

Statement of Capabilities

2013



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Corporate Profile

Corporate University Enterprise, Inc. (CUE) is an educational consulting firm designed to integrate strategic approaches to workforce development in both private and public organizations. CUE focuses on the business aspects of developing, launching, managing, and refining a learning enterprise that strategically impacts both the knowledge worker and the organization's competitive advantage.

Founded in 1998, CUE is a privately-held small business that provides global workforce education services. CUE is led by Karen Barley, current President and co-founder of CUE, along with Vice President Teresa Sayasithsena. Under their leadership and with expert contributions from a cadre of managers, associates, and consultants, the company has achieved recognition in *T+D Magazine*, *The New Corporate University Review*, *Employee Benefits News*, and *Recruit*; engaged in international collaborations; and earned awards for its organizational development and strategic learning designs.

CUE's approach remains conceptual, strategic, and 100% operational. CUE provides a suite of turnkey learning services – everything from learning strategy development and deployment, instructional design and curriculum development, training operations, and evaluation. CUE does this by rolling up its sleeves and working directly with its clients. This Statement of Capabilities describes the people and services that comprise CUE and its commitment to developing and facilitating strategic approaches to workplace learning.

CUE's Differentiators

Over 15 years ago, the corporate university community had access to only a handful of design firms and individuals with specialization in the strategic development of corporate university initiatives. At the time, CUE's founders were running two different corporate universities in the Washington, DC area. The founders saw a unique opportunity to capitalize on their practitioner-based experience in an emerging field of practice that was hungry for support, expertise, and leadership.

CUE emerged quickly as a forerunner not only for its critical timing and foresight in an emerging industry but also for its careful, organic approach to growth. CUE quickly solidified its expertise in the strategic learning world. As the services CUE offers have expanded, the fundamental roots to its business have remained:

1. **Partnership:** At CUE, it strives to make each client experience a mutual transfer of knowledge and expertise. CUE's goal is to empower its clients to nurture their own training needs over time, not to make them dependent on an external resource.
2. **Customer Satisfaction:** A basic rule at CUE is to always put existing client needs first. As a small business, CUE is constantly seeking its next client engagement; however, CUE is careful to ensure that existing customers get special, dedicated support. CUE never sacrifices existing customers for the potential of new ones.
3. **Shared Success:** Corporate universities are one area that may receive awards on an annual basis. In fact, many of CUE's clients have won awards for their corporate

universities that CUE helped to create. Due to client relationship practices, CUE is delighted to be included in their clients' awards celebrations and acknowledgement. And, CUE makes sure to share the best stories about its clients (with their permission, of course) in opportunities at conferences, industry events, articles, and books. Your success is CUE's success.

4. **Lifelong Learning:** At CUE, it has recruited some of the best thought leadership in the training and strategic learning worlds. CUE fully recognizes that its business is about its knowledge. In short, CUE practices what it preaches. Specifically, CUE's internal corporate university is based on its core and job-specific competencies, is tied inherently to its corporate goals, and demonstrates its value to the business. CUE is in constant re-invention mode and does not believe in resting on its laurels.
5. **Moral Character:** Integrity is important at CUE. CUE has a strong series of ethics that ensure it honors their contracts and non-disclosure agreements. CUE clients allow CUE to access some of the most confidential and sensitive information about their organizations. CUE takes that level of trust quite seriously. Your secrets are safe with CUE.

These tenets have been constant since CUE's inception and have empowered its organization to grow at a reasonable, manageable pace. CUE has been in the unique position to both build its organization and contribute to the growth of an emerging industry. CUE believes that it has a responsibility to contribute and give back to that industry. CUE teams of thought leaders and consultants volunteer to serve on training advisory boards, contribute to the growing literature base, and serve on international industry award committees.

Perhaps most important, however, to CUE's uniqueness is its approach to building corporate universities that relies on business plan principles and a tried and true set of components. Focusing on the Strategic Foundation, Curriculum and Services, Operations and Logistics, and Metrics and Evaluation, the components that form a successful corporate university are the core of CUE's approach to helping its clients develop lasting learning and development functions for their organizations (Figure 1):



Figure 1

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CUE's differentiators are embedded in its founding principles and customer engagement process, organic and reasonable approach to growth, thought leadership, and unique approach. You will find CUE's approach to be smart, nimble, customized, and nearly free of red-tape; CUE's current customers like it that way.

