, and senior Instructors/ Coaches to determine human, financial, physical, and technological resource requirements needed to accomplish the organization's mission and support quality programs. Business U provides funding for learners' instructional and reference materials, as well as audio, visual, and/or other aides to enhance learning. Computer and satellite technology and the use of supporting devices and software are integrated into learning events as appropriate.

Business U provides learners with timely notification of minimum technology requirements prior to the start of the learning event. Information about the equipment and/or software is communicated to learners at least two weeks prior to the first day of training via email or announcement letter. In this communication, learners also are made aware of Business U's support services. This information is also available in the learning event listing on the Business U website.

The Chief Education Officer is reponsible for ensuring all learning event resources are current and functional. This is achieved according to the Business U Policy on Resource Currency.

3.2 The Provider assesses the learning environment to ensure it supports the achievement of learning outcomes.

As part of the learning event development process, the Chief Education Officer and senior Instructor/ Coaches review the goals and desired learner outcomes of each learning event to determine the appropriate physical environment requirements. The Chief Education Officer ensures the physical environment requirements are appropriate for the learning event and are conveyed to the Instructor/ Coach so that he or she may secure appropriate facilities prior to a scheduled learning event. The Instructor/Coach completes a Facility Assessment Form as part of the Budget Authorization Packet. In addition to making the arrangements for the learning event location, each Business U Instructor/Coach is expected to arrive 30 minutes prior to the learning event to ensure the facilities and equipment are available and properly arranged to facilitate the learning outcomes.

BU

3.3 Support services are available to instructors and learners to enhance the learning event.

Business U learning events are designed to appeal and adapt to a variety of learning styles, many of which address the communication and support-services needs of learners. Business U provides convenient, efficient, and responsive learner support throughout the learning event. Support staff are put in place no later than the second meeting with management in the planning process for a learning event. Support is available for registration, technical support, responding to questions, and general assistance. Such services may include registration procedures, signage, seating arrangements, audio-visual support, equipment, refreshments, program evaluation, and follow-up communication.

Learners are asked prior to training in the Pre-Learning Event Questionnaire if they need an accommodation. Once this information is received, learners are informed via email or other appropriate means prior to the first day of the learning event how their needs will be met. Support staff are available for each learner requesting an accommodation throughout the learning event and evaluation period. If a learner requests an alternate form of communication, materials will be available in the receiving individual's preferred format (i.e., Braille, large print, audio). Support is available for registration, technical support, responding to questions, completing evaluations, and general learner assistance.

Business U employs a number of forms to inculcate systematic assessment and communication of needs for learning events as a part of a routine learning event development process. The Learning Event Development Outline guides Instructor/Coaches through the assessment of instructional needs and and preparation for conducting the learning event.

WHAT'S NEXT?
Evidence of compliance with Category 3

Learning Event Development Outline
Pre-Learning Event Questionnaire
Policy for Resource Currency
Facility Assessment Checklist
Facility Assessment Checklist Example

Learning Event Development Outline

Please complete this document as part of your learning event application.

Learning Event Title: _____

1. Need: How was the need for this learning event determined? Describe the process by which the need for this class was made known.

2. Goal: In general terms, what is your goal for this class? State the overall goal or purpose you hope to achieve.

3. Learning outcomes: What are your specific objectives? State the learning objectives you want earners to take away from this class.

4. Learning strategies: How will you present your material in this class? Describe the methods or instructional strategies you will use in this class to meet your learning objectives. Describe the materials you will use in this class to meet your learning objectives, such as names of books, videos, and special equipment. Also attach a copy of all handouts you will distribute.

5. Assessment: How will you know if you were successful? Specify the competency demonstration techniques you will use to measure the learners' attainment of the learning outcomes.

6. Learning event evaluation: How will the learners provide feedback for continuous improvement of your learning event? The Business U Learning Event Evaluation Form is available for your use.

It is suggested that you distribute an agenda to the learners at the beginning of the learning event. The agenda should specify each topic to be covered with an approximate time frame for discussion, and should also include any scheduled breaks and/or meal times.

I have attached an agenda to this application. □ YES   □ NO

I plan to prepare an agenda for this class. □ YES   □ NO

Reference
ANSI/IACET 1-2013 Standard Category 6

/Learning_Event_Development_Outline.docx   3

Pre-Learning Event Questionnaire

Learning event surveys help us understand how well Business U education and training activities address the needs and expectations of participants and their managers. Questionnaires can also be used to set expectations and/or help participants prepare to engage in meaningful dialogue prior to the event. Similarly, post-learning event surveys can help us capture feedback as a part of Business U's continuous improvement process. Please consider these questions as an opportunity to describe your baseline satisfaction with various aspects of your work life.

For general questions and comments, please contact Dr. Christine Bosworth, Chief Education Officer, at Christine@businessu.net.

1. Which of the following best describes your functional area? Are you:
   - ☐ Staff Member
   - ☐ Team/Group Manager
   - ☐ Division/Department Director

2. What prompted your participation in this program? What are your primary objectives for this learning event?

3. In general, in what activities are you most interested?
   - ☐ Networking
   - ☐ Sharing ideas from my own experience
   - ☐ Listening to ideas from others
   - ☐ Hearing examples
   - ☐ Interacting with speakers
   - ☐ Learning new techniques
   - ☐ None of the above
   - ☐ Other: _____

4. What is your overall expertise in the learning event topic?
    - ☐ Novice: I am coming to learn more and get my feet wet.
    - ☐ Competent: I have limited experience but hope to learn more.
    - ☐ Proficient: I have considerable experience but would not consider myself an expert.
    - ☐ Expert: I consider myself well versed in the topic and am coming to continue my professional development and share expertise.

5. What is your overall opinion about the pre-event assignments?
    - ☐ Unsatisfactory
    - ☐ Satisfactory
    - ☐ Excellent
    - ☐ I did not review the pre-event assignments

6. Do you have any dietary restrictions?

7. Do you need any other special accommodations?

8. Please write your comments or suggestions for the event organizers.

9. Why do you think this learning event will be beneficial to you? To your organization?

Pre-Learning_Event_Questionnaire

BU

Policy on Resource Currency

Policy

It is the policy of Business U that the Chief Education Officer ensure that all instructional materials and associated technology employed to present and/or otherwise disseminate them are current.

Procedure

1. Annually, the Chief Education Officer distributes an internal email calling for the online submission of a list of all materials and resources (including editions/version information and dates of production/publication) that will be used in learning events in the next 12 months.
2. On receipt of all of the required online submission materials, the Chief Education Officer reviews them to ensure all criteria have been met.
3. The Chief Education Officer maintains a master list of materials and resources to anticipate expenditures for replacement of technology (equipment, software, etc.) and updating of instructional resources such as copyrighted journal articles and textbook and multimedia editions.
4. The Chief Education Officer recommends and authorizes expenditures for replacement and updating of instructional resources.

Reference

ANSI/IACET 1-2013 Standard Category 3

Facility Assessment Checklist

Please complete this form as part of your learning event application packet.

Facility Name	_____
Facility Address	_____
	_____
	_____
Primary Contact Name	_____
Primary Contact Phone Number	_____
Primary Contact Email Address	_____

Please answer the following questions for your evaluation of this facility.

Ease of Access	
How easy is the location to find and get to?	
Is it close to the majority of the participants?	
Is a map available to send to participants?	
Is the facility accessible to individuals with disabilities?	
Is safe, well-lit parking available nearby?	
Is there a fee for parking? If yes, how much?	
Is the facility easily accessible to public transportation?	
Permissible Activity	
Are food and drinks allowed in this facility?	
Does the facility have a no smoking policy?	
Space	
What is the room capacity?	
Which statement best describes the room?	☐ The room is square. ☐ The room is rectangular. ☐ The room is long and narrow. ☐ The room is divided by columns/walls/inserts.
Will audio-visual equipment decrease this space significantly?	
Is extra space available for breakout groups?	
Are adult-size table and chairs available?	
Is the furniture satisfactory?	
What types of tables are available?	Number _____ Shape _____ Dimensions _____
Equipment	
Is there an equipment-use fee?	

/Facility_Assessment_Checklist

BU

Who will be available to help with equipment?			
What is the availability and cost of equipment?	☐ Overhead projector ($)	☐ LCD projector ($)	☐ Computer ($)
	☐ Screen ($)	☐ Whiteboard & markers ($)	☐ VCR/DVD player ($)
	☐ TV (size:) ($)	☐ Podium ($)	☐ Flip chart paper ($)
	☐ Microphone and sound system ($)	☐ Wireless Internet connection ($)	☐ Dongles/cables for laptop connection ($)

Opening and Closing

Who is responsible for opening and closing the facility?
Does someone need to pick up a key before the training?
Who is responsible for setting up the room prior to the learning event?
Is early access to the facility for set up permitted? If so, under what conditions/at what times?

Please initial beside each statement to verify suitability of this facility for your learning event. Your initials signify that you understand all learning event sites and/or classrooms must meet the standards set forth by Business U in accordance with the ANSI/IACET 1-2013 Standard.

The facility is in a convenient location for learners.	_____
The location and classroom are handicapped-accessible for persons with disabilities.	_____
Seating capacity accommodates maximum number of seats allowable per session.	_____
Classrooms are well equipped with adequate lighting.	_____
The classroom is conducive to learning events for adult learners (adult tables, desk chairs, etc.)	_____
Classroom location is clearly marked, controllable and easily accessible.	_____
Location is maintained well, with no signs of disrepair and/or neglect.	_____

Reference

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Facility Assessment Checklist

Please complete this form as part of your learning event application packet.

Facility Name	
Facility Address	3174 W. 6TH STREET ROOM 150 LOS ANGELES, CA 90020
Primary Contact Name	
Primary Contact Phone Number	
Primary Contact Email Address	

Please answer the following questions for your evaluation of this facility.

Ease of Access

How easy is the location to find and get to?	EASY w/ GPS AND PROVIDED INSTRUCTIONS
Is it close to the majority of the participants?	YES
Is a map available to send to participants?	YES
Is the facility accessible to individuals with disabilities?	YES
Is safe, well-lit parking available nearby?	YES
Is there a fee for parking? If yes, how much?	NO
Is the facility easily accessible to public transportation?	YES

Permissible Activity

Are food and drinks allowed in this facility?	YES
Does the facility have a no smoking policy?	YES

Space

What is the room capacity? 35

Which statement best describes the room?

- ☑ The room is square.
- ☐ The room is rectangular.
- ☐ The room is long and narrow.
- ☐ The room is divided by columns/walls/inserts.

Will audio-visual equipment decrease this space significantly? NO, ITS BUILT IN

Is extra space available for breakout groups? YES, SEATING IN COMMON AREA

Are adult-size table and chairs available? YES

Is the furniture satisfactory? YES

What types of tables are available?

Number 10
Shape RECTANGULAR
Dimensions 6×4

Equipment

Is there an equipment-use fee? INCLUDED IN PRICE

/Facility_Assessment_Checklist

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Who will be available to help with equipment? _FACILITY MANAGER_

What is the availability and cost of equipment?

INCLUDED IN PRICE

☐ Overhead projector ($)	☐ LCD projector ($)	☐ Computer ($)
☑ Screen ($)	☐ Whiteboard & markers ($)	☐ VCR/DVD player ($)
☐ TV (size:) ($)	☐ Podium ($)	☑ Flip chart paper ($)
☐ Microphone and sound system ($)	☐ Wireless Internet connection ($)	☑ Dongles/cables for laptop connection ($)

Opening and Closing

Who is responsible for opening and closing the facility? _FACILITY MANAGER_

Does someone need to pick up a key before the training? _NO_

Who is responsible for setting up the room prior to the learning event? _FACILITY MANAGER_

Is early access to the facility for set up permitted? If so, under what conditions/at what times? _YES, 30 MINUTES PRIOR_

Please initial beside each statement to verify suitability of this facility for your learning event. Your initials signify that you understand all learning event sites and/or classrooms must meet the standards set forth by Business U in accordance with ANSI/IACET 1-2013 Standards.

The facility is in a convenient location for learners.	_CB_
The location and classroom are handicapped-accessible for persons with disabilities.	_CB_
Seating capacity accommodates maximum number of seats allowable per session.	_CB_
Classrooms are well equipped with adequate lighting.	_CB_
The classroom is conducive to learning events for adult learners (adult tables, desk chairs, etc.)	_CB_
Classroom location is clearly marked, controllable and easily accessible.	_CB_
Location is maintained well, with no signs of disrepair and/or neglect.	_CB_

Reference
ANSI/IACET 1-2013 Standard Category 8

/Facility_Assessment_Checklist

CATEGORY 4

LEARNING EVENT PLANNING

4.1 The Provider has a process for identifying how content is determined, and includes information about how the needs are periodically evaluated to support the currency and relevancy of the learning event content.

Business U learning events are planned on the basis of the results of a needs assessment, which identifies the learning needs of a specific audience. The organization has a documented process to identify any constraints (e.g., prerequisites, timing, funding availability, legal impediments, instructor availability, geographic location of target, etc.) and/or parameters (e.g., safety, access, target audience, learning needs, etc.) that may affect the development and/or implementation of a learning event.

This process is initiated when the Instructor/Coach completes the Continuing Education & Traning Needs Analysis document and begins to populate the Learning Event Design Outline. These documents guide the Instructor/Coach through the considerations necessary for development and implementation of a successful learning event that adheres to the ANSI/IACET 1-2013 Standard, including budgeting, instructional design, and constraints and parameters for the event.

Business U supports Instructor/Coaches in this process with the Learning Event Guidance for Instructor/Coaches, which delineates the instructional approaches, methods, techniques, and assessments that are appropriate for achieving different types of instructional outcomes. Further, Business U's Learning Event Design Document codifies the information gathered during the Instructor/Coach's needs analysis and identification of parameters.

4.2 The Provider documents the relationship between needs analysis and planned learning outcomes.

A key element of the Learning Event Design Document is the presentation of a needs analysis summary and a description of how the methods and activities selected for the learning event link to the learning outcomes derived from the CET Needs Analysis and Learning Event Development Outline. Thus, the Learning Event Design Document establishes how learners achieve mastery as a result of participation and completion of the learning event.

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4.3 The Provider presents complete, accurate and timely information about the learning experience to learners in advance of the learning event.

Business U draws from the Learning Event Design Document to create promotional material and other communications about its learning events. For example, the Business U Learning Event Catalog provides details on the learning outcomes of each learning event, as well as the types of activities and content that lead to learner mastery. Updates and reiterations occur via email, as well as updates to the Business U website and eUniversity.

WHAT'S NEXT?

Evidence of compliance with Category 4

Learning Event Development Outline

CET Needs Analysis

Learning Event Guide for Instructors/Coaches

Learning Event Catalog

Announcements & Registration Form

Learning Event Development Outline

Please complete this document as part of your learning event application.

Learning Event Title: _____

1. Need: How was the need for this learning event determined? Describe the process by which the need for this class was made known.

2. Goal: In general terms, what is your goal for this class? State the overall goal or purpose you hope to achieve.

3. Learning outcomes: What are your specific objectives? State the learning objectives you want earners to take away from this class.

/InstructorCoach_Profile.docx

4. Learning strategies: How will you present your material in this class? Describe the methods or instructional strategies you will use in this class to meet your learning objectives. Describe the materials you will use in this class to meet your learning objectives, such as names of books, videos, and special equipment. Also attach a copy of all handouts you will distribute.

5. Assessment: How will you know if you were successful? Specify the competency demonstration techniques you will use to measure the learners' attainment of the learning outcomes.

6. Learning event evaluation: How will the learners provide feedback for continuous improvement of your learning event? The Business U Learning Event Evaluation Form is available for your use.

It is suggested that you distribute an agenda to the learners at the beginning of the learning event. The agenda should specify each topic to be covered with an approximate time frame for discussion, and should also include any scheduled breaks and/or meal times.

I have attached an agenda to this application. □ YES   □ NO

I plan to prepare an agenda for this class. □ YES   □ NO

Reference
ANSI/IACET 1-2013 Standard Category 6

/Learning_Event_Development_Outline.docx   3

Continuing Education & Training Needs Analysis

Purpose

The purpose of a Continuing Education & Training Needs Analysis is to justify the development of a learning event before it is designed. A basic needs analysis describes the targeted learner, the learning event, and the rationale for offering the learning event. In other words, on reading this completed document, one should have a good sense of why the learning event is necessary to address an unmet need for a particular audience.

Please submit this form with your CEU Application.

1. Who will make up your training audience?
General description:
Specific description:

> *Example*
> General: Secretarial support staff
> Specific: Secretarial support staff who incorporate photographs in final reports)

2. What type of training do they need?

3. Why do they need this training? (Specific justification for holding the learning event)

> *Example*
> Support staff participants need to incorporate clean, clear photographs in the final reports of the managers they support, i.e., they need to become proficient in the use of "Adobe® Photoshop".

4. What qualifications are required for the instructors? (Include related work experience, educational background, and/or any special licensing required to lead the learning event.)

> *Example*
> Must be an experienced climber, be a degreed safety professional and be licensed by OSHA to teach fall protection and construction safety.

5. What type of training facility will be needed to do this training effectively? (Include seating chart/room configuration drawing, if relevant.)

> *Example*
> A heated/air-conditioned classroom with a bank of eight (8) computers placed in a semicircle facing a large screen. A 9th teaching computer, linked to a Power Point® projector, should be in the center of the semi-circle facing the same screen. Each computer, including the teaching computer, should be equipped with Adobe Photoshop. The instructor and the student will need comfortable chairs placed behind the computers, facing the screen. The instructor can use the screen to teach a step-by-step program to utilize Adobe, while he or she can easily move to the four computers on either side to assist and to check and see if each student is following the program.

Needs Analysis.docx

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6. What type of equipment will be needed to teach this learning event?

7. Describe the teaching methods that will be used over the course of the learning event, as well as the estimated time employing each method.

8. What is the time frame necessary to complete this training? Provide the number of contact hours, days of the week, times, and the start and finish times.

Example
This course will take place over 3 consecutive days, beginning on Monday, September 13, 2010, and ending at noon on Thursday, September 16, 2010. The course begins at 8:00am each day and ends at 5:00pm on Monday, Tuesday, and Wednesday; Thursday, September 16, is a half day. Participants will be dismissed as soon as they complete the final exam.

9. What is the estimated cost of developing this learning event? Provide specific costs.

Needs Analysis.docx

10. Who should be involved in the curriculum design? Be sure to consider who has subject matter expertise, as well as who is an experienced educator.

11. What will you charge per participant to attend and complete this learning event?

12. Where will the training take place?

> *Example*
> A course on Modern Media Practice will be taking place in the Los Angeles area, where the majority of the learners are located. The location selected is adjacent to the new media complex in Santa Monica to reinforce the changes covered in the learning event.

Needs Analysis.docx

13. What will be the business impact? What competencies are critical to business goals? What method(s) measure the business impact of those competencies effectively? Assign a weight to each competency, gather data on current competencies, and determine where performance gaps exist.

Example
A critical core competency for a proofreader is to read quickly, at a speed of approximately 3,000 words per hour. If a specific training's learning outcomes include increasing proofreaders speeds to this amount, then it would translate into proofreading more material in a shorter period of time (if they currently read slower than this amount). Take the current amount of proofreading that is currently achieved, and then measure the impact of the faster proofreading after the training, to determine the business impact.

Needs Analysis.docx

Learning Event Guidance for Instructors/Coaches

All Business U learning events and instructors must satisfy several requirements in order to offer IACET Continuing Education Units (CEUs) to learners. In order to satisfy the ANSI/IACET 1-2013 Standard category items 6.1 and 6.2, Business U must ensure that qualified personnel are involved in planning and conducting each learning event.

Each speaker, instructor/coach, and/or subject matter expert must demonstrate professional development training and competence in the following areas on an annual basis:

- Learning event content and subject material
- Learning event planning and/or facilitation
- Instructional methods and learning processes for adults

Business U is confident that you are an expert in your subject matter and can provide documentation of training in that area. To supplement this documentation, Business U provides this information packet to all individuals involved with the development and implementation of our learning events. Please use the information provided in this packet as you develop your Business U learning events.

Please verify receipt of this information by signing and returning the bottom portion of this page to the Chief Academic Officer.

I have received Business U's Learning Event Guidance for Instructors/Coaches, which is designed to supplement my subject matter expertise and training for use in the development and implementation of Business U learning events.

_____   _____   _____
Name (printed)   Signature   Date

Please return this document within 10 business days to:
> Dr. Christine Bosworth
> Chief Education Officer
> Business U, Inc.
> 10920 Wilshire Blvd. # 150-9111
> Los Angeles, CA 90024

5 principles of teaching adult learners

Deb Peterson, About.com Guide

The teacher of adults has a different job from the one who teaches children. If you're teaching adult students, it's important to understand the five principles of teaching adults. It's important to know how adults learn.

Malcolm Knowles, a pioneer in the study of adult learning, observed that adults learn best when:
1. They understand *why* something is important to know or do
2. They have the freedom to learn in their own way
3. Learning is experiential
4. The time is right for them to learn
5. The process is positive and encouraging

Principle 1: Make Sure Your Adult Students Understand "Why"
Most adult students are in your classroom because they want to be. Some of them are there because they have Continuing Education requirements to keep a certificate current, but most are there because they've chosen to learn something new.

This principle is not about why your students are in your classroom, but about why each thing you teach them is an important part of the learning. I'll use my own pickle-making lesson as an example.

When I learned to make pickles, my teacher and neighbor, Marilyn, explained:
- It's important to soak the cucumbers in ice water over night. This helps make the pickles crisp.
- If you put a towel under the jars in the canner, they won't bounce against each other and break.
- When sterilizing the jars, it's important to fill each at least halfway with water, AND fill the canner they're sitting in with water. Too little water and the towel mentioned in the previous bullet will catch on fire. You know this kind of information comes from experience.

Principle 2: Respect that Your Students Have Different Learning Styles
There are three general learning styles: visual, auditory, and kinesthetic. Visual learners rely on pictures. They love graphs, diagrams, and illustrations. "Show me," is their motto. They often sit in the front of the classroom to avoid visual obstructions and to watch you, the teacher. They want to know what the subject looks like. You can best communicate

with them by providing handouts, writing on the white board, and using phrases like, "Do you see how this works?"

Auditory learners listen carefully to all sounds associated with the learning. "Tell me," is their motto. They will pay close attention to the sound of your voice and all of its subtle messages, and they will actively participate in discussions. You can best communicate with them by speaking clearly, asking questions, and using phrases like, "How does that sound to you?"

Kinesthetic learners need to physically do something to understand it. Their motto is "Let me do it." They trust their feelings and emotions about what they're learning and how you're teaching it. They want to actually touch what they're learning. They are the ones who will get up and help you with role playing. You can best communicate with them by involving volunteers, allowing them to practice what they're learning, and using phrases like, "How do you feel about that?"