CUE's Services

Every business has its own unique culture, politics, language, and style which influence the design and focus of associated learning programs and strategic learning communities. In other words, no two organizations are alike, and no two corporate universities are alike.

The outcomes that CUE's service options produce are equally distinct. While the methodologies and approaches are consistent across projects and clients, the shape of each corporate university is truly unique. CUE is committed to helping you find a level of service that aligns with your needs and interests, not to selling a one-size-fits all solution. CUE provides services along all stages of the corporate university continuum (Figure 2):

For those just getting started, Business Case and Mental Model, Business Plan, and Launch Plan services apply. For organizations that have already launched, on-going Implementation and Re-engineering services are more suited. Each service also comes with options for light—coaching and critiquing—or heavy, end-to-end consulting support.

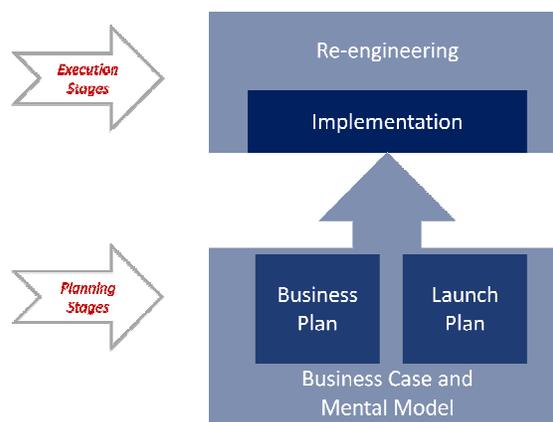


Figure 2

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These five service areas serve as the foundation for a full series of discrete service offerings to support the development of each major service area.

Business Case and Mental Model	
Service	Description
SWOT Analysis and Current State	CUE identifies the Strengths, Weaknesses, Opportunities, and Threats facing your current learning and development. CUE analyzes this data to establish the rationale for defining a different approach to learning and development within your organization.
Mental Model for the Corporate University	CUE develops a strategic, cohesive conceptual framework for the future state of learning and development. This framework builds understanding and support for the future state and addresses the strategic foundational components to include: the vision, mission, goals, objectives, structure, curriculum focus, and expected outcomes.
Business Plan	
Service	Description
Business Plan	CUE builds the Business Plan based on the Business Case and Mental Model's strategic foundation to define the strategies, structure, services, products, infrastructure, and reporting necessary to bring the conceptualized future state to life. It is a full-scale blueprint for the new approach to learning and development.
Business Plan Critique	CUE reviews and analyzes your internally-developed Business Plan with confirmation on solid designs and suggestions for improvement.

Launch Plan	
Service	Description
Launch Plan	CUE dedicates an experienced corporate university team to work side-by-side with your learning leader to define the strategies and actions necessary to implement the Business Plan. The Launch Plan includes phases of development, key milestones, the launch event, project planning, change management, and initial funding to prepare the organization to launch the first phase of the future state of learning and development.
Launch Plan Critique	CUE reviews and analyzes your internally-developed Launch Plan with confirmation on solid designs and suggestions for improvement.
Implementation	
Service	Description
Workstream Management	CUE provides project planning and management and contributions to the development of solutions associated with workstreams that are part of the first launch phase of the new learning and development approach. These workstreams include, but are not limited to: engagement and development of subject matter experts; evaluation planning and implementation; development of instructional design capabilities; LMS selection, installation, and configuration; existing content sorting, cataloging, and consolidation; and governing group engagement.
Instructional Design	CUE designs and develops signature learning and development solutions to be implemented during the first phase of the new approach to learning and development. CUE's approach to instructional design is based on the classic ADDIE model and incorporating a project management element. This helps to ensure on-time and accurate delivery of training materials for all delivery methods ranging from traditional classroom delivery to e-Learning, as well as blended learning design.
Standard Operating Procedures	CUE provides support in developing process maps, work instructions, and RACI allocations for all procedures related to the smooth operation of the future state of learning and development.
Re-engineering	
Service	Description
Awards	CUE prepares applications for learning and development industry awards for your existing corporate university. These application industry awards include: Training Magazine's Top 125, CLO Magazine's LearningElite, Bersin & Associates, and ASTD BEST.
Strategic Plan	CUE provides development of on-going strategic plans for continuously growing and sophisticating your corporate university.