Pickle Example: I'm generally a kinesthetic learner. Marilyn talked to me about her pickling process, explaining why she uses the ingredients she does, and showed me how she dips a liquid measuring cup into the hot brine and pours it into the jar using a wide-mouthed funnel, but my greatest learning came when I fumbled through the second jar all by myself.

Most people use all three styles while they're learning, and of course, this is logical since we all have five senses, barring any disabilities, but one style almost always is preferred.

The big question is, "How do you, as the teacher, know which student has which learning style?" Without training in neuro-linguistics, it might be difficult, but conducting a short learning style assessment at the beginning of your class would benefit you *and* the students. This information is as valuable to the student as it is to you.

There are several learning style assessments available online, some better than others. I like the one at Ageless Learner.

Principle 3: Allow Your Students to Experience What They're Learning
Experience can take many forms. Any activity that gets your students involved makes the learning experiential. This includes small group discussions, experiments, role playing, skits, building something at their table or desk, writing or drawing something specific – activity of any kind. Activities also keep people energized, especially activities that involve getting up and moving about.

The other aspect of this principle is honoring the life experiences your students bring to the classroom. Be sure to tap into that wealth of wisdom whenever it's appropriate. You'll have to be a good timekeeper because people can talk for hours when asked for

Learning Event Guidance for Instructors.docx

personal experiences, but the extra facilitation needed will be well worth the gems your students have to share.

Pickle Example: Once Marilyn had shown me how to prepare one jar, she busied herself in the kitchen doing her own thing, close enough to keep an eye on me and to answer my questions, but allowing me the autonomy to go at my own speed. When I made mistakes, she didn't interfere unless I asked. She gave me the space and the time to correct them on my own.

Principle 4: When the Student Is Ready, the Teacher Appears
"When the student is ready, the teacher appears" is a Buddhist proverb packed with wisdom. No matter how hard a teacher tries, if the student isn't ready to learn, chances are good he or she won't. What does this mean for you as a teacher of adults? Luckily, your students are in your classroom because they want to be. They've already determined that the time is right.

It's your job to listen carefully for teaching moments and take advantage of them. When a student says or does something that triggers a topic on your agenda, be flexible and teach it right then. If that would wreak havoc on your schedule, which is often the case, teach a bit about it rather than saying flat out that they'll have to wait until later in the program. By then, you may have lost their interest.

Pickle Example: My mom canned pickles all during my childhood years, but I had no interest in participating, or even in eating them, sadly. Several years ago, I helped Marilyn can pickles, and even then, I was simply helping and not really learning. When I finally started enjoying pickles and planted my own cucumbers, then I was ready to learn, and Marilyn was right there to teach me.

Principle 5: Encourage Your Adult Students
For most adults, being out of the classroom for even a few years can make going back to school intimidating. If they haven't taken a class in decades, it's understandable that they would have some degree of apprehension about what it will be like and how well they'll do. It can be tough to be a rookie when you've been an expert in your field for many, many years. Nobody enjoys feeling foolish.

Your job as a teacher of adult students includes being positive and encouraging. Patience helps too. Give your older students time to respond when you ask a question. They may need a few moments to consider their answer. Recognize the contributions they make, even when small. Give them words of encouragement whenever the opportunity arises. Most adults will rise to your expectations if you're clear about them.
A word of caution here: Being positive and encouraging is not the same as being condescending. Always remember that your students are adults. Speaking to them in the tone of voice you might use with a child is offensive, and the damage can be very difficult

to overcome. Genuine encouragement from one person to another, regardless of age, is a wonderful point of human interaction.

Pickle example: I'm a worrier. I worried about spilling brine all over Marilyn's stove, about dropping the full jars as I lifted them out of the hot bath, about making a mess of her kitchen. Marilyn assured me that spills were easily cleaned up, especially when vinegar was involved since it's used for cleaning anyway! She encouraged me as I gingerly moved boiling hot jars. Throughout the pickle-making process, Marilyn remained calm, unruffled. She paused by me every once in a while to comment, "Oh, don't they look beautiful!"

Because of Marilyn's understanding of how to teach me, her adult student, the art of making dill pickles, I now have the confidence to make them in my own kitchen, and I can't wait for my next batch of cucumbers to be ready.

This is your challenge as a teacher of adults. Beyond teaching your subject, you have the opportunity to inspire confidence and passion in another human being. That kind of teaching changes lives.

Reference
Peterson, D (2011). 5 Principles of Teaching Adults. Retrieved May 24, 2011, from http://adulted.about.com/od/teachers/a/teachingadults.htm

Bloom's Taxonomy of Learning Domains

The Three Types of Learning

There is more than one type of learning. A committee of colleges, led by Benjamin Bloom (1956), identified three domains of educational activities:

- **Cognitive**: mental skills (*Knowledge*)
- **Affective**: growth in feelings or emotional areas (*Attitude*)
- **Psychomotor**: manual or physical skills (*Skills*)

Since the work was produced by higher education, the words tend to be a little bigger than we normally use. Domains can be thought of as categories. Trainers often refer to these three categories as KSA (Knowledge, Skills, and Attitude). This taxonomy of learning behaviors can be thought of as "the goals of the learning process." That is, after a learning episode, the learner should have acquired new skills, knowledge, and/or attitudes.

The committee also produced an elaborate compilation for the cognitive and affective domains, but none for the psychomotor domain. Their explanation for this oversight was that they have little experience in teaching manual skills at the college level (I guess they never thought to check with their sports or drama departments).

This compilation divides the three domains into subdivisions, starting from the simplest behavior to the most complex. The divisions outlined are not absolutes and there are other systems and hierarchies that have been devised in the educational and training world. However, Bloom's taxonomy is easily understood and is probably the most widely applied one in use today.

Cognitive Domain

The cognitive domain (Bloom, 1956) involves knowledge and the development of intellectual skills. This includes the recall or recognition of specific facts, procedural patterns, and concepts that serve in the development of intellectual abilities and skills. There are six major categories, which are listed in order below, starting from the simplest behavior to the most complex. The categories can be thought of as degrees of difficulty. That is, the first ones must normally be mastered before the next ones can take place.

Category	Examples and Key Words
Knowledge: Recall data or information.	**Examples**: Recite a policy. Quote prices from memory to a customer. Knows the safety rules. **Key Words**: defines, describes, identifies, knows, labels, lists, matches, names, outlines, recalls, recognizes, reproduces, selects, states.
Comprehension: Understand the meaning, translation, interpolation, and interpretation of instructions and problems. State a problem in one's own words.	**Examples**: Rewrites the principles of test writing. Explain in one's own words the steps for performing a complex task. Translates an equation into a computer spreadsheet. **Key Words**: comprehends, converts, defends, distinguishes, estimates, explains, extends, generalizes, gives an example, infers, interprets, paraphrases, predicts, rewrites, summarizes, translates.
Application: Use a concept in a new situation or unprompted use of an abstraction. Applies what was learned in the classroom into novel situations in the work place.	**Examples**: Use a manual to calculate an employee's vacation time. Apply laws of statistics to evaluate the reliability of a written test. **Key Words**: applies, changes, computes, constructs, demonstrates, discovers, manipulates, modifies, operates, predicts, prepares, produces, relates, shows, solves, uses.

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Analysis: Separates material or concepts into component parts so that its organizational structure may be understood. Distinguishes between facts and inferences.	**Examples**: Troubleshoot a piece of equipment by using logical deduction. Recognize logical fallacies in reasoning. Gathers information from a department and selects the required tasks for training. **Key Words**: analyzes, breaks down, compares, contrasts, diagrams, deconstructs, differentiates, discriminates, distinguishes, identifies, illustrates, infers, outlines, relates, selects, separates.
Synthesis: Builds a structure or pattern from diverse elements. Put parts together to form a whole, with emphasis on creating a new meaning or structure.	**Examples**: Write a company operations or process manual. Design a machine to perform a specific task. Integrates training from several sources to solve a problem. Revises and process to improve the outcome. **Key Words**: categorizes, combines, compiles, composes, creates, devises, designs, explains, generates, modifies, organizes, plans, rearranges, reconstructs, relates, reorganizes, revises, rewrites, summarizes, tells, writes.
Evaluation: Make judgments about the value of ideas or materials.	**Examples**: Select the most effective solution. Hire the most qualified candidate. Explain and justify a new budget. **Key Words**: appraises, compares, concludes, contrasts, criticizes, critiques, defends, describes, discriminates, evaluates, explains, interprets, justifies, relates, summarizes, supports.

Affective Domain

The affective domain (Krathwohl, Bloom, Masia, 1973) includes the manner in which we deal with things emotionally, such as feelings, values, appreciation, enthusiasms, motivations, and attitudes. The five major categories are listed from the simplest behavior to the most complex:

Category	Example and Key Words (Verbs)
Receiving Phenomena: Awareness, willingness to hear, selected attention.	**Examples**: Listen to others with respect. Listen for and remember the name of newly introduced people. **Key Words**: asks, chooses, describes, follows, gives, holds, identifies, locates, names, points to, selects, sits, erects, replies, uses.
Responding to Phenomena: Active participation on the part of the learners. Attends and reacts to a particular phenomenon. Learning outcomes may emphasize compliance in responding, willingness to respond, or satisfaction in responding (motivation).	**Examples**: Participates in class discussions. Gives a presentation. Questions new ideals, concepts, models, etc. in order to fully understand them. Know the safety rules and practices them. **Key Words**: answers, assists, aids, complies, conforms, discusses, greets, helps, labels, performs, practices, presents, reads, recites, reports, selects, tells, writes.
Valuing: The worth or value a person attaches to a particular object, phenomenon, or behavior. This ranges from simple acceptance to the more complex state of commitment. Valuing is based on the internalization of a set of specified values, while clues to these values are expressed in the learner's overt behavior and are often identifiable.	**Examples**: Demonstrates belief in the democratic process. Is sensitive towards individual and cultural differences (value diversity). Shows the ability to solve problems. Proposes a plan to social improvement and follows through with commitment. Informs management on matters that one feels strongly about. **Key Words**: completes, demonstrates, differentiates, explains, follows, forms, initiates, invites, joins, justifies, proposes, reads, reports, selects, shares, studies, works.

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Organization: Organizes values into priorities by contrasting different values, resolving conflicts between them, and creating an unique value system. The emphasis is on comparing, relating, and synthesizing values.	**Examples**: Recognizes the need for balance between freedom and responsible behavior. Accepts responsibility for one's behavior. Explains the role of systematic planning in solving problems. Accepts professional ethical standards. Creates a life plan in harmony with abilities, interests, and beliefs. Prioritizes time effectively to meet the needs of the organization, family, and self. **Key Words**: adheres, alters, arranges, combines, compares, completes, defends, explains, formulates, generalizes, identifies, integrates, modifies, orders, organizes, prepares, relates, synthesizes.

Psychomotor Domain

The psychomotor domain (Simpson, 1972) includes physical movement, coordination, and use of the motor-skill areas. Development of these skills requires practice and is measured in terms of speed, precision, distance, procedures, or techniques in execution. The seven major categories are listed from the simplest behavior to the most complex:

Category	Example and Key Words (Verbs)
Perception: The ability to use sensory cues to guide motor activity. This ranges from sensory stimulation, through cue selection, to translation.	**Examples**: Detects non-verbal communication cues. Estimate where a ball will land after it is thrown and then moving to the correct location to catch the ball. Adjusts heat of stove to correct temperature by smell and taste of food. Adjusts the height of the forks on a forklift by comparing where the forks are in relation to the pallet. **Key Words**: chooses, describes, detects, differentiates, distinguishes, identifies, isolates, relates, selects.
Set: Readiness to act. It includes mental, physical, and emotional sets. These three sets are dispositions that predetermine a	**Examples**: Knows and acts upon a sequence of steps in a manufacturing process. Recognize one's abilities and limitations.

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person's response to different situations (sometimes called mindsets).	Shows desire to learn a new process (motivation). NOTE: This subdivision of Psychomotor is closely related with the "Responding to phenomena" subdivision of the Affective domain. **Key Words**: begins, displays, explains, moves, proceeds, reacts, shows, states, volunteers.
Guided Response: The early stages in learning a complex skill that includes imitation and trial and error. Adequacy of performance is achieved by practicing.	**Examples**: Performs a mathematical equation as demonstrated. Follows instructions to build a model. Responds hand-signals of instructor while learning to operate a forklift. **Key Words**: copies, traces, follows, react, reproduce, responds
Mechanism: This is the intermediate stage in learning a complex skill. Learned responses have become habitual and the movements can be performed with some confidence and proficiency.	**Examples**: Use a personal computer. Repair a leaking faucet. Drive a car. **Key Words**: assembles, calibrates, constructs, dismantles, displays, fastens, fixes, grinds, heats, manipulates, measures, mends, mixes, organizes, sketches.
Complex Overt Response: The skillful performance of motor acts that involve complex movement patterns. Proficiency is indicated by a quick, accurate, and highly coordinated performance, requiring a minimum of energy. This category includes performing without hesitation, and automatic performance. For example, players are often utter sounds of satisfaction or expletives as soon as they hit a tennis ball or throw a football, because they can tell by the feel of the act what the result will produce.	**Examples**: Maneuvers a car into a tight parallel parking spot. Operates a computer quickly and accurately. Displays competence while playing the piano. **Key Words**: assembles, builds, calibrates, constructs, dismantles, displays, fastens, fixes, grinds, heats, manipulates, measures, mends, mixes, organizes, sketches. NOTE: The Key Words are the same as Mechanism, but will have adverbs or adjectives that indicate that the performance is quicker, better, more accurate, etc.
Adaptation: Skills are well developed and the individual can modify movement patterns to fit special requirements.	**Examples**: Responds effectively to unexpected experiences. Modifies instruction to meet the needs of the learners. Perform a task with a machine that it was not originally intended to do (machine is not damaged and there is no danger in performing the new task). **Key Words**: adapts, alters, changes,

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rearranges, reorganizes, revises, varies.	
Origination: Creating new movement patterns to fit a particular situation or specific problem. Learning outcomes emphasize creativity based upon highly developed skills.	**Examples**: Constructs a new theory. Develops a new and comprehensive training programming. Creates a new gymnastic routine. **Key Words**: arranges, builds, combines, composes, constructs, creates, designs, initiate, makes, originates

Reference

Clark, D. R. (2004), Bloom's Taxonomy of Learning Domains. Retrieved May 24, 2011 from http://www.nwlink.com/~donclark/hrd/bloom.html

Bloom's Revised Taxonomy

Lorin Anderson, a former student of Bloom, revisited the cognitive domain in the learning taxonomy in the mid-90s. Perhaps the two most prominent changes to the taxonomy are:

1. Changing the names in the six categories from noun to verb forms
2. Slight rearrangement (Pohl, 2000)

This new taxonomy reflects a more active form of thinking.

Learning Event Guidance for Instructors.docx

Category	Example and Key Words (Verbs)
Remembering: Recall previous learned information.	**Examples**: Recite a policy. Quote prices from memory to a customer. Knows the safety rules. **Key Words**: defines, describes, identifies, knows, labels, lists, matches, names, outlines, recalls, recognizes, reproduces, selects, states.
Understanding: Comprehending the meaning, translation, interpolation, and interpretation of instructions and problems. State a problem in one's own words.	**Examples**: Rewrites the principles of test writing. Explain in one's own words the steps for performing a complex task. Translates an equation into a computer spreadsheet. **Key Words**: comprehends, converts, defends, distinguishes, estimates, explains, extends, generalizes, gives an example, infers, interprets, paraphrases, predicts, rewrites, summarizes, translates.
Applying: Use a concept in a new situation or unprompted use of an abstraction. Applies what was learned in the classroom into novel situations in the work place.	**Examples**: Use a manual to calculate an employee's vacation time. Apply laws of statistics to evaluate the reliability of a written test. **Key Words**: applies, changes, computes, constructs, demonstrates, discovers, manipulates, modifies, operates, predicts, prepares, produces, relates, shows, solves, uses.

Reference

Clark, D. R. (2004), Bloom's Taxonomy of Learning Domains. Retrieved May 24, 2011 from http://www.nwlink.com/~donclark/hrd/bloom.html

Learning and Instructional Strategies

Learning and instructional strategies determine the approach for achieving the learning objectives and are included in the pre-instructional activities, information presentation, learner activities, testing, and follow-through activities of the learning event. The strategies are usually tied to the needs and interests of students to enhance learning and are based on many types of learning styles (Ekwensi, Moranski, &Townsend-Sweet, 2006).

Thus the learning objectives point you towards the instructional strategies, while the instructional strategies will point you to the medium that will actually deliver the instruction, such as elearning, self-study, classroom, or OJT. However, do not fall into the trap of using only one medium when designing your learning event; use a blended approach.

Although some people use the terms interchangeably, objectives, strategies, and media, all have separate meanings. For example, your learning objective might be "Pull the correct items for a customer order;" the instructional strategies are a demonstration, have a question and answer period, and then receive hands-on practice by actually performing the job, while the media might be a combination of elearning and OJT.

The following *Instructional Strategy Selection Chart* is a general guideline for selecting the learning strategy. It is based on Bloom's Taxonomy (Learning Domains). The matrix generally runs from the passive learning methods (top rows) to the more active participation methods (bottom rows. Bloom's Taxonomy (the right three columns) runs from top to bottom, with the lower level behaviors being on top and the higher behaviors being on the bottom. That is, there is a direct correlation in learning:

- Lower levels of performance can normally be taught using the more passive learning methods.
- Higher levels of performance usually require some sort of action or involvement by the learners.

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Instructional Strategy Selection Chart

Instructional Strategy	Cognitive Domain (Bloom, 1956)	Affective Domain (Krathwohl, Bloom, & Masia, 1973)	Psychomotor Domain (Simpson, 1972)
Lecture, reading, audio/visual, demonstration, or guided observations, question and answer period	1. Knowledge	1. Receiving phenomena	1. Perception 2. Set
Discussions, multimedia CBT, Socratic didactic method, reflection. Activities such as surveys, role playing, case studies, fishbowls, etc.	1. Comprehension 2. Application	3. Responding to phenomena	3. Guided response 4. Mechanism
On-the-Job-Training (OJT), practice by doing (some direction or coaching is required), simulated job settings (to include CBT simulations)	4. Analysis	3. Valuing	5. Complex response
Use in real situations. Also may be trained by using several high level activities coupled with OJT.	5. Synthesis	4. Organize values into priorities	6. Adaptation
Normally developed on own (informal learning) through self-study or learning through mistakes, but mentoring and coaching can speed the process.	6. Evaluation	5. Internalizing values	7. Origination

The chart does not cover all possibilities, but should be helpful for most (e.g., self-study could fall under reading, audio visual, and/or activities, depending on your design.

Reference
Clark, D. R. (2004), Learning Strategies or Instructional Strategies. Retrieved May 24, 2011 from http://www.nwlink.com/~donclark/hrd/strategy.html

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Reengineering Business Engagement

STRATEGY – TECHNOLOGY – PROFESSIONAL DEVELOPMENT

WORKFORCE DEVELOPMENT

EDUCATION

ECONOMIC DEVELOPMENT

MAXIMIZING
BUSINESS ENGAGEMENT

The Workforce Innovation and Opportunity Act (WIOA) emphasizes specific changes to systematically focus workforce investment system stakeholders on the needs of business and industry and to measure success in these areas. Let Business U help you create a high performing regional business engagement team.

"If you want me to engage with you in your services or partner with you in your sector strategies, then please understand my business model before you pick up the phone to call me. One of the biggest mistakes of workforce, education or economic development business services teams is not understanding the necessary processes for building a long-term relationship with a business. Business U's learning events are based on thoughtful curriculum that is validated by business and industry with clear measurable outcomes. I'd highly recommend this innovative methodology for those that want to engage businesses with their work or services."

Phil Blair, Chief Officer,
Manpower San Diego
Author of JobWon!

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Reengineering Business Engagement
About Business U

Business U is the Continuing Education & Training Division of **Full Capacity Marketing, Inc.** (FCM) a national consulting firm that specializes in three vertical markets including workforce development, education, and economic development, to help these organizations better engage business and industry individually and collectively resulting in economic growth.

Business U creates capacity and sustainability for these verticals through regional business engagement strategies, customer relationship management technology, and professional development learning events that result in attracting businesses as a partner (in sector strategies and work-based learning), as a customer (with business services), and as a funder (to invest and leverage).

Our models have been successful because Business U not only understands the regulations and challenges of the public sector, but we have decades of private sector experience in understanding what makes businesses tick, succeed and fail. You need a partner that has a full understanding of private sector business models in order to be successful with maximizing business engagement.

High performing business engagement teams think like a business. This is why our Business U solutions offer the continuum of services to help you run your organization like a business. The turnkey solutions have a regional focus underpinned by the latest legislation including the mandates on third-party evaluation, delivery and performance outcomes.

Business U Learning Events
Maximizing Business Engagement

Workforce, education and economic development organizations have team members that need to interface with business and industry to engage them as a partner (in sector strategies and work-based learning), as a customer (with business services), and as a funder (to invest and leverage). Business U's approach to training is outcome driven and founded on developing learning experiences that have a long-term impact, well beyond the end of learning events. This educational philosophy serves to underpin Business U's instructional design, facilitation activities and the technical assistance and coaching it provides. Participants in the training sessions are actively engaged in the learning experience starting with interactive onsite learning events that are then supported in our eUniversity with our subject matter experts to implement action plans and hone newly attained skills. This provides for immediate value and relevance to their job.

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B2B Engage CRM Tool
Manage, Monitor & Measure Business Engagement

Business U's CRM (customer relationship management) technology, B2B Engage, is a cost-effective, cloud-based customized tool developed specifically for workforce, economic development and education stakeholders. Because we've spent years in the field with these stakeholders building successful models in engaging business and industry, we've designed the technology with both you in mind as well as the business customer. B2B Engage automates workflow processes for sector strategies, work-based learning and business services, as well as outreach and campaigns and reports to measure business engagement.

Business U Certified Trainers
Train the Trainer

Business U's Certified Trainer program has been designed to benefit individuals who are tasked with delivering training to, or manage, business-facing staff within workforce, education, and economic development organizations. This is a high impact, two-day course delivered onsite that links outcomes to continuous improvement, a process that is essential for sustainability and maximizing staff potential.

What makes Business U's Train-the-Trainer model unique is that the Trainer is assigned a subject matter expert to co-facilitate a highly specialized business engagement training topic, and that all trainer and trainee actions occurring at Business U's eUniversity is monitored and measured and thus the training actions are reportable and available to the trainer's organization.

Strategic Business Engagement Plans
Creating the Ideal State

A market responsive business engagement team is one that is able to respond to regional market needs with a portfolio of offerings for businesses that is relevant in all business cycles—downsizing, stable, and growth—within an environment of continuous process improvement. Business U's Market Responsive Readiness Assessment provides a baseline score of the cultural and organizational readiness of an organization that supports a market responsive business engagement team.It evaluates the current state of both the culture and leadership, along with operations to determine how close the organization is to an **ideal state**, and provides valuable information to develop a comprehensive strategic Business Engagement Plan that aligns

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Learning Events Overview
Flexible Options

All Learning Events can be delivered to an individual organization or to regional teams in education, workforce, and economic development.

1 **Boot Camp**

2 **Intensive Training**

- Effective Operational Processes for a Market Responsive Business Engagement Team

- Engaging Businesses Using Consultative Selling

- B2B Communications Using Technology & Social Media

3 **Regional Leadership for Business Services**

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Boot Camp
Maximizing Business Engagement Overview

Delivered in a one-day (8-hour), onsite format followed by two (2) hours of coaching in our **eUniversity**. This learning event trains participants in Business U's market responsive, customer-centric framework needed to reengineer your employer/business engagement team, and includes training materials and toolkit, plus an Implementation Webinar with Live Chat Coaching to ensure all training materials are fully understood and implemented.

Topics include:

- Establishing the Right Data Sets for Business Engagement & Services
- Branding & Packaging
- Consultative Selling Processes
- Using Technology for B2B Outreach

Outcomes:

Upon the completion of this learning event, participants will be able to:

- Identify the components of a market responsive business engagement team.
- Create a list of key data points needed for business engagement outreach.
- Apply a communication platform formula by developing three key "message points" to engage businesses.
- Differentiate the three main differences between a "solutions" and a "show and tell" selling approach.
- Examine five technology strategies that are best used for engaging business as a customer or partner.

INTENSIVE

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Business Engagement Intensive Training
Developing a Strategic Business Engagement Plan

Delivered in a three-day (8 hours a day/24 hours), onsite format followed by seven (7) hours of coaching in our **eUniversity**. This learning event starts with an **in-depth evaluation** of the organization's current leadership culture and employer/business engagement team operations that informs Business U's subject matter experts to tailor the onsite learning event to an organization's specific needs. The intensive training supports participants in developing a **Strategic Business Engagement Plan**.

OPERATIONS

DAY 1:
Effective Operational Processes for a Market Responsive Business Engagement Team

In this first day session, Business U's Master Black Belt in Lean Six Sigma works hands on with the Leadership and Business Engagement teams to map current state processes of the operational structure, and then fine-tunes them to avoid duplication and redundancy. The end result is an operational structure that is responsive to the market needs of business and industry.

Outcomes:

Upon the completion of this learning event, participants will be able to:

- Identify the key elements needed to implement an effective continuous process improvement plan.
- Design a process map that includes the required elements in a high performing market responsive business engagement team.
- Produce a SIPOC chart to create the correct internal processes for a market responsive business engagement team.

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OUTREACH

DAY 2:
Engaging Business Using Consultative Selling

During this second day session, participants build systems for prospecting, conduct one-to-one outreach through a tailored needs assessment based on the organization's service mix, and practice consultative selling techniques to match appropriate solutions for business engagement. Additionally, participants are trained to design an expanded business services portfolio that builds on the regional assets of economic development, education and workforce service offerings, and deliver it through a needs assessment that pinpoints key challenges.

Outcomes:

Upon the completion of this learning event, participants will be able to:

- Identify psychographic data points that provide objective details about key motivators to move a business or employer to take action with a workforce, education or economic development organization.
- Demonstrate the five-step approach to engage an employer as a customer or partner effectively.
- Differentiate the main differences between a "solutions" and a "show and tell" selling approach.
- Describe the three elements required in a market-responsive regional business engagement portfolio.
- Map regional assets and services to effectively broaden a business engagement portfolio.
- Design a needs assessment with the required elements to identify key challenges and solutions to build sustainable relationships.

B2B

DAY 3:
Strategic Communications Using Technology & Social Media

Effectively engaging business and building a brand that attracts new prospects requires the development of a strategic communications plan (SCP) that delivers tailored messaging, and speaks the language of business and industry. This third day session provides a systematic process for developing a SCP using an outcomes-based template for designing strategies and internal processes that prepare organizations for a variety of communication scenarios that most will encounter out in the field. Tailored messaging strategies and targeted eMarketing campaigns are introduced to harness the power of technology and social media.

Outcomes:

Upon the completion of this learning event, participants will be able to:
- Identify essential communication tools to engage businesses successfully.
- Apply a communication platform formula by developing key "message points" to engage businesses.
- Develop a comprehensive outreach plan that contains five key parts: market segment, communication medium, communication message, frequency of communication, and in-process metrics.
- Produce a business engagement scorecard that measures the impact of the strategic communications plan.
- Explain the appropriate result-measures that monitor the four areas of market position: brand awareness, brand comprehension, brand equity, and market penetration.
- Examine social media strategies that are best used for engaging business as a customer or partner.
- Understand how to deploy, monitor, and measure a B2B outreach campaign.

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Regional Leadership for Business Engagement
Successful Execution for Regional Networks

Delivered in a one-day (8-hour), onsite format followed by two (2) hours of coaching in our **eUniversity**. To develop an effective market responsive network of partners that align with a common vision in serving business and industry, regional leadership must create a collective narrative, build consensus, institutionalize innovation, and lead systematic change to meet the needs of business and industry and to support economic growth. This learning event is targeted for an organization's leadership team, its board members and executive staff, and provides data-driven tools and strategies to maximize business engagement within regional public and private sector partnerships.

Outcomes:

Upon the completion of this learning event, participants will be able to:

- Identify regional strategies that enhance communication, coordination, and the collaborative alignment of education, workforce, and economic development.
- Find common ground among education, workforce, and economic development missions and central goals to establish collective initiatives to prevent the splintering of collaborative efforts.
- Coordinate a systematic regional approach to maximize sustainable business engagement.
- Implement systematic change to increase the capacity and coordination of regional partners to engage the business community.
- Lead efforts to engage a diverse range of businesses to develop effective linkages with regional partners that support economic growth of a region.
- Identify regional venture philanthropies to accelerate the growth and spread of the regional agenda.
- Use performance accountability data to measure collective impact on business services initiatives.

MARKET READINESS ASESSMENT

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Market Responsive Readiness Assessment Pinpointing Challenges & Opportunities

A market responsive business engagement team is one that is able to respond to regional market needs with a portfolio of offerings for businesses that is relevant in all business cycles —downsizing, stable, and growth— within an environment of continuous process improvement. The results maximize engagement of businesses as a partner (in sector strategies and work-based learning), as a customer (with business services), and as a funder (to invest and leverage).

Business U's Market Responsive Readiness Assessment provides a baseline score of the cultural and organizational readiness of an organization that supports a market responsive business engagement team. It evaluates the current state of both the culture and leadership, along with operations to determine how close the organization is to an ideal state.

SEE NEXT PAGE FOR SCORE SCALE »

Contact us now to get started on your Market Responsive Assessment and Business Engagement Plan to successfully implement the necessary Learning Events for an effective Business Engagement Team.

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Market Responsive Readiness Assessment

Cultural Readiness Score

The organization has created an environment among staff and partners that supports a market responsive business engagement team.

100

Culturally Responsive

The organization demonstrates a high level of strategic readiness but may not have the operational tools or staff expertise in place to respond to and engage business and industry.

Market Responsive

The organization demonstrates both a significant level of cultural readiness and has advanced staff skills, tools, and processes in place to engage and respond effectively to the needs of business and industry.

0 – 100

Supply-Side Responsive

The organization is focused on meeting the needs of job seekers or students; very little focus has been placed on understanding the market and responding to the needs of business and industry.

Operationally Responsive

The organization has developed tools and infrastructure that enable staff to engage business and industry; however there is an overall lack of strategic direction and/or competing priorities.

0

Operational Readiness Score

The organization has staff, technology, and resources in place to enable a market responsive business engagement team.

Score Scale

0 - 25: The organization needs substantial planning with its leadership and board to define the vision for becoming a market responsive organization.

26 - 50: The organization has some focus on becoming market responsive but needs better connection between its overall strategies and its operational structures.

51 – 74: The organization has taken significant steps in becoming market responsive but should carefully examine gaps that may exist between its organizational culture and its operational structures.

75 – 100: The organization has achieved strong alignment of its cultural and operational responsiveness in engaging business and industry and is considered to be market responsive.

CRM

B2BEngage

Manage · Monitor · Measure

Business U's CRM (customer relationship management) Technology, B2B Engage is a cost-effective, cloud-based customized tool developed specifically for workforce, economic development and education stakeholders. B2B Engage automates work in four key areas including 1) sector strategy management, 2) workflows among those that interface with businesses; 3) sector and business engagement metrics and reports; and 4) outreach campaigns and communications to business and industry. Because we've spent years in the field with these stakeholders building successful models in engaging business and industry, we've designed the technology with both you in mind as well as the business customer.

Sector Management

High Growth Sector Strategy Management
Regional Service Networks for Business & Industry
Partner Engagement Tools
Data & Research Integration
Partner Communication

Business Engagement Automation

Metrics & Reporting

Service Metrics Automatically Generated
Customer Survey Tools
Business Engagement Reports
Measure High Growth Sector Outcomes

Workflow & Operations

Coordinated Workflow Processes
Management of Business Contacts
Integrated Needs Assessment
Notification of Missed Deadlines
Instant Chat with Team Members
Integrated Email

Outreach & Campaigns

B2B Outreach Strategies Fully Integrated
Automated Lead Generation Forms for Website
Automatic Alerts and Look-ups for Website Traffic
Customized Newsletter Templates

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CertifiedTrainer
Train the Trainer

Business U's Certified Trainer program has been designed to benefit individuals who are tasked with delivering training to, or manage, business-facing staff within workforce, education, and economic development organizations. This is a high impact, two-day course delivered onsite that links outcomes to continuous improvement, a process that is essential for sustainability and maximizing staff potential.

Professional development is critical to a high performing organization, therefore we can't expect a participant to go through a learning event and make immediate changes on the job. There has to be a common purpose and vision that is shared with the trainers that also resonates with the business facing staff, so our model involves both onsite training and then followed-up with online coaching at Business U's eUniversity.

What makes Business U's Train-the-Trainer model unique is that the Trainer is assigned a subject matter expert to co-facilitate a highly specialized business engagement training topic, and that all trainer and trainee actions occurring at Business U's eUniversity is monitored and measured and thus the training actions are reportable and available to the trainer's organization.

Day 1 Onsite: Trainer

○ **Adult Learning**
Principles & Characteristics

○ **eLearning**
Presence & Retention

○ **Business Engagement**
Practitioner Role

○ **Purpose & Assessment**

○ **Planning & Preparation**

○ **Presentation & Facilitation**

○ **Performance & Evaluation**

○ **Continuous Improvement**

Day 1: is focused on all aspects of a trainers' responsibilities, roles, and the understating of adult learning principles and characteristics, and as importantly, the role of a business engagement practitioner…his/her challenges and the support they will need to be successful. Trainers also learn on the first day how to navigate the online classroom, and gain access to business engagement resources and the necessary templates and report functions to implement an elearning training session.

Day 2 Onsite: Trainer

○ **Business Engagement Overview**

○ **B2B Strategies**

○ **Data Sets for Business Engagement**

○ **Business Services through Regional Partners**

○ **Communications Plan and Scorecard**

○ **Consultative Selling**

○ **Market Penetration Using Technology and Social Media**

Day 2: will focus on how to co-facilitate a learning event with a subject matter expert at Business U's eUniversity as well as go through a modified business engagement Boot Camp. Figure 1 provides an example of the training topics the trainers will be exposed to during the second day of training to familiarize them with business engagement activities.

Included in the Train-the-Trainer two-day learning event:

- 16 hours of onsite training with two facilitators
- 4 hours of live coaching at Business U's eUniversity with subject matter experts
- Business engagement Train-the-Trainer toolkit
- Technical support
- Continental breakfast and lunch

Contact Dr. Christine Bosworth to customize a Train-the-Trainer event package and to learn more about program costs for your organization or regional teams at: **Christine@business-u.net** or 310-800-3353.

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IACET Accreditation

Any organization can host a learning event. But in the world of high quality continuing education and training, it takes true commitment to go through a rigorous accreditation process to meet international standards that have been fully vetted and proven. Business U has that commitment, and as a Prospective Authorized Provider (AP) of the International Association for Continuing Education and Training (IACET), we want our training participants to get the maximum return on investment.

IACET stands for "best in class," and is the organization that created the original Continuing Education Unit (CEU). IACET uses the **ANSI/IACET Standard for Continuing Education and Training**, which is based on in-depth research on the learning process and includes a nationwide network of experts to help companies, associations, government agencies and other continuing education and training providers develop a framework for continuous improvement and a superior learning experience.

The ANSI/IACET Standard focuses on how continuing education and training programs are developed and measures Business U's training programs across ten nationally recognized categories: 1) Continuing Education & Training Organization; 2) Responsibility and Control; 3) Learning Environment and Support Systems; 4) Learning Event Planning; 5) Learning Outcomes; 6) Planning and Instructional Personnel; 7) Content and Instructional Methods; 8) Assessment of Learning Outcomes; 9) Awarding CEUs and Maintenance of Learner Records; and 10) Program Evaluation.

The American National Standard Institute (ANSI) recognizes the IACET Standard as the American National Standard for Continuing Education and Training. The ANSI/IACET 1-2013 Standard requires a systems approach to continuing education and that each of the standard categories, listed above, be controlled within Business U's management structure as an integral part of operating an accredited continuing education and training department or program.

IACET

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Pricing & Funding Procurement

Individual pricing for Business U learning events is based on the number of participants in each class. You can enroll a maximum of 25 participants in Boot Camp and in Intensive Training.

Boot Camp: If you have the maximum allowed participants (25) attending, the cost is $359 per person. If you only have 20 participants attending, the cost is $448.75 per person; if only 15 participants are attending, the cost is $598 per person. The Boot Camp learning event package includes:

- 8 hours onsite training with two facilitators
- 2 hours of live chat coaching at Business U's eUniversity with subject matter experts
- Business engagement toolkit
- Technical support during training
- Continental breakfast and lunch

Three-day Intensive Training: If you have the maximum allowed participants (25) attending, the cost is $1077 per person. If you only have 20 participants attending, the cost is $1,346 per person; if only 15 participants are attending, the cost is $1,795 per person.

- Market Responsive Assessment & Report
- 24 hours of onsite training with three facilitators
- 7 hours of live coaching at Business U's eUniversity with subject matter experts
- Business engagement toolkit
- Technical support during training
- Continental breakfast and lunch

Regional Leadership for Business Engagement: If you have the maximum allowed participants (25) attending, the cost is $359 per person. If you only have 20 participants attending, the cost is $448.75 per person; if only 15 participants are attending, the cost is $598 per person. The Boot Camp learning event package includes:

- 8 hours onsite training with two facilitators
- 2 hours of live chat coaching at Business U's eUniversity with subject matter experts
- Business engagement toolkit
- Technical support during training
- Continental breakfast and lunch

Contact Dr. Christine Bosworth to customize a learning event package and to learn more about program costs for your organization or regional teams at **christine@business-u.net** or 310-800-3353.

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Resources and Tools

Download free tools and white papers at **www.business-u.net**

- Business U eMagazine – Why Regional Collaborations Work
- Download White Paper: Qualitative Analysis of California Workforce Organizations Business Services.
- Download White Paper: Reengineering Workforce Business Services.

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MEET OUR ADVISORY BOARD

The Innovators Behind Business U

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Celina Shands Gradijan
President/CEO and Co-founder

Business U learning events are led by Full Capacity Marketing (FCM) President/CEO, Celina Shands Gradijan, a former American Marketing Association Marketer of the Year and a two-time Women Who Mean Business finalist. Celina holds a B.S in Business and Marketing and has more than 25 years experience as a consultant and facilitator. Her private sector experience lends itself to building systematic approaches in the nonprofit and government sectors, finding creative solutions to shrinking budgets, and aligning staff around organizational objectives and values. Celina is a sought-after keynote speaker and trainer at national and state workforce, education and economic development conferences.

Celina leads a national consulting firm that specializes in aligning an organization's business processes with its brand strategy. This unique approach combines private sector quality improvement processes such as Lean Six Sigma, Malcolm Baldrige, Total Quality Management, and change management with branding, marketing and communications strategies that result in streamlined operations, improved community awareness, strategic partnerships, and funding for government, nonprofit and community-based organizations. The end result has garnered her customers millions of dollars in additional funding, and put FCM on the radar screen as a communications expert among federal, state and local organizations.

Web:
Full Capacity Marketing, Inc.

Publications:
Social Entrepreneurship: New Business Models for Workforce Boards

National Economic Impact Scorecard Initiative

Workforce Website Benchmark Study

Christine Bosworth, Ed.D
Chief Strategy Officer and
Co-founder
Chair, Board of Advisors
Business U

Los Angeles County
Workforce Investment Board
Commissioner
Officer, Exec. Comm.
Member, Business Services Comm

A recognized business and educational leader, Dr. Bosworth is involved in every aspect of Business U's operations, and is responsible for the co-development and delivery of training programs including aligning curriculum with demonstrated outcomes that meet accreditation standards, designing and managing Business U's eUniversity with the latest advances in instructional design and technology, delivering keynotes at workforce, education and economic development conferences, creating sustainable partnerships with organizations that support the mission of Business U, and ensuring that Business U itself undergoes a continuous improvement process.

Dr. Bosworth has worked for large organizations in various industries; and is known for her entrepreneurial spirit successfully launching starts-ups in education, retail, and hospitality. She is a relationship-building champion and a community advocate; her work as a Commissioner on the Los Angeles County Workforce Investment Board keeps her current about labor market, workforce development and economic intelligence on a state and national level.

Dr. Bosworth has a master's degree specializing in adult education, and earned her doctorate degree from UCLA in educational leadership.

Web:
www.professionalcareereducation.org

Publication:
Coaching Online Students to Persist

Action Research:
Leadership
Workforce Training and Development
Online Learning & Retention
Adult Learning Theory
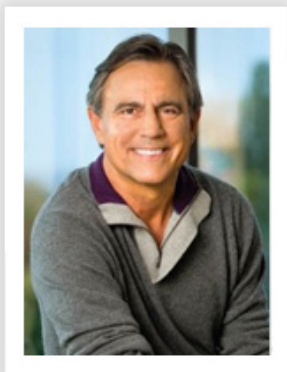
Phil Blair
Chief Officer
Manpower San Diego

As a Business U Board of Advisor, Phil's role is to ensure that the Business U curriculum aligns with business' expectations, especially building and maintaining relationships with C-level executives. Since 1977, Phil Blair and his professional partner Mel Katz, have built Manpower of San Diego into the largest Manpower franchise in the U.S. with annual revenues exceeding $125 million. Manpower provides quality employment opportunities for thousands of San Diegans. Their training programs range from community work ready to veterans' programs preparing them to enter the civilian workplace. Phil is an oft-quoted employment commentator, appearing in local and national business media, and is a professional speaker on employment and workforce trends and issues, as well as a career coach. He has just finished his first book Job Won! which is a complete guide to finding and managing a successful career in today's economy.

Web:
www.manpower.com

Publication:
Job Won!

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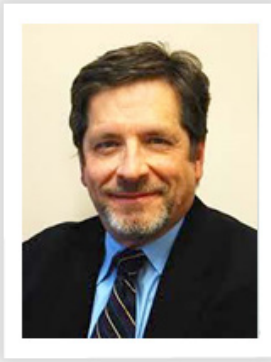
Ron Painter
Chief Executive Officer
National Association of
Workforce Boards (NAWB)

National Association
of Workforce Boards

As a Business U Board of Advisor, Ron ensures that workforce boards have access to Business U's learning events and technology from a national perspective to move them to a next level of performance in regional business engagement as outlined in WIOA. Prior to his role at NAWB, Ron was the founding CEO of the Three Rivers Workforce Investment Board in Pittsburgh, where under his leadership the organization focused on producing labor market research, working with public educators on improved student career information, supporting community leaders in the development of regional benchmarks, and establishing the Regional Workforce Collaborative whose membership includes community colleges, workforce investment boards, employers, labor, and economic development professionals. Before joining the Three Rivers Workforce Board, he worked in Washington, DC, first on loan to the U.S. Department of Labor for the Enterprise Project, and then for the National Alliance of Business. Ron and his team at NAWB have been integral into getting the new WIOA authorized.

Web:
www.nawb.org
www.JustAddOne.net
www.WorkforceinvestmentWorks.com

Cheryl Carrier
Executive Director
Ford Next Generation Learning
(Ford NGL)

Cheryl's role at Business U is to ensure that pipeline strategies are being integrated into regional business services and that the curriculum is successful in building executive level private sector partnerships that are sustainable. Ford NGL is the signature education program of Ford Motor Company Fund and Community Services and Cheryl leads the team responsible for developing and managing the program, which is designed to engage employers, educators, and community leaders in the common goal of preparing today's high school students for the careers of tomorrow. Through community engagement, Ford NGL provides a proven framework to develop high school academies that are career-themed and provide students with opportunities to engage in relevant, academically rigorous, authentic learning opportunities. Currently, there are 20 communities across the country that are using the Ford NGL framework and are supported by Ford Motor Company Fund. Cheryl works closely with business executives, government/civic leaders, and economic development and workforce development intermediaries to help align education with the skills needed by companies and the local region.

Web:
https://fordngl.com/cheryl-carrier-1

BU

Alma Salazar, Ed.D
Vice President of Education and
Workforce Development
Los Angeles Area
Chamber of Commerce
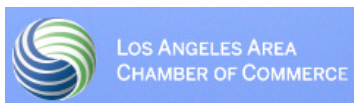
Chambers of Commerce play an integral role in business engagement, and Dr. Salazar works diligently as a Business U Advisor to help our participants understand how to best integrate chambers as part of a regional business engagement team. Dr. Salazar is Vice President of Education and Workforce Development for the Los Angeles Area Chamber of Commerce and oversees the Chamber's education and workforce development programs and also directs the Chamber's higher education and workforce development policies. In 2012, Salazar was appointed by Governor Jerry Brown to serve on the California Workforce Investment Board.

Since 2000, Salazar has worked to build business/ education partnerships to improve academic achievement and life-long learning for California's students. Salazar has demonstrated success at convening diverse groups of stakeholders to promote systems-change and strengthen the region's workforce development system by expanding/enhancing relationships that build pathways to high demand, high growth industries, and sustainable careers. Serving as an intermediary, Salazar looks to create and support effective collaboration among education, business, civic and workforce development leaders to influence policies that strengthen regional education and workforce development systems. Salazar graduated from California State University, Long Beach with a bachelor's degree in speech communication, a master's degree in public policy and administration and doctoral degree in Educational Leadership. Salazar was also awarded the prestigious 2012 American Memorial Fellowship by the German Marshall Fund of the United States

Web:
Los Angeles Chamber of Commerce

Kenneth E. Poole, Ph.D.,
Chief Executive Officer
Center for Regional Economic
Competitiveness (CREC)

Executive Director
Council for Community and
Economic Research (C2ER)

CREC
CENTER FOR
REGIONAL ECONOMIC
COMPETITIVENESS

Dr. Poole's role at Business U is to ensure that Business U participants have a deep understanding of how to use data effectively to drive business engagement. Dr. Poole has managed economic development research, analysis, and technical assistance efforts for 25 years. In January 2000, Dr. Poole formed the Center as an independent non-profit affiliated with George Mason University and C2ER. CREC focuses on developing a stronger understanding of how regional economies can compete effectively in the knowledge-based economy. As part of those efforts, Dr. Poole directs a national nonprofit membership organization (C2ER) serving economic and community development researchers in communities, states, academia, and the private sector. In his capacity of Executive Director, Dr. Poole oversees all program development activities of the organization including its research and professional training activities. He also serves as Executive Director for the Labor Market Training Institute and Staff Director for the Association of Public Data Users.