For a detailed breakdown of these services, please see the Appendix section.

Client Experience

Since its incorporation, CUE has worked with large, mid-size, and small organizations in both government and commercial sectors to develop and manage strategic learning initiatives. CUE has worked domestically and internationally for organizations with widely dispersed audiences, mixtures in learner needs, and variety in competitive goals:

Government

- ❖ Centers for Disease Control and Prevention
- ❖ Central Intelligence Agency
- ❖ Chesterfield County Government
- ❖ City of Tucson
- ❖ Colorado Department of Transportation
- ❖ Defense Intelligence Agency
- ❖ European Aeronautic Defense System
- ❖ Federal Emergency Management Administration
- ❖ Federal Deposit Insurance Corporation
- ❖ General Services Administration
- ❖ Industrial Technology Research Institute of Taiwan
- ❖ National Advanced Fire and Resource Institute
- ❖ National Institute of Standards and Technology (Manufacturing Extension Partnership University)
- ❖ National Institutes of Health
- ❖ National Wildfire Coordinating Group
- ❖ Pension Benefit Guarantee Corporation
- ❖ Royal Air Force
- ❖ U.S. Bureau of the Census
- ❖ U.S. Department of the Army
- ❖ U.S. Department of Defense
- ❖ U.S. Department of Health and Human Services
- ❖ U.S. Naval Supply Systems Command
- ❖ U.S. Patent and Trademark Office
- ❖ Virginia Housing Development Authority

Commercial

- ❖ ADP
- ❖ Alion Science and Technology
- ❖ American Association of Motor Vehicle Administrators
- ❖ American President's Lines, Ltd.
- ❖ American Red Cross
- ❖ Ameriprise Financial
- ❖ AMEX Canada
- ❖ AmRest
- ❖ Anteon
- ❖ Apple Computer, Inc.
- ❖ Applied Industrial Technology
- ❖ Arden Realty
- ❖ ARIN
- ❖ Balley Total Fitness
- ❖ Battelle
- ❖ Bayer Inc.
- ❖ BC Ferries
- ❖ BCW Consulting
- ❖ BF Goodrich Tire Manufacturing
- ❖ Blue Shield of California
- ❖ Booz Allen Hamilton
- ❖ Brown-Forman
- ❖ Cameron
- ❖ Cancer Treatment Centers of America
- ❖ Carillion Health Systems
- ❖ Carter Bloodcare
- ❖ Capital One
- ❖ Case Design
- ❖ Caterpillar
- ❖ Christiana Care Health System
- ❖ CIBC
- ❖ Coast Capital Savings
- ❖ CoBank
- ❖ Commerce Bank
- ❖ Country Insurance and Financial
- ❖ Dean Health Systems, Inc.
- ❖ Denny's, Inc.
- ❖ E*Trade Financial
- ❖ Elder Health
- ❖ Enogex
- ❖ Equity Residential
- ❖ The Erickson Foundation
- ❖ ESI International
- ❖ Fannie Mae
- ❖ FedEx Ground
- ❖ FMC Technologies
- ❖ France Telecom
- ❖ Genentech, Inc.
- ❖ Genesys Health Systems
- ❖ Georgia Pacific
- ❖ HMS
- ❖ ICF
- ❖ Ingersoll-Rand
- ❖ INVISTA
- ❖ JetBlue
- ❖ KPMG – USA
- ❖ KPMG – Canada
- ❖ KPMG – Global
- ❖ LandAmerica
- ❖ Lansing Community College
- ❖ The Learning Group
- ❖ Lockheed Martin
- ❖ Marriott
- ❖ MetLife
- ❖ Michelin North America
- ❖ MGM MIRAGE
- ❖ MGM Grand
- ❖ Mohegan Sun
- ❖ Motley Fool
- ❖ Mountaire Farms, Inc.
- ❖ MTN Group Management Services (Pty) Ltd.
- ❖ National Electrical Benefit Fund
- ❖ The Nemours Foundation
- ❖ Nielson Media
- ❖ North Shore Credit Union
- ❖ OGE Energy Corporation
- ❖ Pearson
- ❖ PepsiCo
- ❖ Philip Morris USA
- ❖ Phillips Edison Company
- ❖ Plastipak Packaging, Inc.
- ❖ Porsche Cars North America
- ❖ Quest International
- ❖ QVC
- ❖ Rackspace Managed Hosting
- ❖ Reebok
- ❖ ReedSmith, LLP
- ❖ Regence
- ❖ Research In Motion Limited
- ❖ Reserve Bank of South Africa
- ❖ The Ritz-Carlton Hotel Company, LLC
- ❖ Rogen
- ❖ Saatchi & Saatchi
- ❖ Satyam Computer Services, Ltd.
- ❖ Sauer-Danfloss
- ❖ Shop At Home, LLC
- ❖ Sikorsky Aircraft Corporation
- ❖ Simonton Windows
- ❖ Sodexo
- ❖ Spectra Logic Corporation
- ❖ State Farm Insurance
- ❖ St. Michaels Hospital
- ❖ TD Bank
- ❖ TEKSystems
- ❖ Thomson Prometric
- ❖ Thomson Reuters