Web:
www.creconline.org

Publications:
Labor Market Information -
Customers and Their Needs

BU
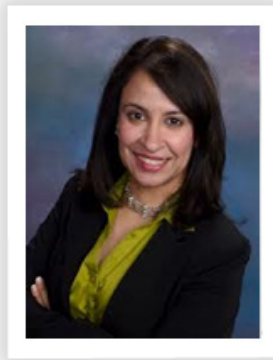
Gurbax Sahota
President & CEO
California Association for Local
Economic Development

California Academy for Economic
Development

Gurbax's role as a Business U Advisory Board member is to align workforce and economic development from an operational perspective, and to ensure that both of these verticals understand each other's domains. As President & CEO of CALED, Gurbax is focused on creating strategic partnerships to promote the value of economic development and create a stronger voice for economic developers at the state level. Gurbax has made many notable contributions during her tenure at CALED. Having raised over one million dollars in grant funding in the last four years, she helped create a strong foundation for CALED so we can continue to provide services and benefits to economic developers across the state. Additionally, she played a key role in many of CALED's programs, such as negotiating a partnership with CSU Fresno and the California Academy for Economic Development to offer an International Economic Development Council (IEDC) accredited economic development certificate course in California. Gurbax serves on CDFA & IEDC's Board of Directors Gurbax holds senior positions with CALED, the California Academy for Economic Development, and the California Enterprise Development Authority.

Web:
www.caled.org
www.edacademy.org

CONTACTUS

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Business U : Account Registration

If this is the first time you are registering for a Business U Learning Event, please complete the form below.
If you have already attended a Business U Learning Event, please click My eUniversity. You will be directed to the eUniversity login page.

Name:

Address:

City:

State:

Zip Code:

Phone:
(Please include area code)

Email:

Title:

Organization Name:

How long have you been
in your current role?:

Organization Type:
- Workforce Development
- Economic Development
- Community College/Education
- Small Business Development Center
- Chamber of Commerce
- High Growth Sector Initiative Rep
- High Growth Sector Committee Member

Affiliation:

18 years of age or older: ○ Yes ○ No

Where did you hear about
Business U?
(select option from dropdown menu):

Menu of Courses: (select your course via the dropdown bar below)

Submit

Logistics Communication

CB

From: Christine Bosworth [mailto:Christine@Business-U.net]
Sent: Monday, May 18, 2015 1:45 PM
To: 'Neonee.senoro@edd.ca.gov'
Subject: Business U-Business Engagement Boot Camp Logistical Information

Hello, Boot Camper!

On behalf of your facilitators, Celina & Christine, welcome to Business Engagement Boot Camp!

Boot Camp is just around the corner: <u>Wednesday, May 20th</u>, and as you can see from the attached agenda, the day is action packed.

Please find below logistical information as well as your live chat schedule:

DATE
Wednesday, November 20, 2015

TIME
Continental breakfast and check-in starts at 8:30 am
We will start <u>promptly</u> at 9:00 am and end at 5:00 pm

LOCATION
Goodwill AJCC
880 industrial way
San Luis Obispo, CA 93401

MEETING ROOM
3rd Floor Conference Room (C-3)

PARKING
There is ample parking on both sides of the building. Note the red awning with the signage "American Job Center."

FOOD & BEVERAGE
Business U is hosting a continental breakfast and lunch (including snacks!).

LIVE CHAT
Hosted by your Boot Camp facilitators online at Business U's eUniversity
(www.businessuonline.com)
Live Chat #1: June 10, 2015 from 1:00 pm – 2:00 pm

BU

Live Chat #2: June 18, 2015 from 1:00 pm – 2:00 pm

We look forward to working with you to maximize business engagement!

Christine

Christine Bosworth, Ed.D
Co-founder, Business U
Los Angeles, CA 90024
P: (310) 800-3353
F: (310) 693-5329
E: Christine@Business-U.net
www.Business-U.net

BusinessU
Maximizing Business Engagement

BusinessU
Maximizing Business Engagement

Agenda

Business Engagement Boot Camp

Central Coast, CA

➢ Welcome & Introductions	9:00 am
➢ Boot Camp Overview	9:30 am
➢ Module 1: Establishing the Right Data Sets for Business Engagement	10:00 am
➢ Morning Break	10:45 am – 11:00 am
▪ Continue Module 1	11:00 am
➢ Module 2: Branding and Packaging to Maximize Business Engagement	11:35 am
➢ Lunch	12:30 pm – 1:00 pm
▪ Continue Module 2	1:00 pm
➢ Module 3: Consultative Selling & Business Outreach	1:45 pm

- Module 3: Consultative Selling & Business Outreach   1:45 pm
- Afternoon Break   2:30 pm
  - Continue Module 3   2:45 pm
- Module 4: Improving Market Position with B2B Strategies   3:15 pm
- eUniversity and Next Steps: Implementing Action Items!   4:30 pm – 5:00 pm

BU

From: **Christine Bosworth** Christine@Business-U.net 📎
Subject: FW: ACTION REQUIRED for Friday's Business Engagement Boot Camp!
Date: April 28, 2015 at 4:37 PM
To: Diana Ascher dianaascher@gmail.com

CB

Good morning, Boot Campers!

On behalf of your Business U coaches and facilitators, Welcome to Business Engagement Boot Camp!

Boot Camp is just around the corner: Friday, November 7th, and as you can see from the attached Agenda the day is action packed.

To maximize our time together on Friday, please find below logistic information as well as a link to complete the eUniversity registration form to receive your online credentials. The eUniversity is where you will implement your business engagement action items, gain access to technical assistance with Business U's subject matter experts, and participate in live chat coaching events with your facilitators after Boot Camp.

DATE: Onsite Boot Camp
Friday, November 7, 2014

TIME
Continental breakfast and check-in starts at 8:30 am
We will start promptly at 9:00 am and end at 5:00 pm

LOCATION: South Bay Workforce Investment Board (SBWIB)
11539 Hawthorne Blvd., 5th Floor, Hawthorne, CA 90250.
Meeting Place: Conference Room

PARKING:
Parking is available and conveniently located in the lot across the street—½ block west of SBWIB; on the corner of Grevillea Avenue and 116th Street. Signs will be posted on the street to help direct you to the parking lot.

FOOD & BEVERAGE
Business U is hosting a continental breakfast and lunch (including snacks!).

eUniversity Registration: http://www.businessuonline.com/registration.php
Please click on the link above to complete your eUniversity registration form before the start of Boot Camp—select the November 7th Boot Camp Event. Make sure that you provide a current email address to receive your login credentials.

eUniversity Orientation Video
We will review the components of Business U's eUniversity during Boot Camp, but if time permits, click

Hello, Boot Campers!

On behalf of your facilitators, Celina & Christine, welcome to business engagement Boot Camp!

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Please find below logistical information as well as your live chat schedule:

DATE
Wednesday, November 20, 2015

TIME
Continental breakfast and check-in starts at 8:30 am
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Goodwill AJCC
880 industrial way
San Luis Obispo, CA 93401

MEETING ROOM: 3rd Floor Conference Room (C-3)

PARKING
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Hosted by your Boot Camp facilitators online at Business U's eUniversity (www.businessuonline.com)
Live Chat #1: June 10, 2015 from 1:00 pm – 2:00 pm
Live Chat #2: June 18, 2015 from 1:00 pm – 2:00 pm

We look forward to working with you to maximize business engagement!

Christine

BU

CATEGORY 5

LEARNING OUTCOMES

5.1 The Provider has learning outcomes that are clear, specific, and measurable, and that reflect what learners will achieve in each learning event.

As described in the previous section, learning event outcomes are planned with a set of clear and specific written statements of intended learning outcomes that address the needs of a specific audience, which arise during the needs-analysis and development-planning phase. The Learning Event Design Document is Business U's formal method for codifying the conncetions between desired learning outcomes and the selected instrucctional approaches, activities, and methods. This document also enables the evaluation of continuous improvement efforts over time. (See Category 10.)

As such, each Business U learning event has written, clear, specific, concise, and measurable learning outcomes, as well as explicit indication of the learner deliverables evaluated to determine whether the learner has achieved the learning outcomes at the conclusion of the learning event. Further, each module within a learning event is aligned with one or more of the learning outcomes. These components are shared with learners at the beginning of each learning event.

WHAT'S NEXT?

Evidence of compliance with Category 5

Learning Event Design Documents (2)

Instructional Design Document – Learning Event

Updated: July 14-21, 2014 – Draft CB 6.0

<u>Learning Event</u>

Business Services Intensive Training

<u>Delivery</u>

Modular curriculum: 1 – 5

Onsite: 8-hours a day for five days

Online: 45-hours of post training implementation coaching and follow-up

<u>Audience</u>

Workforce, Education, and Economic Development Business Services <u>Staff</u>

<u>Goal</u>

The goal of this 40-hour course is to increase usage of workforce and economic development services in communities nationwide by providing business services staff with the knowledge and skills they need to understand and use operational protocols, customer relationship management strategies, and a comprehensive suite of communication tools to maximize collaborative efforts to engage employer/business customers effectively.

<u>Modules</u>

Modular 1: Build Effective Operational Processes for a Market Responsive Business Services Team

Modular 2: Expand Business Services through Regional Partners

Modular 3: Design a Business Services Strategic Communications Plan and Scorecard

Modular 4: Engage Business and Improve Market Penetration Using Consultative Selling

Modular 5: Improve Market Position Using Technology and Social Media

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Outcomes

- Build Effective Operational Processes for a Market Responsive Business Services Team. Upon the completion of Modular 1, the participant will be able to: **PLACEHOLDER**

  - Accurately identify three elements of "Continuous" Process Improvement.
  - Produce one process map with all of the elements required in a high performing market responsive business services team.
  - Use a SIPOC chart to create the correct internal processes for a market responsive business services team.

- **Expand Business Services through Regional Partners. Upon the completion of Modular 2, the participant will be able to:**

  - Describe the three elements required in a market-responsive regional business services portfolio.
  - Map regional assets and services to effectively broaden a business services portfolio.
  - Design a needs assessment with the four required elements for relationship building in the business community.

- **Design a Business Services Strategic Communications Plan and Scorecard. Upon the completion of Modular 3, the participant will be able to:**

  - Identify three essential communication tools to engage businesses successfully.
  - Apply a communication platform formula accurately.
  - Produce a business services scorecard that precisely measures more than one data point.
  - Develop a comprehensive outreach plan that contain five key parts: market segment, communication medium, communication message, frequency of communication, and in-process metrics.
  - Create three key "message points" to engage businesses.

- **Engage Business and Improve Market Penetration Using Consultative Selling. Upon the completion of Modular 4, the participant will be able to:**

  - Explain the appropriate result-measures that monitor the four areas of market position: brand awareness, brand comprehension, brand equity, and market penetration correctly.
  - Demonstrate the five-step approach to engage an employer as a customer or partner effectively.
  - Differentiate the three main differences between a "solutions" and a "show and tell" selling approach accurately.

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  - Diagram three selling techniques to the appropriate business solution.
  - Compile a "lead" list to prospect confidently.

- **Improve Market Position Using Technology and Social Media. Upon the completion of Modular 5, the participant will be able to:**

  - Identify the correct result-measures to monitor five social media strategies.
  - Examine five social media strategies that are best used for engaging business as a customer or partner.
  - Develop a social media plan that includes three elements to monitor its effectiveness.

Instructional Design Document – Matrix

Updated: July 14-21, 2014

Modular 1: *Build Effective Operational Processes for a Market Responsive Business Services Team*

Purpose	Cognitive Level	Learning Outcome	Time Allotted	Instructional Materials Used	Instructional Method learning Style	Assessment Method and Performance Criteria	Notes
Table to be completed after discussion with Frank	Placeholder	PLACEHOLDER Accurately identify three elements of Continuous Process Improvement.	X Minutes				
	Placeholder	PLACEHOLDER Produce one process map with all of the elements required in a high performing market responsive business services team.	X Minutes				
	Placeholder	PLACEHOLDER Use a SIPOC chart to create the correct internal processes for a market responsive business services team.	X Minutes				

Modular 1: *Build Effective Operational Processes for a Market Responsive Business Services Team*

Evaluation of Training and Learning
(Continuous Process Improvement)

Evaluation Type	Evaluation Tool & Method	**Note: Evaluation Measurements**
Level 1: Reaction (How the participant felt about the learning/training)	Feedback form Post-training survey Questionnaire	Whatever evaluation instruments we finally decide to implement, one of them (such as the end of course survey as well as the end of each modular survey) must contain the following 5 measurements per IACET standard:
Level 2: Learning (Measurement of the increase in knowledge, conducted before and after the training)	Assessment pre and post the learning event: can be an interview, test or observation. **Note:** Level 2 measurements come from the assessment instruments used to judge the trainee's accomplishment/performance of the learning outcome	➢ **Successful achievement of learning outcomes**: Trainee's opinion of how well the course achieved the defined learning outcomes. ➢ **Instructor competence in subject matter and instructional skill**: Trainee's impression of the instructor's knowledge of the subject matter and instructing skill.
Level 3: Behavior (Trainee's ability to apply his/her new skills/knowledge back on the job)	Observation and interviews over time: relevance and sustainability of change **Note**: this is considered to be difficult to measure since we are offering a "one-off" type of training, however the 45-day online coaching/follow-up could be considered here.	➢ **How learning may be applied**: Trainee opportunity to provide feedback on how he/she can apply the new skills/knowledge on the job. ➢ **Quality of the learning environment**: Trainee's opinion of the learning environment and was it appropriate for the course.
Level 4: Results (Effect on the trainee's performance on the business or other type of work/responsibility environment)	Measures are already in place via normal management systems and reporting. The challenge is to relate to the trainee. **Note**: this is considered to be difficult to measure since we are offering a "one-off" type of training, however the 45-day online coaching/follow-up could be considered here.	➢ **Opportunities to improve the learning event**: Recommendations from the trainee on how to improve the learning event such as new courses, topics, etc.

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Modular 2: *Expand Business Services through Regional Partners*

Purpose	Cognitive Level	Learning Outcome *Have to correlate with Bloom's cognitive levels of Instructional and Assessment methods*	Time Allotted	Instructional Materials Used	Instructional Methods *have to correlate with* Learning Styles *visual-auditory-kinesthetic*	*For CEUs we will need a performance criteria-- we need to develop instruments: surveys, instructor checklist & rubric, etc.* Assessment Method and Performance Criteria	Notes
Needs editing							
Educate participants on the elements of being a market responsive team as it pertains to having a network of regional partners; why a network of partners is necessary for a market responsive business services team through an expanded service portfolio, and how that can help build credibility with businesses. **Expose** participants to case studies of regional networks that have expanded their service portfolio. **Analyze** participants' network of regional partners and their key agencies so that they know how to approach partners to build an effective network. **Expose** participants to psychographics and market data **Customize** a needs assessment with a standards set of probing questions to determine the needs of the business prospect based on the expanded service portfolio.	Comprehension	Describe the three elements required in a market-responsive regional business services portfolio.	90 Minutes	PowerPoint Presentation Survey Tools & Reports Guest Speakers Case Studies White board or flip chart to record and review follow-up questions, ideas and suggestions Overhead projector and screen Markers Outline	**Lecture and Discussion** **Visual Examples**	**Knowledge Check Group Activity** *Q & A Discussion* Instructor will assess and provide feedback using a checklist What is the minimum acceptable performance?	**Pre-work**: participants complete an online assessment before starting Modular 1. **Pre-work**: participants required to bring their organizations' strategic plan identifying key market segments **Post-work**: 45-day online map and needs assessment coaching
	Application	Map regional assets and services to effectively broaden a business services portfolio.	180 Minutes		**Lecture and Discussion** **Case Studies** **Small Group Activity** Map an expanded service portfolio	**Group Presentation** *Portfolio Mapping* Instructor, using a rubric, will assess the material presented from the small group activity for aptness and to provide feedback. Performance?	
	Synthesis	Design a needs assessment with the four required elements for relationship building in the business community.	210 Minutes		**Lecture and Discussion** **Case Studies** **Small Group Activity:** Develop a Needs Assessment based on the expanded service portfolio	**Group Presentation** *Needs Assessment* Instructor, using a rubric, will assess material presented from the small group activity for aptness and to provide feedback. Performance?	

Modular 2: *Expand Business Services through Regional Partners*

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Evaluation of Training and Learning
(Continuous Improvement Process)

Evaluation Type	Evaluation Tool & Method	Evaluation Measurements:
Reaction		
Learning		
Behavior		
Results		

IACET Council on Standards Development ©2014

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IACET AP Handbook 113

Modular 3: *Design a Business Services Strategic Communications Plan and Scorecard*

Purpose **Needs editing**	Cognitive Level	Learning Outcome	Time Allotted	Instructional Materials Used	Instructional Method learning Style	Assessment Method and Performance Criteria	Notes
Educate participants on the elements of being a market responsive team as it pertains to strategic communica-tions. **Introduce** participants to communica-tion terms, tools, and strategies. **Introduce** participants to market-responsive value propositions for different market segments using a communica-tion platform formula.	Comprehension	Identify three essential communication tools to engage businesses successfully	60 Minutes	PowerPoint Presentation Survey Tools & Reports Checklist of Communica-tion Tools Communication Platform Grid Communica-tion Plan "Message" Examples and Case Studies White board or flip chart to record and review follow-up questions, ideas and suggestions Overhead projector and screen Markers Outline	**Lecture/Discussion Visual Examples Discussion Q & A** Are you market-responsive? Where are your team gaps?	**Knowledge Check Group Discussion** *Market Responsive Assessment Score* Instructor will assess and provide feedback using a checklist	**Pre-work:** Online assessment completed before the start of Modular 1. **Pre-work:** Participant will bring organiza-tions' current business services communca-tion tools **Post work:** Communica-tion plan and scorecard finalized during the 45 day online coaching opportunity
	Application	Apply a communication platform formula accurately	140 Minutes		**Lecture/Discussion Small Group Activity:** Key messages for market segments	**Group Presentation** *Messages for Service Portfolio* Instructor, using a rubric, will assess the material presented from the small group activity for aptness and to provide feedback.	
	Application	Produce a business services scorecard that precisely measures more than one data point	110 Minutes		**Lecture/Discussion Small Group Activity:** Develop a communication plan and scorecard	**Group Presentation** *Communication Plan and Scorecard* Instructor, using a rubric, will assess the material presented from the small group activity for aptness and to provide feedback.	
	Analysis	Develop a comprehensive outreach plan that contain five key parts: market segment, communication medium, communication message, frequency of communication, and in-process metrics	110 Minutes		**Lecture/Discussion** **Small Group Activity:** Develop an Outreach plan	**Group Presentation** *Outreach Plan* Instructor, using a rubric, will assess the material presented from the small group activity for aptness and to provide feedback.	
	Synthesis	Create three key message points to engage businesses	60 Minutes		**Lecture/Discussion Activity:** Simulation Message points	**Group Presentation** *Message Points* Instructor led peer review/critique using a rubric.	

Modular 3: *Design a Business Services Strategic Communications Plan and Scorecard*

Evaluation of Training and Learning
(Continuous Improvement Process)

Evaluation Type	Evaluation Tool & Method	Evaluation Measurements:
Reaction		
Learning		
Behavior		
Results		

Modular 4: *Engage Business and Improve Market Penetration Using Consultative Selling*

Purpose	Cognitive Level	Learning Outcome	Time Allotted	Instructional Materials Used	Instructional Method learning Style	Assessment Method and Performance Criteria	Notes
Educate participants on the elements of being a market responsive team as it pertains to consultative selling.	Comprehension	Explain the appropriate result-measures to monitor four areas of market position that include brand awareness, brand comprehension, brand equity, and market penetration correctly	120 Minutes	PowerPoint Presentation Survey Tools & Reports Five-Phase Chart	**Lecture/Discussion** **Visual & Audio Examples** **Discussion Q & A**	**Knowledge Check Group Discussion** *Market Responsive Assessment Score* Instructor will assess and provide feedback using a checklist	**Pre-work:** Online assessment completed before the start of Modular 1.
Introduce participants to the five phases of selling to businesses and to identify c-level executives within a company to understand motivators.	Application	Demonstrate the five-step approach to engage an employer as a customer or partner effectively	80 Minutes	C-Level Chart Script Guidelines	**Lecture/Discussion** **Creative Group Activity:** Five-Phase Map	**Group Presentation** *Putting it all Together* Instructor, using a rubric, will assess the material presented from the small group activity for aptness and to provide feedback	
	Analysis	Differentiate the three main differences between a "solutions" and a "show and tell" selling approach accurately	80 Minutes	Objection List and Value Points List Five-Phase Map	**Lecture/Discussion** **Small Group Exercise:** Script Development	**Group Presentation** *Consultative Selling Script* Role Play Instructor led peer review/critique using a rubric.	
Introduce participants to the elements of a cold call script & development of an elevator speech	Analysis	Diagram three selling techniques to the appropriate business solution	80 Minutes	White board or flip chart to record and review follow-up questions, ideas and suggestions	**Lecture/Discussion** **Small Group Exercise:** Develop List of Objections and Value Points	**Group Presentation** *Objections & Values* Role Paly Instructor, using a rubric, will assess the material presented from the small group activity for aptness and to provide feedback	
Introduce participants to the potential objections and how to overcome them.	Synthesis	Compile a "lead" list to prospect confidently	120 Minutes	Overhead projector and screen Markers Outline	**Lecture/Discussion** **Small Group Activity:** Construct a C-level Chart	**Group Presentation** *C-level Chart* Instructor, using a rubric, will assess the material presented from the small group activity for aptness and to provide feedback.	