- ❖ Toyota
- ❖ Trane
- ❖ TriWest Healthcare Alliance

- ❖ TTC Innovations
- ❖ Turner Broadcasting System
- ❖ UGI Utilities

- ❖ UPS
- ❖ WDHB Consulting Group
- ❖ West Chester University

Publishing and Speaking Engagements

In its role as an industry leader, CUE consistently stays a head of its competitors through the research of best practices, benchmarks, and trends in the corporate university field. CUE is proud to offer several books authored by CUE employees and advisors. CUE also offers other publications in the form of research studies, white papers, articles, and best practice compilations to support customers interested in information to help them reinvent their corporate universities to maintain continuous innovation and competitive advantage. Descriptions of current publications are available via CUE's website at www.cuenterprise.com.

CUE's consultants and experts regularly speak and conduct workshops at major industry events such as ASTD's International Conference and Expo, Chief Learning Officer's Symposium, and IQPC's Corporate University Week.

Key Personnel

All CUE personnel are skilled in the concepts of strategic learning development and management and can apply the components of CUE's business model to the unique needs and cultures of its client organizations. Below is a sample list of the talent that comprises CUE:

Karen Barley, President and Senior Consultant

Karen Barley is the President and a co-founder of CUE. Karen has taken CUE from start-up consulting company to a powerhouse in the strategic workplace learning industry since 1998. At CUE, Karen is responsible for the company's strategic direction and serving clients with developing and innovating corporate universities. Over the course of 15 years, Karen has worked with over 200 corporate universities, spanning three continents. Innovation and partnership are strong themes in Ms. Barley's approach. With a keen sense and appreciation for how the power of learning functions differently in every organization, Karen's client work is always unique. Karen's sessions are filled to capacity at events such as Corporate University Week and ASTD's International Conference and Expo. She also serves on several judging panels for industry awards, including IQPC's Corporate University Best in Class (CUBIC). Karen's work with various learning programs has been published and highlighted in the *New Corporate University Review*, *Employee Benefit News*, *T&D*, and *Recruit*, and she is a contributing author to *The Corporate University Handbook: Designing, Managing, and Growing a Successful Program*. Karen earned her Bachelor's Degree from Dickinson College and a Master's Degree in Adult and Continuing Education from Virginia Tech. Her graduate studies included an independent research project and thesis on conceptualizing the corporate university.

Teresa Sayasithsena, Vice President

Teresa Sayasithsena is Vice President of CUE and an original member of the CUE team. She works closely with the President and is responsible for delivery of the on-going strategic planning and management of the business and oversight of the operational infrastructure. Teresa specializes in project planning and management, cost control, risk mitigation, and effective resource allocation. Among Teresa's significant accomplishments at CUE have been the streamlining of internal operational processes to include instituting a new automated credit card payment system and designing an automated tracking database for internal and external projects. During her original contributions to CUE, she independently managed the PTO University Extension Office, overseeing the training and educational programs offered through George Washington University, Marymount University, and Northern Virginia Community College. Teresa also administered the PTO Patent Academy's Juris Masters Program through George Washington University Law School. Teresa left CUE for 8 years and served Arlington County community as a Deputy Sheriff. Teresa was vital in developing case management for over 500 prisoners and independently managed over 200 inmate record files. She was also instrumental in identifying improper coding that led to recovery of over \$50,000.00 in lost revenue. Her attention to detail brings necessary quality assurance to CUE's client work. Teresa holds a Bachelor of Science degree in Criminal Justice from Shippensburg University.