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Evaluation of Training and Learning
(Continuous Improvement Process)

Evaluation Type	Evaluation Tool & Method	Evaluation Measurements:
Reaction		
Learning		
Behavior		
Results		

Modular 5: *Improve Market Position Using Technology and Social Media*

Purpose	Cognitive Level	Learning Outcome	Time Allotted	Instructional Materials Used	Instructional Method learning Style	Assessment Method and Performance Criteria	Notes
Educate participants on the elements of being a market responsive team as it pertains to technology & social media. **Expose** and **Introduce** participants to today's technology and social media for successful B2B marketing and outreach that includes the using metrics for tracking success. **Educate** participates to self-develop a social media plan	Comprehension	Identify the correct result-measures to monitor five social media strategies	60 Minutes	PowerPoint Presentation Survey Tools & Reports Case Studies Internet Social Media Planning Template Overhead projector and screen Markers Outline	**Lecture/Discussion** **Visual & Audio Examples** **Discussion Q & A** Are you market-responsive? Where are your team gaps?	**Knowledge Check Group Discussion** *Market Responsive Assessment Score* Instructor will assess and provide feedback using a checklist	**Pre-work:** Online assessment completed before the start of Modular 1.
	Application	Examine five social media strategies that are best used for engaging business as a customer or partner	240 Minutes		**Lecture/Discussion** **Small Group Exercise:** Outline the five social media strategies to engage a customer	**Group Presentation** *Social Media Strategy* Instructor will select one of the five social medial strategies to be presented. Using a rubric, the instructor will assess the material presented from the small group activity for aptness and to provide feedback	Post Work: Plan completion within 45 days and evaluation of social media analytics
	Analysis	Develop a social media plan that includes three elements to monitor its effectiveness	180 Minutes		**Lecture/Discussion** **Small Group Exercise:** Develop a social media and technology plan	**Group Presentation** *Social Media Plan* Instructor, using a rubric, will assess the material presented from the small group activity for aptness and to provide feedback	

Modular 5: *Improve Market Position Using Technology and Social Media*

Evaluation of Training and Learning
(Continuous Improvement Process)

Evaluation Type	Evaluation Tool & Method	Evaluation Measurements:
Reaction		
Learning		
Behavior		
Results		

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Instructional Design Document

Learning Event: **Business Engagement Boot Camp**

Instructional Designer	Supporting Leadership Team	Champions	Target Audience
Christine Bosworth, Ed.D Co-founder	Celina Shands Gradijan Co-founder	➢ Public Workforce System ➢ Community Colleges: Career & Technical Education Workforce & Economic Division ➢ Economic Development Agencies ➢ Chambers of Commerce ➢ Small Business Development Centers	Workforce, education and economic development leadership and employer-facing staff who engage with small, medium and large employers either as a customer with a portfolio of business services, as a partner to collaborate on sector strategies and curriculum design, and/or as a funder through social investment initiatives.
	Subject Matter Experts		
	Christine Bosworth Celina Shands Gradijan		

Summary Needs Assessment	Goal	Learning Outcomes
Under the Workforce Innovation & Opportunity Act, recently signed into law by President Obama on July 22, 2014, workforce leadership and business services staff are charged to strengthen their connection to employers by identifying their employment needs through strategically planned outreach efforts and communication methods to encourage employers to support their utilization and participation in the local workforce and economic system. This requires a revisit of critical organizational components to develop and motivate an effective, market-responsive business engagement team that is regionally collaborative and that can engage a diverse range of employers, as well as use innovative technology tools to manage customer and partner relationships within workforce, education and economic development.	Introduce participants to Business U's market responsive, customer-centric framework to maximize engagement of businesses as a partner (in sector strategies), as a customer (with business services), and as a funder (through social investment initiatives).	➢ Identify the components of a market responsive business engagement team. ➢ Create a list of key data points needed for business engagement outreach. ➢ Apply a communication platform formula by developing three key "message points" to engage businesses. ➢ Differentiate the three main differences between a "solutions" and a "show and tell" selling approach. ➢ Examine five technology strategies that are best used for engaging business as a customer or partner.

Design Document Learning Event: Business Engagement Boot Camp 1.0 – Updated: April 2015

Delivery of Learning Event	
Facilitator:Participant Ratio	2 facilitators per 30 participants/learners

On-site at client location
 	
➢ Start at 9:00 AM
 	
➢ End at 5:00 PM
	8 hours facilitation (480 minutes)
	
	➢ 1 hour and 45 minutes (105 minutes)
	  ✓ Introductions = 10 minutes
	  ✓ Morning Break = 10 minutes
	  ✓ Lunch = 45 minutes
	  ✓ Afternoon Break = 10 minutes
	  ✓ Review & Summary = 10 minutes
	  ✓ eUniveristy/Coaching Support Overview/Certificate of Completion = 15 minutes
	  ✓ End of Course Survey = 5 minutes
	
	➢ 6.5 hours of unit-instructional time (375 minutes)
	  ✓ Overview = 30 minutes
	  ✓ Module 1 = 85 Minutes
	  ✓ Module 2 = 80 minutes
	  ✓ Module 3 = 90 minutes
	  ✓ Module 4 = 90 minutes

Online at Business U's eUniveristy	2 hours of implementation coaching and technical support (120 minutes) ➢ Live Chat Session #1 (60 minutes) – synchronistic ➢ Live Chat Session #1 (60 minutes) – synchronistic ➢ Each session consists of the following: - Synchronistic discussions/messaging between coach(s) and participants

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Unit On-site	Time Allotted (minutes)	Purpose	Outcome (Cognitive Level)	Instructional Materials	Method & Learning Style	Assessment & Performance Criteria	
Overview	30	To define "Business Engagement" and the new law (WIOA) that governs it; and to provide an overview of the components required to implement an "ideal state" for an effective business engagement team.	**Identify** the components of a market responsive business engagement team. (Comprehension)	Course Outline PowerPoint Screen Laptop Speakers Flip Chart and post-it-notes to record key phases	Presentation Discussion • Auditory • Visual **Individual Activity** Business Engagement self-assess survey	✓ Attendance mandatory and recorded by facilitator ✓ Completed Survey ✓ Self-assess survey and compare it to Facilitator's "Ideal State" checklist	No pre-work

Unit On-site	Time Allotted (minutes)	Purpose	Outcome (Cognitive Level)	Instructional Materials	Method & Learning Style	Assessment & Performance Criteria	
Module 1 *Establishing the Right Data Sets for Business Services*	85	To introduce participants to the first step in reengineering the business services team; by collecting the correct market data to understand the market needs of employers, business and industry, as well as their needs and motivations to take action.	**Create** a list of key data points needed for business engagement outreach. (Synthesis)	PowerPoint Screen Laptop Speakers Flip Chart and post-it-notes to record key phases End of Module 1 Survey	Presentation Discussion • Auditory • Visual **Small Group Activity** Develop a list of regional partners outside the workforce system • Auditory • Visual • Kinesthetic **Small Group Activity** Develop a needs assessment instrument • Auditory • Visual • Kinesthetic	✓ **Q & A Knowledge check** ✓ **Group Presentations** Facilitator will use a rubric to assess the Needs Assessment instrument from the small group activity for appropriateness and aptness and to provide feedback after each small group presentation.	No pre-work End of Mod 1 Survey

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Unit On-site	Time Allotted (minutes)	Purpose	Outcome (Cognitive Level)	Instructional Materials	Method & Learning Style	Assessment & Performance Criteria	
Module 2 *Branding & Packaging Business Services*	80	To understand that a brand strategy goes well beyond a logo; and that it is the foundation for any organization to support the marketing and positioning of its products and services.	**Apply** a communication platform formula by developing three key "message points" to engage businesses. (Application)	PowerPoint Screen Laptop Speakers Flip Chart and post-it-notes to record key phases End of Module 2 Survey	Presentation Discussion • Auditory • Visual **Small Group Activity** Develop and practice elevator speech • Auditory • Visual • Kinesthetic **Small Group Activity** Develop a communication platform include 3 key message points for each market segment • Auditory • Visual • Kinesthetic	✓ **Q & A Knowledge check** ✓ **Group Presentations** Facilitator led peer review and critique of the communication platform from the small group activity. Participants are given a rubric to use for evaluation and feedback.	No pre-work End of Mod 2 Survey

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Unit On-site	Time Allotted (minutes)	Purpose	Outcome	Instructional Materials	Method & Learning Style	Assessment & Performance Criteria	
Module 3 *Consultative Selling & Business Outreach*	90	To expose participants to an effective business services approach using the five steps involved to fully engage a business or employer prospect as a customer or partner. The five steps include: Prospecting; Outreach; Consultation; Solutions Selling; and Engagement.	**Differentiate** the three main differences between a "solutions" and a "show and tell" selling approach. (Analysis)	PowerPoint Screen Laptop Speakers Script Guidelines C-level Chart Five-step map template Flip Chart and post-it-notes to record key phases End of Module 3 Survey	Presentation Discussion • Auditory • Visual **Small Group Activity** Develop cold-calling introduction script • Auditory • Visual • Kinesthetic **Small Group Activity** Develop your compelling reason outline • Auditory • Visual • Kinesthetic	✓ **Q & A Knowledge check** ✓ **Group Presentations** Facilitator led peer review and critique of the cold-call introduction script from the small group activity. Participants are given a rubric to use for evaluation and feedback. ✓ **Group Presentations** Facilitator will use a rubric to assess the group's "compelling reason outline" from the small group activity for appropriateness and aptness and to provide feedback after each small group presentation	No pre-work End of Mod 3 Survey

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Unit On-site	Time Allotted (minutes)	Purpose	Outcome	Instructional Materials	Method & Learning Style	Assessment & Performance Criteria	
Module 4 *Improving Market Position*	90	To understand that Improving market position means that employers/ businesses are aware of the organization, understand the mission of the business services team, and value the service mix. This requires not only understanding one-to-one relationship building, but also one-to-many relationship strategies by using technology and social media tools to build relationships effectively that will generate new leads and prospects.	**Examine** five technology strategies that are best used for engaging business as a customer or partner. (Application)	PowerPoint Screen Laptop Speakers Social Media Planning Template Case Study CRM Tool Flip Chart and post-it-notes to record key phases End of Module 4 Survey	Presentation • Auditory • Visual **Small Group Activity** Develop a social media plan • Auditory • Visual • Kinesthetic **Demonstration** CRM tool • Auditory • Visual	✓ **Q & A Knowledge check** ✓ **Group Presentations** Facilitator will use a rubric to assess the social media plan from the small group activity for appropriateness and aptness and to provide feedback after each small group presentation	No pre-work End of Mod 4 Survey

Design Document Learning Event: Business Engagement Boot Camp 1.0 – Updated: April 2015

Learning Event Outline

Business Engagement Boot Camp

I.   Introductions & Agenda
- Sign-in sheet
- Agenda

II.   Overview
a. Defining Business Engagement
b. WIOA & Business Engagement
c. Demand Driven vs. Market Responsive
d. The "Ideal State" of a Business Engagement Team
e. Case Study Introduction: Kinexus
f. Individual Activity: Business Engagement Current State Assessment
- Self-assessment survey: Print copy of survey
- Review survey using facilitator's "Ideal State" checklist: Develop Ideal state checklist

III.   Module 1
a. Presentation & Discussion
b. Small Group Activity: Develop "Needs Assessment" template and instructions/outline directions
c. Small Group Activity: Develop a "list of regional partners" outside the workforce system
d. Outcome Assessment
- Q & A Knowledge Check
- Group Presentation: Develop "Needs Assessment" rubric
e. Module 1 survey: Develop two question survey: What did you like about this topic? What didn't you like about this topic?

IV.   Module 2
a. Presentation & Discussion
b. Small Group Activity: Develop a "communication platform" include 3 key message points for each market segment
c. Small Group Activity: Develop and practice "elevator speech"
d. Outcome Assessment
- Q & A Knowledge Check
- Group Presentation: : Develop "communication platform" peer led/critic rubric

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e. Module 2 survey: What did you like about this topic? What didn't you like about this topic?

V.   Module 3
    a. Presentation & Discussion
    b. Small Group Activity: Develop "cold-calling" introduction script
    c. Small Group Activity: Develop "your compelling reason" outline
    d. Outcome Assessment
        - Q & A Knowledge Check
        - Group Presentation: : Develop "cold-calling introduction script" peer led/critic rubric
        - Group Presentation: : Develop "your compelling reason outline" rubric
    e. Module 3 survey: What did you like about this topic? What didn't you like about this topic?

VI.   Module 4
    a. Presentation & Discussion
    b. Small Group Activity: Social media planning template
    c. CRM Demonstration
    d. Outcome Assessment
        - Q & A Knowledge Check
        - Group Presentation: Develop "social media plan" rubric
    e. Module 4 survey: What did you like about this topic? What didn't you like about this topic?

VII.   Review/Summary of learning Event

VIII. eUnivierity
    a. Coaching overview: create handout: coaching and technical support overview, timeline of events and next steps
    b. Online-classroom Orientation Demonstration: create handout
    c. Certificate of Completion: Create an example-discuss when given

IX.   End of Course Survey: Develop survey

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TO BE DEVELOPED

INSTRUMENTS – OUTLINES – HANDOUTS – MATERIALS
OVERVIEW

Item	Activity	Assessment	Handout	Outline	Survey

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TO BE DEVELOPED

INSTRUMENTS – OUTLINES – HANDOUTS – MATERIALS

MODULE - 1

Item	Activity	Assessment	Handout	Outline	Survey

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TO BE DEVELOPED

INSTRUMENTS – OUTLINES – HANDOUTS – MATERIALS

MODULE - 2

Item	Activity	Assessment	Handout	Outline	Survey

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TO BE DEVELOPED

INSTRUMENTS – OUTLINES – HANDOUTS – MATERIALS

MODULE - 3

Item	Activity	Assessment	Handout	Outline	Survey

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TO BE DEVELOPED

INSTRUMENTS – OUTLINES – HANDOUTS – MATERIALS

MODULE - 4

Item	Activity	Assessment	Handout	Outline	Survey

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INSTRUMENTS – OUTLINES – HANDOUTS – MATERIALS

CLOSE & NEXT STEPS

Item			Handout	Outline	Survey
End of Course Survey					X

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CATEGORY 6

PLANNING AND INSTRUCTIONAL PERSONNEL

6.1 Individuals involved in the design, development, delivery and evaluation of learning events are qualified to perform their assigned tasks.

Qualified personnel plan and conduct each Business U learning event. These individuals involved in the activity organizing, planning, and delivery are:

- involved in professional development activities to maintain competency
- trained in conducting a CET Needs Analysis as described in the previous two sections
- adhere to and demonstrate high standards of professional conduct
- compliant with Business U policies related to learning event development and evaluation
- committed to Business U's continuous improvement efforts

Business U's Certified Trainer program benefits individuals tasked with delivering training to, or managing, business-facing staff within workforce, education, and economic development organizations. This is a high-impact, two-day, on-site course that links outcomes to continuous improvement, an essential process for sustainability and maximizing staff potential. Two key differentiators are worth noting:

1. Each Trainer is assigned a subject matter expert to co-facilitate a highly specialized business engagement training topic.
2. All actions occurring online in Business U's eUniversity are monitored and measured, which affords Business U the ability to report back to the Trainer's organization, as well as to provide detailed feedback to help the Trainer achieve learning outcomes for certification.

All Business U Instructors/Coaches must meet the following minimum requirements to earn certification:

- Competent in the learning event content
- Credentialed and/or trained in planning and/or facilitating the learning event
- Knowledgeable in instructional methods and learning processes

Business U documents Instructor/Coach qualifications through comparisons of resumes LinkedIn profiles, educational and professional experience, licenses, and certifications to job description and program goals, in accordance with the Business U Policy on Instructor/Coach Credentials.

6.2 The Provider has a process in place to document individuals' professional development activities for purposes of ensuring those who are involved in the design, development and delivery of learning events remain current in subject matter material and learning methods.

Business U's Professional Development Policy outlines the formal and informal self-assessments used to ensure all Instructors/Coaches and other staff involved in the design, development, delivery, and evaluation of its learning events remain current in subject matter material and learning methods.

6.3 The Provider has a policy that demonstrates they do not discriminate or make explicit references of a discriminatory nature based on gender, ethnicity, religion, age, disability, socioeconomic status, and/or sexual orientation.

Business U not only requires strict adherence to the organization's Nondiscrimination Policy, but also conducts periodic assessments of perceptions with respect to promoting an inclusive, opportunity-rich organizational culture.

6.4 The Provider has a policy that discloses to learners, prior to the start of the learning event, any instructor's proprietary interest in any product, instrument, device, services or materials discussed, as well as the source of any compensation related to the presentation.

Business U provides information to learners prior to the start of each learning event that discloses any compensation and/or conflicts of interest according to its Conflict of Interest Policy. This disclosure is distributed via email, as well as on the Business U website and eUniversity.

6.5 The Provider has a policy that respects intellectual and legal property rights for any material used in its learning events.

Business U's Policy on Intellectual Property delineates the rights to intellectual property deriving from collaborative work in the development, delivery, and evaluation of its learning events. This policy is delivered to Instructors/Coaches and/or third parties prior to the signing of any collaborative agreements. It is also available on the Business U website, and discussed in Train-the-Trainer learning events.

BU

WHAT'S NEXT?
Evidence of compliance with Category 6

Policy on Instructor/Coach Credentials
Instructor/Coach Agreement
Nondiscrimination Policy
Professional Development Policy
Record of Professional Development
Conflict of Interest Policy
Intellectual Property Policy
Instructor/Coach Disclosure Form
Self-Assessment Instrument
Train the Trainer Material

Policy on Instructor/Coach Credentials

Business U employs instructors/coaches who are qualified to contribute to the advancement of Business U's mission and goals. When determining acceptable qualifications of its instructors, Business U gives primary consideration to those applicants who have earned the highest degree in the discipline. Business U also considers competence, effectiveness, and capacity, including, as appropriate, undergraduate and graduate degrees, related work experiences in the field, professional licensure and certifications, honors and awards, continuous documented excellence in teaching, and other demonstrated competencies and achievements that contribute to effective teaching and learner learning outcomes. For all cases, Business U is responsible for justifying and documenting the qualifications of its instructors/coaches.

Business U defines instructor/coach qualifications using the following credential hierarchy:
1. Doctoral degree in the teaching discipline
2. Masters degree in the teaching discipline
3. Doctoral degree with a concentration in the teaching discipline
4. Masters degree with a concentration in the teaching discipline
5. Bachelors degree in the teaching discipline
6. Associates degree and demonstrated competencies in the teaching discipline
7. Earned doctorate/terminal degree in the teaching discipline or a related discipline

Reference
ANSI/IACET 1-2013 Standard Category 6

Instructor/Coach Agreement

Instructors who function as Coaches for Business U, Inc., agree to comply with the following policy statements. This agreement is intended to ensure all Instructors/Coaches have a shared understanding of the roles and responsibilities associated with planning and delivering a Business U learning event in accordance with the ANSI/IACET 1-2013 Standard. Your signature on this agreement indicates your commitment to helping Business U achieve and maintain IACET Accredited Provider status.

1. The Instructor/Coach agrees to submit a resume to the Chief Education Officer indicating mastery in a) the relevant learning event content, b) planning and facilitating learning skills, and c) instructional methods and learning processes.

2. The Instructor/Coach agrees to seek and complete a minimum of six (6) hours of continuing education annually related to the a) relevant learning event content, b) planning and facilitating learning skills, and c) instructional methods and learning processes to ensure continued competency. Remember that you can receive professional development through our Train-the-Trainer Workshops, and that you are eligible for a reduced rate.

3. The Instructor/Coach agrees to include learning outcomes in the course planning and to discuss the learning outcomes in detail at the beginning of the learning event.

4. The Instructor/Coach agrees to treat all participants fairly and equally to avoid any appearance of discrimination on the basis of gender, age, socioeconomic or ethnic background, religion, sexual orientation, or disability.

5. The Instructor/Coach agrees that any course materials developed and/or presented for Business U will become the property Business U unless the Chief Education Officer approves another agreement at least 30 calendar days prior to the learning event.

6. The Instructor/Coach agrees not to advertise any proprietary programs or materials during any learning event, unless an exception has been approved by the Chief Education Officer and disclosed to learners in advance of the learning event, and immediately after discussion of the learning outcomes at the learning event.

7. The Instructor/Coach agrees to submit signed teaching agreements to the Chief Education Officer upon receipt and no later than two weeks before course start date.

/Policy_on_Attendance_and_Assessment

8. The Instructor/Coach agrees to become familiar with and to cover the approved lesson plan teaching points and the learning outcomes.

9. The Instructor/Coach agrees to submit request requests for printed handouts at least two weeks prior to the learning event start date.

10. The Instructor/Coach agrees to provide specific feedback to each learner in accordance with the assessment strategies and tools for the learning event. The Instructor/Coach shall also alert the Chief Education Officer **immediately** if a learner is in danger of failing to complete the requirements for the learning event to facilitate communication of options to the learner.

11. The Instructor/Coach agrees to comply with required attendance, timekeeping, and assessment procedures for each learning event module. **Following the last class session or within 2 business days of the last class session** of the learning event, the Instructor/Coach will submit signed attendance rosters and a completed Instructor/Coach Learning Event Evaluation to the Chief Education Officer.

12. The Instructor/Coach agrees to complete and submit all required learner assessment results according to the timeline provided for the particular learning event.

13. The Instructor/Coach agrees to refer and submit any and all business inquiries and leads resulting from the Business U learning event to the Chief Education Officer for follow up.

Reference
ANSI/IACET 1-2013 Standard Category 6

Please detach and return this portion to the Chief Education Officer.

I have read and agree with the policy statements in the Business U Instructor/Coach Agreement.

_____   _____
Instructor/Coach Signature   Date

_____
Printed Full Name

/InstructorCoach_Agreement.docx

Nondiscrimination Policy

Purpose

Business U, in accordance with applicable Federal and State law and Business U policy, does not discriminate on the basis of race, color, national origin, religion, sex, gender identity, pregnancy, physical or mental disability, medical condition, ancestry, marital status, age, sexual orientation, citizenship, or service in the uniformed services. Business U also prohibits sexual harassment. This nondiscrimination policy covers admission, access, and treatment in all Business U programs and activities.

Inquiries regarding Business U's nondiscrimination policy and reports of violations are welcomed at the Chief Education Officer's Office, Business U, Inc., 10920 Wilshire Blvd #150-9111
Los Angeles, CA 90024; 310-800-3353.

References
ANSI/IACET 1-2013 Standard for CE/T TK

Professional Development Policy

It is the policy of Business U to implement and fund a comprehensive professional learning program that complements and supports the development and facilitation of our learning events. The professional learning program is evaluated and revised annually to remain compatible with the mission and performance needs of the organization.

As an ongoing part of the professional learning program, Business U has instituted policies and processes to ensure compliance with the ANSI/IACET 1-2013 Standard as an approved Authorized Provider (AP) by the International Association for Continuing Education and Training (IACET), 1760 Old Meadow Road, Suite 500, McLean, VA 22102; (703) 506-3275 to award Continuing Education Units (CEUs) (one CEU equals 10 instructional hours). These policies and procedures are designed to promote the monitoring, educating, and continuous improvement necessary for accreditation and renewal of accreditation.

The Business U Chief Education Officer is responsible for ensuring compliance with the ANSI/IACET 1-2013 Standard, conducting the periodic review process which includes a mandatory report be generated and placed in an IACET compliance file, and applying for the reaccreditation during the fifth year.

Non-discriminatory
Individuals involved in developing, administering, and delivering Business U learning events are expected to demonstrate and maintain a high standard of professional conduct and will not discriminate nor make discriminatory remarks against learners on the basis of gender, age, socioeconomic or ethnic background, religion, sexual orientation, or disability.

Disclosure of Proprietary Interest
In advance of any learning event, any instructor must disclose to Business U and to the learners prior to the beginning of any learning event any proprietary interest in any product, instrument, device, service, or material discussed during the experience, event, or program, as well as the source of any third-party compensation related to the presentation. No commercial interests are allowed during the presentation from other vendors or agencies without approval from Business U.

Products that are the presenter's own material may be included for sale or as part of the course materials of a learning event only with approval from Business U. Learning event materials must state that the products are the presenter's own material.

Professional_Development_Policy

Intellectual Property Rights

Instructors who are hired or contracted to perform continuing education and training learning events with intellectual property rights for the design and delivery of continuing education and training will allow Business U and learners to use the design, delivery, and materials in the learning event to instruct students and/or other instructors/coaches.

Currency and Availability of Training Records

Business U maintains currency and availability of training records for a minimum of seven (7) years. Permanent records of learners attending learning events are updated and available upon request within fifteen (15) business days of written request by the learner. Learners are notified of the availability of their records prior to the end of the learning event.

Privacy and Security

Business U ensures that the privacy and information security of learners' records. All Business U personnel charged with the input, maintenance, release, and issuance of learners' records have been trained on the Business U Privacy and Security policy and procedure. Following the completion of a learning event, records and transcripts will be released only to the learner, or with the written permission and notification of the learner.

Reference
ANSI/IACET 1-2013 Standard Category 9

Professional_Development_Policy

Annual Instructor/Coach Development Plan Summary

Purpose

This development plan is intended to enhance instructor/coach development.

Name _____   **Signature** _____

Area of Teaching Specialization _____   **Date** _____

Time Period Covered by the Plan _____   Full-time or Part-time Status _____

Professional Growth Activities Plan

Date	In-service Topic	Verify Attendance	Documentation Attached

In the space provided below, give an explanation as why you have chosen to participate in the Activities listed in your plan, i.e., explain why this plan is suited to your needs as an instructor.

_____   _____
Instructor Signature   Date   Chief Education Officer Signature   Date

Annual_Dev_Plan.docx

BusinessU
Maximizing Business Engagement

Annual Instructor/Coach Development Plan Summary

Purpose

This development plan is intended to enhance instructor/coach development.

Name DIANA L. ASCHER   Signature D.

Area of Teaching Specialization INFORMATION STUDIES   Date 4.23.15

Time Period Covered by the Plan 5.1.15 – 5.1.16   Full-time or Part-time Status PT

Professional Growth Activities Plan

Date	In-service Topic	Verify Attendance	Documentation Attached
Spring 2015	Instructional Development Seminar, UCLA		
Fall 2015	Teaching undergrad course @ UCLA: IS 30 Information & Society		

In the space provided below, give an explanation as why you have chosen to participate in the Activities listed in your plan, i.e., explain why this plan is suited to your needs as an instructor.

I'm working on my PhD in Information Studies, and have 20 years of corporate experience. I'm working on strengthening my teaching in different ways for learners who prefer various forms of engagement. Trying to teach a wide variety of students to sense the learning styles that are most successful with different groups.

Diana A   4.23.15   BC
Instructor Signature   Date   Chief Education Officer Signature   Date

Annual_Dev_Plan.docx

Conflict of Interest Policy

Policy

This conflict of interest policy is designed to foster public confidence in the integrity of Business U, Inc., and to protect the organization's interest when it is contemplating entering a transaction (defined below) that might benefit the private interest of a Business U employee, including instructor/coaches. Business U makes transparent any real or perceived Conflicts of Interest (COI) related to educational activities and provision of disclosure by all learning-event-related planners, partners, reviewers, and personnel.

Conflicts of interest in continuing education and training arise when financial and/or nonfinancial considerations, relevant to the course content, compromise or have the potential to compromise professional judgment. The purpose of this policy is to ensure transparency in the planning, delivery, and marketing of Business U learning events and the educational activities of Business U planners and partners. The policy is in the spirit of maintaining the highest standard in educational services providing continuing education units (CEUs).

Responsibilities

All individuals involved in the planning, reviewing, and delivering of Business U learning events are responsible for disclosing potential conflicts of interest by submitting an updated Disclosure Form to the Chief Education Officer and refraining from any decision making on issues pertaining to the potential conflict of interest until a determination has been communicated in writing by the Chief Education Officer. The Chief Education Officer is responsible for maintaining a record of all disclosures for each learning event.

Every instructor/coach must submit a signed Disclosure Form at least one month prior to the start of a learning event. It is the responsibility of Business U personnel to update disclosures with any changes to relevant financial and nonfinancial relationships related to content contributions during the planning, delivery, and marketing of a learning event.

Process

The Chief Education Officer will send the required documentation to all invited or new instructor/coaches of Business U learning events. Instructor/coaches will send required documentation to educational personnel invited to participate or submitting proposals under the guidance of the Chief Education Officer.

Reference
ANSI/IACET 1-2013 Standard Category 6.4

conflict_policy.docx

Policy on Intellectual Property

Business U works with other agencies, institutions of higher learning, public schools, businesses, and other entities in preparing materials, products, instruments, devices, and services for continuing and education and training (CE/T). Whether these efforts are financially supported by Business U or by other means, it is necessary to address intellectual property rights.

Copyrights and Ownership of Deliverables
Business U shall own all goods and services created or provided in a continuing education setting. If contracted, the instructor/coach shall acknowledge Business U's funding role and ownership of all goods and products. At times, joint ownership is in the best interest of the subject being presented and should be agreed upon during planning for the topic. Also, all ownerships other than Business U are disclosed to learners before the first day of training event.

Subject to instructor/coach's right to publish the results of research and development activities, and except as otherwise required by law, the instructor/coach at all times agrees to protect confidentiality of all records and information.

Any deliverables resulting in a contract environment shall be the property of the division, and the instructor/coach shall not distribute or reproduce for profit or allow others to profit from the deliverables. A deliverable is a tangible item that is a product of the research and development activity such as a report, a guidebook, training manual, or a data set.

Deliverable items to be provided by an instructor/coach to Business U shall be limited to those items that are defined during the planning, developing, administering and delivering of the CE/T event.

Ownership of copyright in any and all copyrighted works, and ownership of all other results, including but not limited to data resulting from research and development activities, shall belong to the instructor/coach. For such non-deliverables, the instructor/coach hereby grants Business U a perpetual, royalty-free, non-exclusive, paid-up license to use, publish, and distribute these results.

Patents and Inventions
Any invention or discovery made or conceived in the performance of preparing for continuing education and training shall be owned jointly or individually by the instructor/coach and/or Business U in accordance with the following criteria:

Intellectual_Property_Policy.docx

Instructor/Coach Disclosure Form

Please complete this form as part of your Learning Event Application Packet.

1. Use the space below to disclose any proprietary interest you may have in any product, instrument, device, service, or material you plan to discuss in your learning event.

2. Do you plan to require the purchase and/or use of any of the items you have named above for participation in your class?

    If yes, will you receive compensation, either directly or indirectly, for those items?

    If so, what is the source of that compensation?

Reference
ANSI/IACET 1-2013 Standard Category 8

Instructor/Coach Self-Assessment Instrument

Introduction
Adult educators can use the optional self-assessment on the following page to determine areas for professional development. Complete this survey periodically to monitor how your priorities and skills change over time.

Directions
Competency Review each of the competencies in the column labeled "Competency"ert Scale in the column labeled "Relevant to My Teaching," indicate how relevant the competency is to your teaching. A "1" indicates very little relevance while "4" indicates a high degree of relevance.

Self-Assessment In the column labeled "Self-Assessment," assess your proficiency with the competency. Use the Likert scale to indicate the degree to which you need to improve your skills in this competency. A "4" indicates very proficient and a "1" indicates a need for improvement. Select the appropriate number from the available radio buttons.

Priority Level In the column labeled "Priority Level," assess the degree to which the competency is important to you. Use the Likert scale to rate this, where a "1" indicates a low priority while a "4" indicates a high priority.

Potential Professional Development Activities In the column labeled "Potential Professional Development Activities," brainstorm the types of professional development you would like for high-priority areas.

Reference
ANSI/IACET 1-2013 Standard Category 8

	Competency	How relevant is it to your teaching? Not at all<-------->Extremely				How competent are you? Not at all<-------->Extremely				How important is it? Not at all<-------->Extremely				Potential Professional Development Activities
I. Maintains Knowledge Base & Pursues Own Professionalism	1. Develops and maintains a knowledge base in adult learning and development.	1	2	3	4	1	2	3	4	1	2	3	4	
	2. Develops and maintains an in-depth knowledge base in own content area and in other relevant areas.	1	2	3	4	1	2	3	4	1	2	3	4	
	3. Knows how to instruct and/or refer adults who have learning disabilities and other special needs.	1	2	3	4	1	2	3	4	1	2	3	4	
	4. Knows and is sensitive to demands of adult responsibilities as workers, family members, citizens and community members.	1	2	3	4	1	2	3	4	1	2	3	4	
	5. Knows how technological systems work and how to apply that knowledge to instructional and administrative functions.	1	2	3	4	1	2	3	4	1	2	3	4	
	6. Knows about and/or knows how to access information about own organization, community resources and issues, relevant laws and regulations.	1	2	3	4	1	2	3	4	1	2	3	4	
	7. Assesses own need for professional growth and develops and monitors own professional development plan.	1	2	3	4	1	2	3	4	1	2	3	4	
	8. Engages in a variety of self-directed and collegial professional development activities and incorporates new skills and knowledge into the learning environment to enhance the quality of instruction.	1	2	3	4	1	2	3	4	1	2	3	4	
II. Organizes & Delivers Instruction	9. Plans instruction that is consistent with the program's mission and goals.	1	2	3	4	1	2	3	4	1	2	3	4	
	10. Identifies and responds to learners' individual and group needs, interests, and goals when developing instructional plans.	1	2	3	4	1	2	3	4	1	2	3	4	
	11. Creates a physical and interpersonal climate that is conducive to learning by drawing on adult learners' cultures and interpersonal dynamics.	1	2	3	4	1	2	3	4	1	2	3	4	
	12. Applies knowledge of teacher-directed and learner-centered instruction.	1	2	3	4	1	2	3	4	1	2	3	4	
	13. Models communication, navigation, decision-making, and problem-solving skills for learners.	1	2	3	4	1	2	3	4	1	2	3	4	
	14. Employs individual group and team learning.	1	2	3	4	1	2	3	4	1	2	3	4	
	15. Sequences and paces lessons appropriately.	1	2	3	4	1	2	3	4	1	2	3	4	
	16. Is sensitive to and accommodates diverse learning styles, abilities, cultures, and experiences, including learners who have disabilities and other special needs.	1	2	3	4	1	2	3	4	1	2	3	4	
	17. Provides frequent and varied opportunities for students to apply their learning.	1	2	3	4	1	2	3	4	1	2	3	4	
	18. Monitors and adjusts teaching strategies according to student needs and performance.	1	2	3	4	1	2	3	4	1	2	3	4	
	19. Effectively integrates current and appropriate media and technology as a tool for instruction.	1	2	3	4	1	2	3	4	1	2	3	4	
	20. Integrates employment, family, and community-related activities into instruction.	1	2	3	4	1	2	3	4	1	2	3	4	
III. Manages Instructional Resources (Time, Materials, Space, People)	21. Selects and uses a variety of resources for the learning environment (print, human, and technological).	1	2	3	4	1	2	3	4	1	2	3	4	
	22. Acquires, assesses, and uses technology for effective adult learning.	1	2	3	4	1	2	3	4	1	2	3	4	
IV. Continuously Assesses & Monitors Learning	23. Works with learners to identify their needs, strengths, and goals and advises or refers them to appropriate programs and levels of instruction.	1	2	3	4	1	2	3	4	1	2	3	4	
	24. Uses results of assessment data (diagnostic and needs) on a regular basis to plan lessons, develop curricula, monitor progress towards objectives, and goals, and to verify learning.	1	2	3	4	1	2	3	4	1	2	3	4	
	25. Monitors learning beyond simple recall of information, using a variety of assessment strategies.	1	2	3	4	1	2	3	4	1	2	3	4	
	26. Structures and facilitates ways for learners and peers to evaluate and give feedback on their learning and performance, through reflection and self-assessment.	1	2	3	4	1	2	3	4	1	2	3	4	
	27. Guides learners in the development and ongoing review of their educational plans.	1	2	3	4	1	2	3	4	1	2	3	4	
V. Supports Business U's Requirements & Responsibilities	28. Collects and manages accurate data for program improvement and accountability.	1	2	3	4	1	2	3	4	1	2	3	4	
	29. Suggests and/or collaborates in modifying the program organization and in developing program alternatives.	1	2	3	4	1	2	3	4	1	2	3	4	
VI. Provides Learner Guidance and Referral	30. Shares information with learners and colleagues about additional learning resources, educational opportunities and options for assessing support services.	1	2	3	4	1	2	3	4	1	2	3	4	
	31. Make referrals to appropriate resources when guidance and counseling needs are beyond own expertise.	1	2	3	4	1	2	3	4	1	2	3	4	

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Competency	How relevant is it to your teaching? Not at all<----->Extremely	How competent are you? Not at all<----->Extremely	How important is it? Not at all<----->Extremely	Potential Professional Development Activities
I. Maintains Knowledge Base & Pursues Own Professionalism				
1. Develops and maintains a knowledge base in adult learning and development.	1 2 3 (4)	1 2 (3) 4	1 2 3 (4)	Teaching more 1
2. Develops and maintains an in-depth knowledge base in own content area and in other relevant areas.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
3. Knows how to instruct and/or refer adults who have learning disabilities and other special needs.	1 2 (3) 4	1 2 3 (4)	1 2 3 (4)	
4. Knows and is sensitive to demands of adult responsibilities as workers, family members, citizens and community members.	1 2 (3) 4	1 2 3 (4)	1 2 (3) 4	
5. Knows how technological systems work and how to apply that knowledge to instructional and administrative functions.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
6. Knows about and/or knows how to access information about own organization, community resources and issues, relevant laws and regulations.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
7. Assesses own need for professional growth and develops and monitors own professional development plan.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
8. Engages in a variety of self-directed and collegial professional development activities and incorporates new skills and knowledge into the learning environment to enhance the quality of instruction.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
II. Organizes & Delivers Instruction				
9. Plans instruction that is consistent with the program's mission and goals.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
10. Identifies and responds to learners' individual and group needs, interests, and goals when developing instructional plans.	1 2 (3) 4	1 2 (3) 4	1 2 (3) 4	
11. Creates a physical and interpersonal climate that is conducive to learning by drawing on adult learners' cultures and interpersonal dynamics.	1 2 (3) 4	1 2 (3) 4	1 2 3 (4)	
12. Applies knowledge of teacher-directed and learner-centered instruction.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
13. Models communication, navigation, decision-making, and problem-solving skills for learners.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
14. Employs individual group and team learning.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
15. Sequences and paces lessons appropriately.	1 2 (3) 4	1 2 3 (4)	1 2 3 (4)	
16. Is sensitive to and accommodates diverse learning styles, abilities, cultures, and experiences, including learners who have disabilities and other special needs.	1 2 (3) 4	1 2 (3) 4	1 2 3 (4)	
17. Provides frequent and varied opportunities for students to apply their learning.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
18. Monitors and adjusts teaching strategies according to student needs and performance.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
19. Effectively integrates current and appropriate media and technology as a tool for instruction.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
20. Integrates employment, family, and community-related activities into instruction.	1 2 3 (4)	1 2 (3) 4	1 2 (3) 4	research on community-building
III. Manages Instructional Resources (Time, Materials, Space, People)				
21. Selects and uses a variety of resources for the learning environment (print, human, and technological).	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
22. Acquires, assesses, and uses technology for effective adult learning.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
IV. Continuously Assesses & Monitors Learning				
23. Works with learners to identify their needs, strengths, and goals and advises or refers them to appropriate programs and levels of instruction.	1 2 (3) 4	1 2 3 (4)	1 2 3 (4)	
24. Uses results of assessment data (diagnostic and needs) on a regular basis to plan lessons, develop curricula, monitor progress towards objectives, and goals, and to verify learning.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
25. Monitors learning beyond simple recall of information, using a variety of assessment strategies.	1 2 3 (4)	1 2 (3) 4	1 2 3 (4)	Could use a course in this
26. Structures and facilitates ways for learners and peers to evaluate and give feedback on their learning and performance, through reflection and self-assessment.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
27. Guides learners in the development and ongoing review of their educational plans.	1 2 (3) 4	1 2 3 (4)	1 2 (3) 4	
V. Supports Business U's Requirements & Responsibilities				
28. Collects and manages accurate data for program improvement and accountability.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
29. Suggests and/or collaborates in modifying the program organization and in developing program alternatives.	1 2 3 (4)	1 2 3 (4)	1 2 3 (4)	
VI. Provides Learner Guidance and Referral				
30. Shares information with learners and colleagues about additional learning resources, educational opportunities and options for assessing support services.	1 2 (3) 4	1 2 3 (4)	1 2 (3) 4	
31. Make referrals to appropriate resources when guidance and counseling needs are beyond own expertise.	1 2 (3) 4	1 2 3 (4)	1 2 3 (4)	

Business U Certified Trainers

Train-the-Trainer

Business U's Certified Trainer program has been designed to benefit individuals who are tasked with delivering training to, or manage, business-facing staff within workforce, education, and economic development organizations. This is a high impact, two-day course delivered onsite that links outcomes to continuous improvement, a process that is essential for sustainability and maximizing staff potential.

Professional development is critical to a high performing organization, therefore we can't expect a participant to go through a learning event and make immediate changes on the job. There has to be a common purpose and vision that is shared with the trainers and also resonates with the business-facing staff, so our model involves both onsite training followed-up with online coaching at Business U's eUniversity.

What makes Business U's Train-the-Trainer model unique is that the Trainer is assigned a subject matter expert to co-facilitate a highly specialized business engagement training topic. All trainer and trainee actions occurring at Business U's eUniversity are monitored and measured; thus, the training actions are reportable and available to the trainer's organization.

Day 1 Onsite: Trainer

- **Adult Learning** Principles & Characteristics
- **eLearning** Presence & Retention
- **Business Engagement** Practitioner Role
- **Purpose & Assessment**
- **Planning & Preparation**
- **Presentation & Facilitation**
- **Performance & Evaluation**
- **Continuous Improvement**

Day 1: is focused on all aspects of a trainer's responsibilities, roles, and the understanding of adult learning principles and characteristics, and as importantly, the role of a business engagement practitioner…his/her challenges and the support they will need to be successful. Trainers also learn on the first day how to navigate the online classroom, and gain access to business engagement resources and the necessary templates and report functions to implement an elearning training session.

Day 2 Onsite: Trainer

- **Business Engagement Overview**
- **B2B Strategies**
- **Data Sets for Business Engagement**
- **Business Services through Regional Partners**
- **Communications Plan and Scorecard**
- **Consultative Selling**
- **Market Penetration Using Technology and Social Media**

Day 2: is focused on how to co-facilitate a learning event with a subject matter expert at Business U's eUniversity. Participants experience a modified business engagement Boot Camp learning event. Figure 1 provides an example of the training topics the trainers will be exposed to, in order to familiarize them with business engagement activities.

Included in the Train-the-Trainer two-day learning event:

- 16 hours of onsite training with two facilitators
- 4 hours of live coaching at Business U's eUniversity with subject matter experts
- Business engagement Train-the-Trainer toolkit

CATEGORY 7

CONTENT AND INSTRUCTIONAL MATERIALS

7.1 The Provider has a process in place to ensure the selected content logically supports the learning outcomes.

The planning and development policies and processes described in the previous sections culminate in the Business U Learning Event Design Document, which was created to help the Chief Education Officer ensure that all learning event content and instructional methods are appropriate for each learning outcome they support.

7.2 The Provider demonstrates that instructional methods are appropriately matched to achieve the learning outcomes.

The material and training provided to Instructors/Coaches draws heavily from Bloom's Taxonomy, as well as other key instructional design resources to aid those who develop, plan, implement, and review Business U learning events in matching instructional methods to learning outcomes. Again, the Learning Event Design Document is well-suited to this objective. Further, learners are informed of the intended learning outcomes for each modules within every Business U learning event through multiple channels of communication, including registration materials, initial welcome/orientation presentations, learning event promotional materials, and follow-up correspondence.

7.3 The Provider demonstrates that instructional methods accommodate multiple learning styles, and that, by their very design, these methods promote interaction between and among learners, instructors and learning resources, to achieve the stated learning outcomes.

Business U relies on the CET Needs Analysis to inform the development of the Learning Event Design Document with respect to learning styles and instructional design that promotes interaction among learners, instructors/coaches, and other learning resources. Business U learning events incorporate mulitple learning styles to achieve instructional objectives, including the accommodation of needs solicited from learners in the Pre-Learning Event Questionnaire.

7.4 Instructional delivery shall include discussion of learning outcomes and requirements to earn CEUs at the beginning of the learning event.

The Business U Learning Event Catalog provides detailed description of content, intended learning outcomes, prerequisites, requirements, event duration, target learner audience, methods of instruction and evaluation, and CEUs that may be earned as a result of completing the learning event as stipulated in the Policy on Attendance & Assessment. This information is also maintained on the Business U website and in promotional materials and email communications. All Business U learning events begin with an explicit articulation of the intended learning outcomes and CEU requirements. In addition, learners receive a course syllabus with these details.

WHAT'S NEXT?