Carolyn Barley, Consultant

Carolyn Barley is a consultant at CUE with first-hand experience in all aspects of corporate university design, development, and implementation. For dozens of clients around the globe, Carolyn has architected corporate university blueprints, conducted content reviews, and completed instructional design projects. Her client list includes Capital One, KPMG, UPS, the National Wildland Fire Coordinating Group, RIM, CoBank, and Sikorsky. To facilitate the design of corporate university blueprints, Carolyn focuses on curriculum and operational components. She has mapped the operational processes and procedures to standardize how global learning should occur across an enterprise. She also aided in the re-design and co-facilitates CUE's "How to Launch and Manage a Corporate University" workshop. For content reviews, Carolyn has been responsible for organizing and reviewing existing courseware. For a recent client, Carolyn designed and facilitated the review of more than 3,000 existing courses. The review included competency alignment, analysis of duplicative or inconsistent content, and determination of complexity to support leveling and learning path development. The review resulted in a clean catalog of approximately 1,600 learning solutions leveled, mapped, and targeted for particular audiences at the launch of the company's new LMS. As an instructional designer, Carolyn has created both instructor-led and e-Learning solutions on technical and soft-skills content. She engages the ADDIE instructional design model and infuses creativity in her designs to meet specific learning needs and target audience profiles. Prior to joining CUE, Carolyn was

the Membership Coordinator for Phi Sigma Sigma International Sorority's Headquarters located in Elkridge, MD. Carolyn was one of a small core team responsible for executing a pilot series of 10 Regional Leadership Conferences. In addition, she was instrumental in the development and implementation of a virtual-based database. Carolyn earned her Bachelor of Science degree from Lebanon Valley College, Annville, PA, in Business Administration with focuses in Management and Marketing. She is a certified Instructional Designer through Langevin Learning Services. Additionally, she is partially fluent in Spanish and is the resident CUE expert on authoring tools and creative technologies.

Joseph Zarobila, Associate

Joseph is an experienced client support Associate at CUE. He works closely with the Vice President overseeing day-to-day office operations and ensuring quality of client deliverables. Joe is responsible for vendor management, standard operating procedures, meeting and event planning, client deliverable production, customer service and communications, and special research projects. His proficiency in a variety of computer programs and databases allows him to provide excellent graphic design and easily acclimate to new technology. Although relatively new to the learning and development community, Joe brings with him years of project and event management experience. While serving on various local government special events committees, he has prepared for and worked on multiple local youth sporting events. Joe was responsible for making sure each site was covered by a county representative and created solutions to any problems that arose during the course of the tournaments. He also served as an ambassador of the local town and county governments to each of the visiting teams and their families. Joe's consistent hard work and dedication led him to be named tournament director for the 2009 23 and Under National Championship held in Sterling, Virginia. Joe earned a Bachelor's Degree in Kinesiology from James Madison University, where he majored in Sport and Recreation Management and a minor in General Business.

Marcella Simon, Instructional Designer

Marcella Simon is a world-class Instructional Designer with CUE. She has over 20 years experience in adult learning strategies and human capital development including teaching and training, curriculum and instructional design, and project management. She engages industry tested models, performs needs assessment activities, facilitates engagement of subject matter experts, and ensures alignment to organizational curriculum. Her recent clients include Business-Community Synergies, U.S. Department of State, ESI International, Murdoch University, SCENDIS LLC, and Windwalker Corporation. Marcella has managed large and small scale training programs including both distance and face-to-face modalities, revisions of KSAs and competencies, and evaluation up to Kirkpatrick Level 3. She is an expert in the design and development of distance and blended learning projects that include e-Learning, mobile learning, pod/vodcasting, webinars, and social networking modalities. She manages