Evidence of compliance with Category 7

Learning Event Design Document Example
Learning Outcomes Communication Example
Learning Outcomes Presentation Slide
Business U Catalog Description Example

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Instructional Design Document

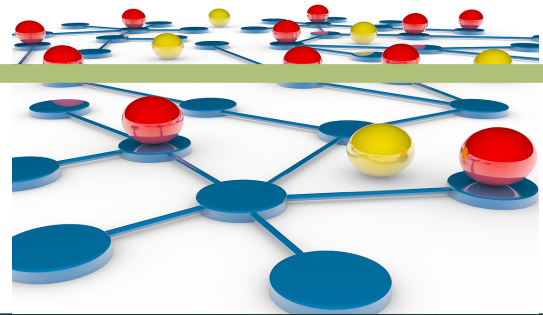## Learning Event: **Business Engagement Boot Camp**

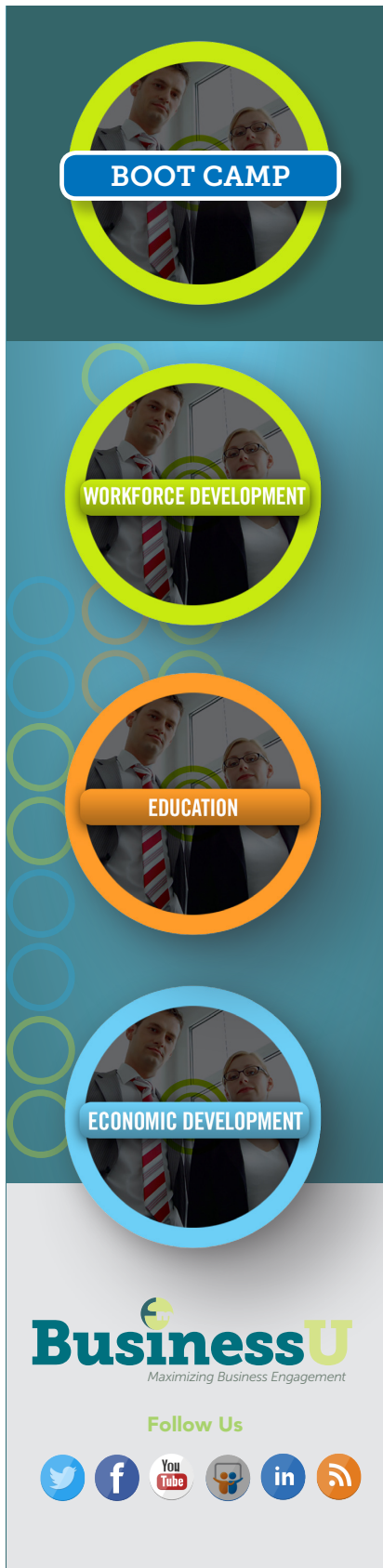| Instructional Designer	Supporting Leadership Team	Champions	Target Audience
Christine Bosworth, Ed.D Co-founder	Celina Shands Gradijan Co-founder	➢ Public Workforce System ➢ Community Colleges: Career & Technical Education Workforce & Economic Division ➢ Economic Development Agencies ➢ Chambers of Commerce ➢ Small Business Development Centers	Workforce, education and economic development leadership and employer-facing staff who engage with small, medium and large employers either as a customer with a portfolio of business services, as a partner to collaborate on sector strategies and curriculum design, and/or as a funder through social investment initiatives.
	Subject Matter Experts		
	Christine Bosworth Celina Shands Gradijan		

Summary Needs Assessment	Goal	Learning Outcomes
Under the Workforce Innovation & Opportunity Act, recently signed into law by President Obama on July 22, 2014, workforce leadership and business services staff are charged to strengthen their connection to employers by identifying their employment needs through strategically planned outreach efforts and communication methods to encourage employers to support their utilization and participation in the local workforce and economic system. This requires a revisit of critical organizational components to develop and motivate an effective, market-responsive business engagement team that is regionally collaborative and that can engage a diverse range of employers, as well as use innovative technology tools to manage customer and partner relationships within workforce, education and economic development.	Introduce participants to Business U's market responsive, customer-centric framework to maximize engagement of businesses as a partner (in sector strategies), as a customer (with business services), and as a funder (through social investment initiatives).	➢ Identify the components of a market responsive business engagement team. ➢ Create a list of key data points needed for business engagement outreach. ➢ Apply a communication platform formula by developing three key "message points" to engage businesses. ➢ Differentiate the three main differences between a "solutions" and a "show and tell" selling approach. ➢ Examine five technology strategies that are best used for engaging business as a customer or partner.

Design Document Learning Event: Business Engagement Boot Camp 1.0 – Updated: April 2015

BusinessU

Learning Objectives

➢ Identify the components of a market responsive business engagement team

➢ Create a list of key data points needed for business engagement outreach

➢ Apply a communication platform formula by developing three key message points to engage businesses

➢ Describe the three key differences between the solutions and show-and-tell selling approaches

➢ Examine five technology strategies that are best used for engaging businesses as customers or partners

Boot Camp
Maximizing Business Engagement Overview

Delivered in a one-day (8-hour), onsite format followed by two (2) hours of coaching in our **eUniversity**. This learning event trains participants in Business U's market responsive, customer-centric framework needed to reengineer your employer/business engagement team, and includes training materials and toolkit, plus an Implementation Webinar with Live Chat Coaching to ensure all training materials are fully understood and implemented.

Topics include:

- Establishing the Right Data Sets for Business Engagement & Services
- Branding & Packaging
- Consultative Selling Processes
- Using Technology for B2B Outreach

Outcomes:

Upon the completion of this learning event, participants will be able to:

- Identify the components of a market responsive business engagement team.
- Create a list of key data points needed for business engagement outreach.
- Apply a communication platform formula by developing three key "message points" to engage businesses.
- Differentiate the three main differences between a "solutions" and a "show and tell" selling approach.
- Examine five technology strategies that are best used for engaging business as a customer or partner.

CATEGORY 8

ASSESSMENT OF LEARNING OUTCOMES

8.1 The Provider provides evidence of the assessment methods used to determine whether learners have achieved each of the planned learning outcomes selected during event planning.
During the development and planning of Business U learning events, an assessment method is selected for each learning outcome. These methods are used to determine whether the learning outcomes have been achieved. Business U uses action plans, instructor observation, attendance, and completion of an end-of-course evaluation as the bases for assessing whether (1) the learning outcomes have been achieved, and (2) the learner will be awarded CEUs.

8.2 Assessment methods measure the achievement of learning outcomes.
Assessment methods used in Business U learning events must be designed to elicit the demonstration of learner mastery of knowledge and skills identified for each learning event and must be complete before learners are awarded credits. Business U assessment methods incorporate performance criteria to identify evidence that learners have or have not achieved the learning outcomes. Appropriate matching of assessment method to learning outcome is an essential part of the Learning Event Design Document, which serves to ensure Business U learning events consistently use appropriate assessment methods that correlate to learning outcomes.

8.3 The Provider has a process in place whereby learners are given feedback on their mastery of learning outcomes.
Instructors/Coaches commit to providing feedback to every learner, as detailed in the Instructor/Coach Agreement. Feedback is incorporated into lesson interactions and follow-up assessments. In cases of learner failure to achieve learning outcomes, the Chief Education Officer communicates directly with the learner to discuss options to help the learner succeed. Throughout the learning event, short-answer questions at the end of each module also serve to provide learner feedback; Instructors/Coaches frequently poll learners to assess learner understanding in real time, which affords the opportunity to modify the agenda to ensure learning outcomes are achieved. Finally, awarding of CEUs is the ultimate feedback on learner achievement.

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WHAT'S NEXT?

Evidence of compliance with Category 8

Learning Event Design Document Example

Unit On-site	Time Allotted (minutes)	Purpose	Outcome (Cognitive Level)	Instructional Materials	Method & Learning Style	Assessment & Performance Criteria	
Overview	30	To define "Business Engagement" and the new law (WIOA) that governs it; and to provide an overview of the components required to implement an "ideal state" for an effective business engagement team.	**Identify** the components of a market responsive business engagement team. (Comprehension)	Course Outline PowerPoint Screen Laptop Speakers Flip Chart and post-it-notes to record key phases	Presentation Discussion • Auditory • Visual **Individual Activity** Business Engagement self-assess survey	✓ Attendance mandatory and recorded by facilitator ✓ Completed Survey ✓ Self-assess survey and compare it to Facilitator's "Ideal State" checklist	No pre-work
Unit On-site	Time Allotted (minutes)	Purpose	Outcome (Cognitive Level)	Instructional Materials	Method & Learning Style	Assessment & Performance Criteria	
Module 1 *Establishing the Right Data Sets for Business Services*	85	To introduce participants to the first step in reengineering the business services team; by collecting the correct market data to understand the market needs of employers, business and industry, as well as their needs and motivations to take action.	**Create** a list of key data points needed for business engagement outreach. (Synthesis)	PowerPoint Screen Laptop Speakers Flip Chart and post-it-notes to record key phases End of Module 1 Survey	Presentation Discussion • Auditory • Visual **Small Group Activity** Develop a list of regional partners outside the workforce system • Auditory • Visual • Kinesthetic **Small Group Activity** Develop a needs assessment instrument • Auditory • Visual • Kinesthetic	✓ **Q & A Knowledge check** ✓ **Group Presentations** Facilitator will use a rubric to assess the Needs Assessment instrument from the small group activity for appropriateness and aptness and to provide feedback after each small group presentation.	No pre-work End of Mod 1 Survey

Design Document Learning Event: Business Engagement Boot Camp 1.0 – Updated: April 2015

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Unit On-site	Time Allotted (minutes)	Purpose	Outcome (Cognitive Level)	Instructional Materials	Method & Learning Style	Assessment & Performance Criteria	
Module 2 *Branding & Packaging Business Services*	80	To understand that a brand strategy goes well beyond a logo; and that it is the foundation for any organization to support the marketing and positioning of its products and services.	**Apply** a communication platform formula by developing three key "message points" to engage businesses. (Application)	PowerPoint Screen Laptop Speakers Flip Chart and post-it-notes to record key phases End of Module 2 Survey	Presentation Discussion • Auditory • Visual **Small Group Activity** Develop and practice elevator speech • Auditory • Visual • Kinesthetic **Small Group Activity** Develop a communication platform include 3 key message points for each market segment • Auditory • Visual • Kinesthetic	✓ **Q & A Knowledge check** ✓ **Group Presentations** Facilitator led peer review and critique of the communication platform from the small group activity. Participants are given a rubric to use for evaluation and feedback.	No pre-work End of Mod 2 Survey

Design Document Learning Event: Business Engagement Boot Camp 1.0 – Updated: April 2015

Unit On-site	Time Allotted (minutes)	Purpose	Outcome	Instructional Materials	Method & Learning Style	Assessment & Performance Criteria	
Module 4 *Improving Market Position*	90	To understand that Improving market position means that employers/ businesses are aware of the organization, understand the mission of the business services team, and value the service mix. This requires not only understanding one-to-one relationship building, but also one-to-many relationship strategies by using technology and social media tools to build relationships effectively that will generate new leads and prospects.	**Examine** five technology strategies that are best used for engaging business as a customer or partner. (Application)	PowerPoint Screen Laptop Speakers Social Media Planning Template Case Study CRM Tool Flip Chart and post-it-notes to record key phases End of Module 4 Survey	Presentation • Auditory • Visual **Small Group Activity** Develop a social media plan • Auditory • Visual • Kinesthetic **Demonstration** CRM tool • Auditory • Visual	✓ **Q & A Knowledge check** ✓ **Group Presentations** Facilitator will use a rubric to assess the social media plan from the small group activity for appropriateness and aptness and to provide feedback after each small group presentation	No pre-work End of Mod Surve
Unit On-site	Time Allotted (minutes)	Purpose	Outcome	Instructional Materials	Method & Learning Style	Assessment & Performance Criteria	
Module 3 *Consultative Selling & Business Outreach*	90	To expose participants to an effective business services approach using the five steps involved to fully engage a business or employer prospect as a customer or partner. The five steps include: Prospecting; Outreach; Consultation; Solutions Selling; and Engagement.	**Differentiate** the three main differences between a "solutions" and a "show and tell" selling approach. (Analysis)	PowerPoint Screen Laptop Speakers Script Guidelines C-level Chart Five-step map template Flip Chart and post-it-notes to record key phases End of Module 3 Survey	Presentation Discussion • Auditory • Visual **Small Group Activity** Develop cold-calling introduction script • Auditory • Visual • Kinesthetic **Small Group Activity** Develop your compelling reason outline • Auditory • Visual • Kinesthetic	✓ **Q & A Knowledge check** ✓ **Group Presentations** Facilitator led peer review and critique of the cold-call introduction script from the small group activity. Participants are given a rubric to use for evaluation and feedback. ✓ **Group Presentations** Facilitator will use a rubric to assess the group's "compelling reason outline" from the small group activity for appropriateness and aptness and to provide feedback after each small group presentation	No pre-work End of Mod 3

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CATEGORY 9

AWARDING CEUS & MAINTAINING LEARNER RECORDS

9.1 The Provider has a process in place to identify and inform learners if they have met the established criteria for successful completion of each learning event, and if they qualify for CEUs.

Business U has a policy and process in place to identify and inform learners about their fulfillment of the requirements for earning IACET CEUs on completion of Business U learning events. Eligibility for IACET CEUs is contingent on adherence with the Policy on Attendance and Assessment; each learner must complete the assessment and attendance requirements in order to be awarded CEUs for a Business U learning event. The procedure for awarding CEUs following a Business U learning event is built into the eUniversity online learning management system (LMS). This process occurs in real time to enable the printing and physical delivery of certificates of completion on the final day of the learning event, which (1) eliminates the need for post-learning event certificate mailing costs, and (2) supports an immediate sense of accomplishment for learners.

The Chief Education Officer is responsible for overseeing the consistency of Business U learning event sign-in sheets with the LMS attendance record, updating CEU Attendance Verification Forms, maintaining the records (physically and electronically), and issuing transcripts and certificates of completion.

Learners are informed about the procedure for earning CEUs prior to and at the beginning of each learning event. Learners who fail to follow proper CEU procedures may not be awarded CEUs. Improper verification of attendance results in voiding of CEUs. In the event a learner has not met the requirements to earn CEUs, he/she is notified electronically via email, as well as through the LMS message center.

Learners are informed about the organization's policies in promotional materials, during the session wrap-up period, and via follow-up email.

9.2 The Provider maintains a learner record system, including backup, containing all required information.

It is the policy of Business U to maintain current and complete learner records that include attendance information, as well as satisfactory completion of all CEU-approved programs. Learner records are available to learners through the eUniversity system, and also are provided to the learner on request. These records contain information on all Business U learning events for which the learner was registered.

Business U relies on the eUniversity LMS for the administration, documentation, tracking, reporting, and delivery of components of its learning events. Business U creates, maintains, and provides access to CET records through the eUniversity system for a minimum of seven years, in accordance with its Record Retention Policy. The eUniversity database is backed up at least weekly, and often more frequently, to ensure redundancy in the storage of learner records. In addition, if and when Business U becomes an Accredited Provider of IACET CEUs, the Chief Education Officer will explore provision of learner transcripts to the American Council on Education Registry and Transcript System for IACET Accredited Providers.

9.3 The Provider has a policy in place for ensuring the privacy and information security of learners' records.

Business U maintains a record of the CEUs awarded to each learner, in accordance with its Policy on Awarding CEUs, Record Retention Policy, and Learner Privacy Policy. Learner records are the property of Business U and are considered confidential. Access to the information they contain is restricted to Business U staff who have a legitimate reason to review information as assessed by the Chief Education Officer.

Learner information is released *only* to the learner immediately following the learning event and at the learner's request for the following seven (7) years through the eUniversity LMS. CEU records are made available to the learner using a unique user name and password to ensure that only the learner has access to his/her information. In addition, records may be obtained by learners on submission of a Record Release Request to the Chief Education Officer.

WHAT'S NEXT?

Evidence of compliance with Category 9

Policy on Awarding CEUs
Policy on Attendance & Assessment
Learner Transcript Example
Record Retention Policy
Certificate of Completion Examples
(pre- and post-accreditation versions)
Learner Privacy Policy
Record Policy Communication to Learners
Record Release Request Form

Policy on Awarding CEUs

Policy
Business U maintains a complete, permanent record of each learner's attendance and satisfactory completion of CEU requirements.

Purpose
As a prospective IACET accredited CEU provider for learning events, Business U has instituted policies and procedures to ensure compliance with Category 9 of the ANSI/IACET 1-2013 Standard for Continuing Education and Training for Awarding CEUs and Maintaining Learner Records. Additionally, it is the responsibility of Business U to offer high quality, well organized learning events to support the professional development of the employees for whom Business U provides continuing education and training courses. To that end, it is necessary to provide learners with a fair, consistent process for CEU requirement completion, award, and learning event attendance.

Process
The following procedure is used to document each learner's attendance and satisfactory completion of CEU requirements, as well as to create and maintain a permanent record of that documentation.

1. A learner's online learning event enrollment triggers the creation of a CEU Management Record on the Business U eUniversity education platform.
2. An attendance roster is generated by the LMS for each learning event module. When each session begins, the Instructor/Coach circulates this roster for eah learner to sign and provide requested information as appropriate. Ten minutes prior to the end of the session, the Instructor/Coach circulates the roster again; every learner must sign the document on both occasions to be eligible for CEUs.
3. Once the roster is collected, the signatures are checked against the names on the CEU Attendance Verification Form, and signed by the Instructor/Coach.
4. If it becomes apparent during the learning event that a student has not met specific CEU requirements and will not "complete" the session, the Instructor/Coach will contact the Chief Education Officer, who will communicate options to the learner.
5. Special circumstances requests—such as illness or family emergency—for partial CEU awards will be evaluated on a case-by-case basis by the Chief Education Officer.
6. At the end of the learning event, each learner who has complied with the Policy on Attendance & Assessment and who has completed satisfactorily will receive a certificate of completion that indicates the number of CEUs awarded to the learner.
7. The attendance verification forms and rosters will be scanned for storage in the Business U eUniversity database as evidence of awarded CEUs for the each learner's permanent electronic record.

8. Hard copies are filed alphabetically by last name, separated by year to be used as back up evidence of CEU awards for a period of seven years. These records may be kept on- or off-site in locked file cabinets.

9. After all data is uploaded to the electronic record system, learners are reminded about the availability of their records on the eUniversity system in the post-learning event follow-up email.

References

ANSI/IACET 1-2013 Standard Category 9

Policy on Attendance and Assessment

Policy

It is the policy of Business U that each learner must successfully complete the assessment and attendance requirements in order to be awarded CEUs for a learning event.

Procedure for Awarding CEUs

1. The learner must complete the assessment of mastery of the learning outcomes (as identified in the learning event planning process).
2. The learner must meet the minimum attendance requirements for earning CEUs.
3. The Chief Education Officer evaluates the submission materials, mastery assessment, and attendance report to ensure all criteria have been met. The Chief Education Officer then notifies the learner via email as to whether CEUs have been earned.

Reference

ANSI/IACET 1-2013 Standard Category 8

Policy_on_Attendance_and_Assessment

Business U Official Transcript

Learner: Luis Ejemplo   Date of Birth: 21-Aug-78

Course Code: 146

Business Engagment Boot Camp   **CEUs Awarded: .825**

Course Description: Delivered in a one-day (8-hour), on-site
format, this learning event trains learners in Business U's
market-responsive, customer-centric framework for
reengineering your employer/business services team, and
includes training materials and a toolkit.

Enrollment Number: 847596   Start Date: 7-Nov-1
Status: Active   Completion Date: 19-Nov-1

Record Retention Policy

Policy

It is the policy of Business U that its records be retained only so long as they are (1) necessary to the current conduct of the organization's business; (2) required to be retained by statute or government regulation; or (3) relevant to pending or foreseeable investigations or litigation. In furtherance of this policy, the organization has adopted the attached Record Retention Schedule and the following principles and procedures for its Record Management Program, which shall be strictly observed by the organization, its officers, Advisory Board, staff, and committee members.

1. The responsibility for administering the organization's Record Management Program in accordance with this policy is designated to the Chief Education Officer. Destruction of specific records shall be carried out only in accordance with the authority of the Chief Education Officer.

2. All records, including those maintained on electronic data processing storage media, shall be covered by this policy.

3. Despite any retention periods specified in the attached Record Retention Schedule, all records shall be retained for at least the minimum period as stated in applicable state or federal laws and/or regulations. Once the period for office retention of records has passed, a determination will need to be made whether the records should be archived or destroyed.

4. The destruction of records shall be suspended immediately upon receipt of legal process or other notice of pending or foreseeable investigations or litigation, whether government or private. In addition, upon such notice, all of the organization's records shall be secured immediately in order to prevent deliberate destruction of documents. No such suspension of the organization's Record Management Program shall be lifted except upon the written authorization of legal counsel.

5. Requests for exemptions from the Program should be submitted to the Chief Education Officer and legal counsel. Exemptions will be given only in accordance with the basic objectives of this Policy Statement.

6. The Chief Education Officer, with the assistance of legal counsel, shall be responsible for interpreting this Policy Statement for application to specific situations.

/Policy_on_Attendance_and_Assessment

BU

Business U Record Retention Schedule

Type of Record	Retention Period*
Accounting	
Auditor's reports/work papers	Permanent
Bank deposit slips	3 years
Bank statements, reconciliations	7 years
Budgets	2 years
Canceled checks, generally	7 years
Cash disbursements journal	Permanent
Cash receipts journal	Permanent
Depreciation records	3 years*
Dues and assessment schedules	2 years*
Employee expense reports	3 years
Employee payroll records (W-2, W-4, annual earnings records, etc.)	6 years*
Employee pension records, including service, eligibility, personal information, pensions paid	6 years*
Employee time cards/sheets	4 years
Financial statements (annual)	Permanent
Financial statements (interim/internal)	3 years
General journal or ledger	Permanent
Inventory lists	3 years
Invoices	3 years
Payroll journal	4 years
Petty cash vouchers	3 years
Corporate records	
Annual reports	Permanent
Articles of Incorporation	Permanent
Bylaws	Permanent
Application for Recognition of Exemption (Form 1024 or 1023), including related correspondence and determination letter	Permanent
Qualifications to do business	Permanent
Minutes and resolutions (Board and Committees with Board authority)	Permanent
Minutes (Committees without Board authority)	3 years
Authorizations and appropriations for expenditures	3 years

record_retention_policy.docx

Policies and procedures, generally	For life of policy/procedure
Policies and procedures, employment practices	10 years*
Conflict of Interest Forms	2 years
Contracts	
Contracts, generally	10 years*
Contracts, government	4 years*
Contracts, sales (UCC)	4 years*
Insurance	
Accident Reports	6 years
Insurance Claims	6 years*
Insurance Policies	6 years*
Intellectual property	
Copyright registrations and unregistered copyrightable materials	Permanent
Trademark registrations	Permanent
Patent	Permanent
Domain name registration	For life of domain name
Personnel	
Applications	1 year
Employee files	6 years*
Employment contracts	10 years*
Garnishments	5 years
Medical or exposure to toxic substances records	30 years*
Pension, profit sharing plans	Permanent
Government reports	6 years
Time cards/sheets	4 years
Real estate	
Leases	10 years*
Purchases, including title abstracts, opinions, insurance policies, sales agreements, mortgages, deeds	20 years after sale
Research materials	
Research reports and data analysis	Permanent (final report only)
Underlying data, documentation, coding and analysis	Indefinite (review every 2 years); retain only portions necessary to

record_retention_policy.docx

BU

	document validation of the report
Data confidentiality, vendor and other research contracts	10 years*
Survey forms	
Blank	Indefinite(review every 2 years)
Completed	Until publication of final report to which it relates
Statements of policy/position	
Policy statements	For the life of the document
Testimony and final comments on rulemakings and legislation	Permanent
Press releases	1 year, except if retained for historical archive purposes
Drafts, comments, etc. prepared in the policy or comment development process	Until publication of the document to which it relates
Membership	
Admissions application files	
Approved	Until date of admission
Denied	1 year*
Terminations and resignations	1 year*
Ethics and disciplinary action files	
Files in which action was taken	1 year*
Files closed without action	30 days*
Member surveys	For the life of the document
Taxes	
Annual information and/or income tax returns and canceled checks (federal, state and local)	Permanent
Payroll tax returns	4 years
Property tax returns	Permanent
Sales and use tax returns	4 years
General	
Supporting correspondence and notes	For life of principal

record_retention_policy.docx

regarding patents, copyrights, licenses, agreements, bills of sale, permits, contracts, liabilities, etc.	document which it supports
Correspondence not relating to other categories	1 year
Marketing and promotional materials, including brochures, Web site content	For the life of the materials to which it relates
Consents and "opt-out" request for facsimile and email solicitation	For life of consent or request
Historical archives (e.g., presidential speeches)	Permanent
Standards materials	
Adopted standards	Permanent
Proposed standards, ballots, comments, etc.	For life of standard to which it relates
Legal	
Claims and litigation files where organization is a party	10 years*
Documents related to third-party subpoenas	30 days after final resolution of underlying action

* An asterisk following a number signifies that the retention period begins after final determination, payment, settlement, expiration, termination, decision, etc.

Reference
ANSI/IACET 1-2013 Standard Category 9

record_retention_policy.docx

current certificate

Business U
Maximizing Business Engagement

Certificate of Completion

This certificate is awarded to

TONY RIVERS

in recognition of successfully completing

BUSINESS RETENTION & ENGAGEMENT STRATEGIES FOR SOUTH BAY CITIES

JANUARY 28, 2015

Christine Bosworth, Ed.D
Co-founder & Chief Education Officer
Business U

Celina Shands Gradijan, M.S.
Co-founder, Business U

CEUs Awarded: .825
Completion Date: 01/28/15
Certificate Number: 1938246

Business U, Inc., has been accredited as an Accredited Provider
by the International Association for Continuing Education and Training (IACET),
1760 Old Meadow Road, Suite 500, McLean, VA 22102; (703) 506-3275.

ACCREDITED IACET PROVIDER

BusinessU
Maximizing Business Engagement

Certificate of Completion

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ACCREDITED IACET PROVIDER

BU

Learner Privacy Policy

Policy

It is the policy of Business U to maintain current and complete learner records including attendance information and satisfactory completion of all CEU-approved programs. These records are provided to the learner on request and contain information on all Business U-sponsored CEU events. In addition, it is an essential element of the CEU program to maintain learner privacy.

Process to maintain learner privacy

Business U maintains detailed records for all learners who participate in learning events with CEUs. Learner records are the property of Business U and are considered confidential. Access to the information they contain is restricted to Business U staff who have a legitimate reason to review information.

Business U, at the direction of the Chief Education Officer, will release learner information only directly to the learner immediately following the learning event and at the learner's request for the following seven (7) years. To protect learner privacy, Business U will not release information to a third party, even at the request of the learner.

CEU records are made available to the learner using a unique user name and password to ensure that only the learner has access to his/her information.

Records Management Process

Business U personnel, under direction of the Chief Education Officer, are responsible for updating CEU Attendance Verification Forms, maintaining the records (physically and electronically), and issuing Transcripts and Certificates of Completion.

Learners who fail to follow proper CEU procedures will not be awarded CEUs. If attendance is verified improperly, the CEUs will be voided and learner(s) do not receive CEUs.

Learners will be informed of the proper CEU procedures to follow to earn CEUs prior to the learning event in promotional material and during the learning event on the CEU Attendance Verification Form, as well as at the beginning of each session.

In the event a learner has not met the requirements to earn CEUs, he/she will be notified electronically via email.

/Learner Privacy Policy

Hello, Boot Campers!

Celina and I enjoyed the business engagement Live Chat sessions with you last week! We want to remind you that Business U keeps your eUniversity records and transcript for seven years. You can access your transcript any time by logging in to Business U's eUniversity at http://businessuonline.com. To review our record retention and information security policies, visit http://businessuonline.com/policies.

Please stay in touch to let us know how you're implementing aspects of the learning event experience in your work!

Best,

Christine

P.S. You received your login credentials via email when you registered for Boot Camp. If you can't locate your login credentials, send me an email and I will forward you the custom access email.

Christine Bosworth, Ed.D
Co-founder, Business U
Los Angeles, CA 90024
P: (310) 800-3353
F: (310) 693-5329
E: Christine@Business-U.net
www.Business-U.net

Record Release Request

All Business U learners have the right to review their educational records. Please complete, sign, and submit this form to request a copy of your eUniversity transcript.

Transcript requests may be mailed, faxed, or attached to email and sent to:

Dr. Christine Bosworth
Chief Education Officer
Business U
10920 Wilshire Blvd #150-9111
Los Angeles, CA 90024
Tel: 310.800.3353 // FX: 310.693.5329
Email: christine@business-u.net

First Name: _____

Last Name: _____

Mailing Address: _____

_____

Phone Number: _____

Fax Number: _____

Email Address: _____

How do you want your transcript sent?   ☐ Mail   ☐ Email

I authorize the release of my CEU transcript to the address listed above.

_____   _____
Signature   Date

Reference
ANSI/IACET 1-2013 Standard Category 9

/Record_Release_Request.docx

CATEGORY 10

PROGRAM EVALUATION

10.1 The Provider has a process in place for the systematic evaluation of learning events. The evaluation is comprehensive and addresses the total learning experience to include data collection about the learning event.

Business U has a process for systematic evaluation of all learning events, which includes data analysis conducted to identify opportunities for improvement in each phase of the learning event: development, planning, delivery, and review phases.

10.2 The Provider conducts timely post-program reviews of the evaluation results, and ensures they are incorporated into a continuous improvement process for learning events. Process for post-program review

Business U uses the following four-phase effort for post-learning event evaluation as part of its continuing improvement efforts:

- Standardized learner evaluations at learning event end
- Survey of graduates after three months
- Academic program reviews by the Chief Education Officer
- Distribution of data analysis to instructors/coaches and other staff involved with the development and delivery of learning events

10.3 The Provider has a process in place for providing program evaluation results to instructors and other individuals involved in the event planning.

One of the last requirements for the learners on the final day of training is to complete a course evaluation form that focuses on outcomes stated and met, course content and flow, facility feedback, and instructor/coach reviews. All learning event evaluations are entered into a database. The summarized evaluations are analyzed to make sure that course outcomes were appropriate and accomplished, and feedback is given to instructors/coaches and others involved with learning event development and planning as a part of Business U's commitment to continuing improvement.

BU

In addition to learner evaluations, instructors receive feedback from the Chief Education Officer. Business U maintains a database to help identify potential trends and issues. Through data analytics, changes in perceived instructor/coach performance is noted, facilitating focused conversations. The instructor/coach evaluation covers the following observable instructor/coach behaviors and learner outcomes:

- Demonstrated knowledge of the subject matter
- Conveyed knowledge of the subject matter and followed an appropriate sequence of presentation
- Consistently met learning outcomes and learner expectations
- Provided participants adequate opportunity to ask questions and get satisfactory answers,
- Participants' demonstrated comprehension of the material through interaction, class discussion, workshop exercise, quizzes, and/or other assessment methods

WHAT'S NEXT?

Evidence of compliance with Category 10

Continuous Improvement Policy
Continuous Improvement Process Action Plan
Completed Learning Event Evaluations
Learning Event Evaluation Summary
Analysis of Learning Event Evaluation Summary

Continuous Improvement Policy

Purpose

This policy is designed to put in place a continuous improvement approach to the management of Business U's operations and people—both staff and learners. Business U undertakes ongoing quality control and evaluation of all its operations to ensure maintenance of standards appropriate to the expectations of the community, including the ANSI/IACET 1-2013 Standard for continuing education and training.

Quality and continuous improvement at Business U

Business U's approach to quality encompasses all its operations including governance, academic services, learner services, financial operations, facilities, human resources, and occupational health and safety. Business U's quality system is based on adherence to the following principles:

- A commitment by all staff to continuous improvement of processes, learning events, products, relationships, and services
- Input and involvement of all staff and students in identifying and implementing quality improvements
- Systematic use of qualitative and quantitative feedback as the basis for identifying and prioritizing improvement opportunities.

Scope

Opportunities for continuous improvement derive from varied sources:

- Formal and ad hoc feedback from learners, instructor/coaches, and other stakeholders
- Complaints from learners, instructor/coaches, and other stakeholders
- Annual self-assessment against the ANSI/IACET 1-2013 Standard
- Assessment validation on a per term basis
- Internal and external professional development workshops

Sources of relevant data for continuous improvement

Feedback and evaluations

Learners and instructor/coaches are encouraged to provide feedback about the quality of Business U's learning events, facilities, and resources.

Complaints

When Business U receives a complaint it is dealt with under the Grievance Resolution Procedure. Any areas for improvement that may arise through handling a complaint are

/Policy_on_Attendance_and_Assessment

BU

documented in the Business U Continuous Improvement Log. If an improvement is based on a complaint, it is logged in the Business U Complaints Register.

Self-assessment/Internal Audit
Business U carries out a self-assessment against the ANSI/IACET 1-2013 Standard to measure compliance and highlight opportunities for improvement. A timely review of all policies and procedures is also carried out at this time. The following personnel are responsible for self-assessment/internal audit in their particular area of responsibility:

Marketing: Diana Ascher, Director of Education
Finance/Admin: Celina Shands Gradijan, Co-Founder
Academic: Christine Bosworth, Chief Education Officer and Co-Founder
Facilities: Christine Bosworth, Chief Education Officer and Co-Founder

These individuals are committed to supporting the the alignment of the organization toward Business U's goals and objectives, as well as the satisfaction and welfare of learners, staff, and other stakeholders.

Unsolicited feedback
Any employee or client of Business U may provide unsolicited feedback on the services or operations of the organization. Staff and learners also are encouraged to provide anonymous feedback, if desired.

Ad hoc continuous improvement working groups
Business U establishes ad hoc working groups or teams to improve functions that are in need of action or improvement. Recent examples of these have been the eUniversity UX Team, the Self-Assessment Integration Team, and the Client Canvassing Team. The eUniversity UX Team has implemented changes to the online interface for ease of use and efficiency. The Self-Assessment Integration Team has worked to educate Business U stakeholders, and implemented policies and processes that support adherence to the ANSI/IACET 1-2013 Standard (an example of which you are reading now). The Client Canvassing Team has impemented a new long-term opportunity to collect information from corporate and government clients on the effects of Business U learning events on the performance of learner groups.

Internal and external workshops
Department heads and various Business U staff are sent to attend various workshops run by Department of Education, IACET, and other relevant agencies. Each person sent out for training is responsible for extending the reach of their educational experience by holding informal workshops for colleagues at Business U to ensure that the information (best practices, new approaches, technological tools, etc.) is distributed throughout the organization. By inculcating this practice into Business U's corporate culture, individual professional development is amplified to influence corporate norms for the

Continuous_Improvement_Policy.docx

development, implementation, and assessment of high-quality learning events that support Business U's mission.

Assessment Validation

Business U has a policy and procedure for undertaking assessment validation regularly and any improvements identified are documented and actioned. Old assessments that do not meet current standards are removed from the subject files. Business U validates all the assessments of all units during the training package life cycle.

Industry Consultation & Participation

Business U consults with relevant industries to improve the training and assessment process. Industry consultation is carried out with industry authorities such as the IACET, the U.S. Department of Education, and several regional workforce development agencies. This consultative process is an important contributor to Business U's ongoing strategic development, and includes speaking with key personnel at industry agencies about our learners' needs, curricula, and assessments. Business U also invites industry expert guest speakers for informal talks with its employees and partners on timely topics that may inform our continuous improvement.

Recordkeeping

A Continuous Improvement File is maintained and includes:
- A copy of the Continuous Improvement Policy and Procedure
- A copy of the Continuous Improvement Register
- Agendas and minutes of Continuous Improvement Committee meetings
- Version control register master

Records of all continuous improvement activity shall be maintained for a period of at least two years after the continuous improvement action has been completed to allow for review by Business U management and external auditors.

Continuous Improvement Communication Process

Management holds a quarterly meeting during which continuous improvement issues deriving from feedback, complaints, or as part of internal audits are discussed and documented. When appropriate, action plans are developed and responsibilities assigned to support issue resolution. Minutes of the meeting are documented and posted to eUniversity for the edification of relevant staff.

Reference
ANSI/IACET 1-2013 Standard Category 10

BU

BusinessU
Maximizing Business Engagement

Business Engagement Boot Camp
Onsite Learning Event: Regional Cohort 2
Survey
November 7, 2014

Please give your anonymous assessment of the onsite Business Engagement Boot Camp learning event. Your thoughtful and objective responses to each question are a highly valued part of Business U's facilitation and learning continuous improvement process. Thank you.

Using the scale below where (1) = <u>Strongly Disagree</u> and (5) = <u>Strongly Agree</u>
Circle your level of agreement with the following statements:

Strongly Disagree	Disagree somewhat	Neutral	Agree somewhat	Strongly Agree				
(1)	(2)	(3)	(4)	(5)				
The learning event met my expectations.				1	2	3	4	⑤
The subject matter was well organized.				1	2	3	4	⑤
The materials and handouts were helpful.				1	2	3	4	⑤
The learning event achieved the defined learning outcomes.				1	2	3	4	⑤
I liked how the facilitators presented and delivered the content.				1	2	3	4	⑤
The facilitators seemed knowledgeable about the subject matter.				1	2	3	4	⑤
The facilitators conveyed a positive and respectful attitude toward the participants.				1	2	3	4	⑤
I had the opportunity to provide feedback on how to apply my new skills on the job.				1	2	3	4	⑤
I was given clear direction on how to implement my action items				1	2	3	4	⑤
I was provided with guidance and support to access Business U's eUniversity.				1	2	3	4	⑤
The learning event met my learning style.				1	2	3	4	⑤
The learning environment and facilities were appropriate for this event.				1	2	3	4	⑤
I would recommend this learning event to my colleagues.				1	2	3	4	⑤

Briefly describe how Business U can improve this learning event?

N/a

What do you feel was the most effective part of this learning event? What excited you most?

The marketing / web applications modules.

What did you not find useful in this learning event?

The information that was provided can be utilized immediately.

Comments:

Business Engagement Boot Camp
Onsite Boot Camp Learning Event: Central Coast Cohort 3
May 20, 2015

Please give your anonymous assessment of the onsite Business Engagement Boot Camp *learning event. Your thoughtful and objective responses to each question are a highly valued part of Business U's facilitation and learning continuous improvement process. Thank you.*

Using the scale below where (1) = **Strongly Disagree** and (5) = **Strongly Agree**
Circle your level of agreement with the following statements:

Strongly Disagree	Disagree somewhat	Neutral	Agree somewhat	Strongly Agree				
(1)	(2)	(3)	(4)	(5)				
The learning event met my expectations.				1	2	3	4	⑤
The subject matter was well organized.				1	2	3	4	⑤
The materials and handouts were helpful.				1	2	3	4	⑤
The learning event achieved the defined learning outcomes.				1	2	3	④	5
I liked how the facilitators presented and delivered the content.				1	2	3	④	5
The facilitators seemed knowledgeable about the subject matter.				1	2	3	4	⑤
The facilitators conveyed a positive and respectful attitude toward the participants.				1	2	3	4	⑤
I had the opportunity to provide feedback on how to apply my new skills on the job.				1	2	3	④	5
I was given clear direction on how to implement my action items				1	2	③	4	5
I was provided with guidance and support to access Business U's eUniversity.				1	②	3	4	5
The learning event met my learning style.				1	2	3	④	5
The learning environment and facilities were appropriate for this event.				1	2	③	4	5
I would recommend this learning event to my colleagues.				1	2	3	④	5

Briefly describe how Business U can improve this learning event?

_____

_____

What do you feel was the most effective part of this learning event? What excited you most?

_____

_____

What did you not find useful in this learning event?

_____

_____

Comments:

Learning Event Evaluation Summary for
May 20, 2015, Business Engagement Boot Camp

The learning event met my expectations.	4.57
The subject matter was well organized.	4.71
The materials and handouts were helpful.	4.50
The learning event achieved the defined learning outcomes.	4.50
I like how the facilitators presented and delivered the content.	4.79
The facilitators seemed knowledgeable about the subject matter.	5.00
The facilitators conveyed a positive and respectful attitude toward the participants.	4.86
I had the opportunity to provide feedback on how to apply my new skills on the job.	4.21
I was given clear direction on how to implement my action items.	4.14
I was provided with guidance and support to access Business U's eUniversity.	4.29
The learning event met my learning style.	4.29
The learning environment and facilities were appropriate for the event.	4.57
I would recommend this learning event to my colleagues.	4.71

Weighted average Likert scale 1 to 5, n=14

Analysis of Learning Event Evaluation Summary & Process for Post-Learning Event Review

While it is hard to find fault in scores such as these, an examination of the four statements that yielded scores less than 4.5 provides insight as to aspects of the learning event that may be improved with relatively little increased investment. Three of the four items entail future action on the part of the learner. It is possible that general discomfort with uncertainty may account for the lower scores on these three items. However, it likely would be straightforward to bridge the gap between what the learners feel they know about how to apply newly attained knowledge in future work situations and how well-equipped they are at the end of the learning event. Providing "10-Step" cards to learners at the end of the learning event with explicit instructions for providing feedback on how to apply new skills on the job, how to implement action items, and how to access key sections of the Business U website would be an excellent addition to the learning event.

The fourth item that received less than 4.5 weighted average score concerns learning style. It is striking that learners who rated this item less than 4 offered no comments related to learning style. Perhaps more explicit description of the different instructional methods used throughout the course to make the material accessible to a broad range of learning styles would help learners think critically about how they learn best and how to appreciate the ways others learn, as well.

This feedback will be discussed in a meeting of the Chief Education Officer, the Education Director, and other Business U staff in preparation for future delivery of the learning event. The survey results will also be used in conjunction with the survey results from other instances of the learning event to determine what fine-tuning is most beneficial for learner satisfaction immediately after and three months after the learning event. In addition, Business U recently decided to begin administering a version of the Pre-Learning Event Questionnaire for the managers of groups taking Business U learning events to ascertain their satisfaction pre- and post-learning event.

BU

Continuous Improvement Process Action Plan

Purpose

This document is used as a tool to contribute to the ongoing evaluation and improvement of Business U's operations, learning events, and professional development according to the organization's Continuous Improvement Policy.

Evaluator _____

Date _____

Goal _____

_____

Strategies (What? & How?)	Data Collection Sources	Responsibility (Who?)	Timeline (When?)	Resources (What/How Much?)	Improvement Indicators

Reference
ANSI/IACET 1-2013 Standard Category 10

/Policy_on_Attendance_and_Assessment

WORKFORCE DEVELOPMENT

EDUCATION

ECONOMIC DEVELOPMENT

COMPREHENSIVE INDEX

Legend: [Topic Name] [(Category.Element)], [Page Number] [Type]
Types: **E**xample, polic**Y**, proces**S**, **T**ool

INDEXES

Examples

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BU

Processes

Tools

GLOSSARY OF KEY TERMS

ASSESSMENTS

Assessments are the instruments used to determine whether learners have achieved the desired learning outcome. These instruments can be in the form of: written pre-/post-tests; demonstrations of skill; activities; verbal feedback or discussions; class participation; presentations; oral interviews; and/ or any other method by which the learner can demonstrate that they meet the learning outcome.

CONTACT TIME

Contact time is the duration of a learner/learning-source interaction. So, a "contact hour" is one clock hour of interaction between a learner and an instructor, or between a learner and learning materials. For purposes of the CEU, the connection is two-way — that is, the instructor or learning source monitors the learner's progress and/or provides some form of feedback to the learner.

CE/T

CE/T are structured educational and training experiences (learning events) for personal and/ or professional development in which learners are assumed to have previously attained a basic level of education, training or experience.

CEU

Continuing Education & Training Units are awarded by many education and training providers to signify successful completion of non-credit programs and courses intended to improve the knowledge and skills of working adults. Business U awards IACET CEUs as records of refresher, transitional, or knowledge improvement accomplishments by professional workers.

EVIDENCE

Evidence comes in the form of documentation affirming that the Provider is adhering to the ANSI/ IACET 1-2013 Standard. Evidence includes, but is not limited to, electronic database records, written charts, handwritten notes, training transcripts, and hard copies of the certificates presented following the event.

FEEDBACK

Feedback is the information (in-person or electronic) that is provided to an individual during and/or after a learning event. Feedback includes but is not limited to oral and/or written communication.

LEARNERS

Learners are the participants of the continuing education & training programs for which CEUs are awarded. Business U's learners are employed by organizations that operate in the workforce development, education, and economic development sectors.

LEARNING

Learning is the process by which one increases one's knowledge, skills, habits or tendencies through experience, practice or exercise.

LEARNING EVENT

A learning event is a group of experiences or activities designed to enhance learners' understanding of content or their ability to perform skills that satisfy a set of learning outcomes. Learning events can be delivered via media such as classroom instruction, distance learning instruction, blended learning instruction, conferences, and satellite transmissions.

LEARNING OUTCOME

A learning outcome is a statement connected to a learning event that indicates what a learner is expected to know or do by the end of a learning event. Learning outcomes are defined in terms of knowledge, skills, and abilities.

MASTERY

Mastery indicates proficiency, knowledge, and/ or the ability to achieve learning outcomes.

NEEDS ANALYSIS

A needs analysis is a method used to determine the requirements, needs, and/or expectations of learners prior to a learning event. Needs analysis methods may include: focus groups; questionnaires; surveys; participants' comments and suggestions; records; reports; tests; self-assessments; print media; observations; work samples; industry requirements; and customer requests.

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PILOT STUDY

A pilot study is a preliminary feasibility test of for a newly developed learning event with a sample of "typical" learners. The pilot provides a chance to resolve content, timing, and/or technology issues. Pilot studies for online learning events help the Provider determine the average time it takes learners to finish, which is used to award CEUs.

PLANNING

Planning is the development process for a learning event.

POLICY

A policy is a written statement of defined expectations that guide, influence, and determine decisions or actions. Policies define scope, roles, and/or responsibilities within a learning program.

PROCESS

A process is a series of written, step-by-step actions one takes to accomplish a procedure.

PROFESSIONAL DEVELOPMENT

Professional development involves the skills, knowledge, or abilities attained to develop or further one's professionalism, career advancement or personal growth.

PROVIDER

A Provider is an individual, unit, or organization that conducts continuing education & training. An IACET Accredited Provider is an organization that has met the requirements to award IACET CEUs to learners who successfully complete the learning event.

SUPPORT SERVICES

Support services are the services available to help learners succeed. Examples of such services include: help desk functions; weekly study skill workshops; study groups and homework help sessions for selected learning events; academic coaching; accommodation support for students with disabilities; and study skills consultation.

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BusinessU

Maximizing Business Engagement