vendor teams in the design, development, implementation, and evaluation of classroom training. She actively engages and manages subject matter experts and instructional designers throughout the instructional design process to ensure that the end learning solution matches the vision. She is comfortable with classroom, blended, and e-Learning solutions and has designed and analyzed numerous assessments and evaluations. She has conceived, designed, developed, and implemented entire learning programs and events, including engaging and supervising contractors and vendors. She has written scripts, directed, and presented video clips, pod and vod-casts, and webinars. Marcella has worked as an employee and contractor in the private, public, and academic sectors including the U.S. Department of State, U.S. Census Bureau, George Washington and American Universities, and designed projects for firms such as Bank of America and APCO Worldwide. Marcella earned her Masters of Education in Instructional Design from George Mason University, Fairfax, VA and her Master of International Management from the American Graduate School of International Management (Thunderbird) in Glendale, AZ. She has also conducted doctoral research in Australia. From Antioch College, Glendale, OH, she earned her Bachelor of Arts in Psychology. She was on the Member Board for the American Society for Training and Development (ASTD) in the Washington, DC Metro Chapter. She is affiliated with the E-Learning Guild and the Society for Intercultural Education, Training, and Research (SIETAR).

Michael Rothschild, Instructional Designer

Michael Rothschild is a Senior Instructional Designer with CUE. He has provided innovative, high-quality training solutions to corporate, non-profit, government and education clients for over 30 years. He combines a strong background in education, training, and organizational development with 25 years of experience working with advanced technology. His recent clients include Genesys Health Systems, US State Department, Division of Antiterrorism Assistance, FEMA, Community Emergency Response Teams, Nova Southeastern University, Marriott Hotels, Sikorsky Aircraft, and Center for Economic Development and Population Assistance. Michael integrates a results-oriented approach with strong interpersonal, communication, and technical skills. He has strong leadership skills and is an effective team member who believes work should be challenging, creative, rewarding, and fun! Michael establishes strong client relationships, and is frequently retained by clients for multiple projects. He consistently develops interactive training that communicates complex, technical information clearly and concisely. He is highly skilled in all phases of the instructional design process and has produced a wide variety of successful Web-based, instructor-led, and blended courses. He brings an organizational development focus to each product. He encourages the analysis and evaluation of business processes and constantly seeks new approaches, procedures, and tools that will improve quality and efficiency. Michael earned his Masters of Education in Organizational and Human Resource Development from the University of Vermont.

Raphael Seligmann, Instructional Designer

Raphael Seligmann is an instructional designer and instructor with 30 years experience. His recent client list includes Fortune 500 companies such as Capital One and Travelers, up-and-comers such as Code-X, and nonprofits such as Equality Virginia. Raphael has led high-profile, high-impact instructional design projects. For one recent client, he reorganized analyst training, bringing over 1,000 course offerings in line with the company's competency model and development priorities. In the process, he identified gaps and filled them with new training in areas such as business etiquette and cross-cultural communication. For another client, he designed a computer-based onboarding program, which received an Editors' Pick award from *Training Magazine* and an internal award for excellence. As a classroom instructor, Raphael has taught business people, soldiers, and full-time students in topics ranging from banking compliance to classical rhetoric. He is as comfortable in large-scale lecture or town hall formats as he is in one-to-one mentoring. A veteran teacher of English as a Second Language, he often coaches foreign-born executives. In the nonprofit realm, he has mentored disadvantaged schoolchildren for a dozen years and runs an award-winning mentoring program. He has a reputation for quickly grasping the processes, language, and aspirations of clients in diverse industries and using that knowledge to craft strategies finely attuned to each client's unique needs. In several cases, he has become so conversant with his clients' businesses that they entrust him to write up their programs for international awards and publication in peer-reviewed journals. Raphael holds a PhD in English Literature from Brandeis University, a master's degree from Johns Hopkins, and a bachelor's degree from Cornell. An independent Shakespeare scholar, he has numerous publication credits, including an essay to be published by Oxford University Press in 2012. Before becoming a consultant in 2003, he was a communications manager at Media General and Anthem. He has also held editorial positions with the U.S. Military Academy and Cornell University Press, plus numerous faculty positions.

Chuck Daly, Instructional Designer

Chuck Daly has over 15 years experience in curriculum development, education, and facilitation. He is an instructional designer and logistics associate for CUE. He specializes in making learning relevant and interesting through the use of creative delivery techniques, innovative exercises, and unique classroom activities. Certified in CUE's ADDIE+M model, Chuck has contributed to instructional design projects for clients such as BC Ferries and Philip Morris. He has worked for both public education institutions and non-profit foundations. His experience involves preparing other facilitators, including several programs in professional teacher development. A skilled facilitator and teacher himself, Chuck has conducted numerous workshops on effective classroom management and creative and innovative instructional design. Chuck's instructional design capabilities have been instrumental in building CUE's own corporate university. His work included a multi-faceted boot camp for corporate university consultants as well as an immersion program in CUE's instructional design methodology.

Chuck is also the designer behind CUE's "Launching and Managing a Corporate University" workshop that is conducted at several international conferences each year. Chuck earned his Master of Arts in American History at George Mason University and his Bachelor's Degree in Education from the University of Scranton. Chuck also has various teaching licenses in Maryland and Virginia.

Contracting Eligibilities

CUE is listed as a Trading Partner in the Department of Defense (DoD) System for Award Management (SAM). CUE is certified as a prime vendor for Education and Consulting services in SAM.

CUE is certified as a Small Business by the U.S. Small Business Administration.

Appendix

Business Case and Mental Model

The Business Case and Mental Model are building blocks to a successful corporate university design. Part of the Planning Stage, these two elements articulate the reasons for changing the approach to learning and development and depict an early, conceptual model for what the future state of learning and development should be.

The Business Case focuses on the current state of learning and development to identify positive and challenging characteristics and rationalize the business reasons for exploring a different approach.

The Mental Model capitalizes on the findings from the current state analysis to form one, cohesive, conceptual framework for the future state of learning and development. The Mental Model does not define every detail; it establishes a shared framework or strawman to build understanding and support for the same envisioned future state. Components of a strong Mental Model address the strategic foundation of the corporate university, including:

- The vision and mission for the corporate university
- Descriptions of how the corporate university is aligned to key strategies in the business
- Details around how the corporate university will be governed
- The goals and objectives of the corporate university
- How the corporate university will be structured and where it will reside in the organizational hierarchy
- A high-level description of the content and services that the corporate university will offer

CUE offers two services to support the developed of the Business Case and Mental Model:

Service	Description
SWOT Analysis of Current State	<ul style="list-style-type: none">• Analysis of the Strength, Weakness, Opportunities, and Threats to the current learning and development approach• Includes data collection, data interpretation, and reporting• Establishes the rationale, with key targets, for defining a different approach to learning and development
Mental Model for the Corporate University	<ul style="list-style-type: none">• Development of the strategic, conceptual model for the envisioned corporate university including the vision, mission, goals, objectives, structure, curriculum focus, and expected outcomes

Service	Description
	<ul style="list-style-type: none"><li data-bbox="649 226 1404 298">• Includes a working session with key stakeholders or internal design team

Business Plan

The Business Plan builds on the Business Case and Mental Model to define the strategies, structure, services, products, infrastructure, and reporting necessary to bring the conceptualized future state to life. It is a complete blueprint for the new approach to learning and development.

Like the Business Case and Mental Model, the Business Plan is part of the Planning Stage. It defines the details of the future learning and development approach to ensure that the conceptual idea can be transformed into a practical reality. A good corporate university Business Plan includes the strategic foundation elements defined in the Mental Model and:

- A description of how SMEs will be used to support learning and development
- The delivery techniques and methods that the corporate university will engage
- Overarching plans for how to coordinate cataloging and scheduling of learning and development opportunities
- A plan for how to staff and fund the corporate university
- A description of how to market and brand the corporate university
- Requirements for any additional technologies, facilities, and/or equipment
- Definition of the key partnerships, internal and external, that need to be in place
- The outcomes that the corporate university should produce
- A plan for how to evaluate the corporate university's performance
- A plan for assessing needs

CUE can build your Business Plan with you or critique one that you build on your own:

Service	Description
Business Plan	<ul style="list-style-type: none">• Working sessions and on-going support to define a blueprint—including the strategies, structure, services, products, infrastructure, and reporting—for the corporate university• Options:<ul style="list-style-type: none">○ End to End: Comprehensive development of all components of a customized Business Plan for the envisioned corporate university○ Collaborative: Development of agreed-upon components of a customized Business Plan for the envisioned corporate university○ Horse Whisperer: Coaching and guidance to an internal leader who is creating a customized Business Plan for the envisioned corporate university
Business Plan Critique	<ul style="list-style-type: none">• Review and analysis of an internally-developed Business Plan with confirmation on solid designs and suggestions for improvement

STATEMENT OF CAPABILITIES

Launch Plan

Transforming a tactical training structure to a strategic learning approach is a daunting task, regardless of the size of the organization. Designing a Business Plan is an important piece, but the real work comes in implementing the plan and making the shift from training to strategic learning and development a true reality. It's a change management process that requires not only an understanding of internal culture, politics, and process but also experience in leading major organizational development efforts.

The Launch Plan defines the strategies and actions necessary to get the corporate university started. It typically defines a series of developmental phases and addresses the tasks to prepare for the defined “go live” of the first phase. A good Launch Plan includes:

- Defined phases of development, along with key milestones, that progressively implement the full vision defined in the Business Plan
- Articulation of how and when the corporate university will be launched
- A project plan that defines the work and resources necessary to prepare the organization for the launch
- A change management plan
- A budget for the pre-launch and initial phases

Like the Business Plan, CUE can build your Launch Plan with you or critique one that you build on your own:

Service	Description
Launch Plan	<ul style="list-style-type: none">• Working sessions and on-going support to define approaches—including phases of development, key milestones, the launch event itself, project planning, change management, and initial funding—to prepare the organization to launch the first phase of the envisioned corporate university• Options:<ul style="list-style-type: none">○ End to End: Comprehensive development of all components of a customized Launch Plan for the first phase of the envisioned corporate university○ Collaborative: Development of agreed-upon components of a customized Launch Plan for the first phase of the envisioned corporate university○ Horse Whisperer: Coaching and guidance to an internal leader who is creating a customized Launch Plan for the first phase of the envisioned corporate university
Launch Plan Critique	<ul style="list-style-type: none">• Review and analysis of an internally-developed Launch Plan with confirmation on solid designs and suggestions for improvement

STATEMENT OF CAPABILITIES

Implementation

After launch, a good corporate university progressively implements more content, different programs, and new technologies. It continues to expand until the full vision articulated in the Business Plan is realized, flexing dynamically as the organization continues to grow and change.

For corporate universities that have made it through their initial launch, CUE provides a series of services that address the on-going sophistication of the corporate university. Services range from support on targeted initiatives—such as deepening the influence of the governing groups or selecting a new learning management system—to instructional design to development of standard operating procedures:

Service	Description
Workstream Management	<ul style="list-style-type: none"> • Project planning and management and contributions to the development of solutions associated with workstreams associated with implementing new initiatives associated with the first phase of the corporate university • Workstream examples include, but are not limited to: <ul style="list-style-type: none"> ○ <i>Engagement and development of SMEs</i> ○ <i>Evaluation planning and implementation</i> ○ <i>Development of instructional design capabilities</i> ○ <i>LMS selection, installation, and configuration</i> ○ <i>Existing content sorting, cataloging, and consolidation</i> ○ <i>Governing group engagement</i>
Instructional Design	<ul style="list-style-type: none"> • Design and development of signature learning and development solutions to be implemented during the first phase of the corporate university
Standard Operating Procedures	<ul style="list-style-type: none"> • Development of process maps, work instructions, and RACI allocations for all procedures related to the smooth operation of the corporate university • Involves multiple working sessions with internal teams

Re-engineering

Organizations change and grow, and a good corporate university has to keep pace and stay aligned. Re-engineering applies to existing corporate universities as they define new strategies, different approaches, and dynamic products and services to stay current and even cutting-edge.

Part of sitting on the cutting-edge involves benchmarking your own corporate university with others. Learning and development awards provide insightful platforms to check the strength of your own approaches with industry trends and best practices. Another part of sitting on the cutting-edge is a continued forward-looking focus to deliberately plan for the future, strategically and proactively.

CUE supports corporate universities with awards and on-going strategic planning:

Service	Description
Awards	<ul style="list-style-type: none">• Preparation of applications for learning and development industry awards<ul style="list-style-type: none">○ <i>Training Magazine's</i> Top 125○ <i>CLO Magazine's</i> LearningElite○ Bersin & Associates○ ASTD BEST
Strategic Plan	<ul style="list-style-type: none">• Development of on-going strategic plans for continuously growing and sophisticating the corporate university• Includes facilitation of working sessions with internal stakeholders and design teams