



## AN ABSTRACT OF THE DISSERTATION OF

Gary Ewer for the degree of Doctor of Philosophy in Education presented on November 18, 2015.

Title: Case Study: Description of a Corporate University's Operational Factors.

Abstract approved: \_\_\_\_\_

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Corporate universities (CUs) have been in existence in the United States since the early 1900s. They are increasingly providing educational and developmental opportunities for workers; however, there is little empirical research on these types of organizations. This study examined a specific electrical distributor's CU using a theoretical framework as a guide. Specifically, the purpose of the study was to identify the operational factors of an existing electrical wholesale distributor's corporate university that has been in continual operations for 27 years. With that purpose in mind, the following are the major research questions:

- What is the history of this particular CU?
- What are the operational factors associated with this particular CU?

The study took place in the CU of a regional electrical wholesale distributor based in the Pacific Northwest. A total of 62 participants consisting of (59) company employees and (3) outsourced vendors contributed to interviews and classroom observations during late 2014 and early 2015. The design of the study was a bounded case study, as described by Yin (2009).

The research findings were based on the following data sources: direct observation of the study site, interviews, classroom observations, and review of documents, and artifacts. Because of the potential issue of conflict of interest, an external person undertook the interviews and

observations. The review and analysis of these materials included 266 pages of transcribed and coded interview and observation notes. Data soundness was ensured by following three procedures: (a) triangulation with other participants and other data collection, (b) member checking with participants, and (c) external audit with a peer researcher.

Three themes emerged from the study:

- Factors that were consistent with Abel's conceptual framework for defining CUs. These included the confirmation of Abel's four profiles. The profiles are: (a) the organizational profile describing factors of a CU's mission and strategies, governance and leadership, stage of development, size, and years in existence; (b) the learning delivery profile describing factors of a CU's curriculum offerings, learner population, evaluation and measurement processes; (c) the operational profile describing factors of a CU's financing sources, technology usage and implementation; and (d) finally, the partnership profile describing factors of a CU's relationship with other internal business units, human resources, academia, and outsourcing.
- Factors that were not consistent with Abel's conceptual framework for defining CUs. These included: (a) the sales revenue model; (b) the partnerships with community colleges; (c) the partnership with sales and marketing, and (d) the tuition reimbursement model.
- New factors and profiles that were discovered. These included: (a) new profile of leaders-as-teachers, and five new factors: (i) partnerships with vendors; (ii) partnerships with outside organizations; (iii) use of course prerequisites; (iv) timing of required training, and (v) the integrated systems model.

This study contributed to the limited body of knowledge about corporate university operations by confirming portions of the theoretical framework and by expanding it, with the addition of one new profile and five new operational factors. Furthermore, it identified some practical implications of the work and suggested areas for future research.

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Case Study: Description of a Corporate University's Operational Factors

by

Gary Ewer

A DISSERTATION

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degree of

Doctor of Philosophy

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Doctor of Philosophy dissertation for Gary Ewer presented on November 18, 2015.

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Dean of the Graduate School

I understand that my dissertation will become part of the permanent collection of Oregon State University libraries. My signature below authorizes release of my dissertation to any reader upon request.

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Gary Ewer, Author

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## **Chapter 1: Introduction**

*Corporate universities are responsible for developing people and growing organizational capabilities (Allen, 2007, p. 4).*

Industry as educator is not a new concept. During our nation's earliest history there was no formal education system to develop the emerging workforce. Out of necessity, American industries became employer, guardian, and educator of the workforce (Eurich, 1985; Miller, 1996). Today, competitive pressures and technological advances require that modern corporations increasingly become the chief educators to the workforce (Lipp, 2013; Meister, 1998; Nixon & Helms, 2002).

Business leaders recognize that work and learning has become the same thing (Meister, 1998). To ensure continued growth in workforce development, progressive companies have established corporate universities (CUs). Prince and Stewart (2002) described that the role of a corporate university is to support the organization's learning and knowledge creation process. Corporate universities strategically direct organizational change by facilitating the knowledge management process as well as by controlling the learning agenda (Prince & Beaver, 2002).

### **Purpose and Research Question**

The purpose of this case study was to examine a specific electrical wholesale distributor's corporate university using Abel's conceptual framework for defining and classifying corporate universities as a guide to this study. This framework was developed in 2008 and theorizes that four profiles form the underpinning of many CUs. The profiles are (a) the organizational profile describes factors of a CU's mission and strategies, governance and leadership, stage of development, size, and years in existence, (b) the learning delivery profile describes factors of a CU's curriculum offerings, learner

population, evaluation and measurement processes, (c) the operational profile describes factors of a CU's financing sources, technology usage and implementation, and (d) the partnership profile describes factors of a CU's relationship with other internal business units, human resources, academia, and outsourcing. The study was conducted at the headquarters of a regional electrical wholesale distributor based in the Pacific Northwest. This 1,240 person organization distributes electrical supplies through 123 branch locations, throughout the western United States. As this is a highly successful CU that has been in operation for over 27 years, the results of this case study may assist other CUs in making informed decisions concerning their workplace training efforts.

With this purpose in mind, the study addressed the following research questions:

- What is the history of this particular CU?
- What are the operational factors associated with this particular CU?

### **Key Terms**

Before describing the significance of this study, it is important to define a key term that will be utilized throughout this paper.

*Corporate University (CU).* Within academic literature there is some confusion concerning the term “corporate university.” For this research, it is important to include two descriptions of a CU. Paton, Peters, Storey, and Taylor (2005) described a CU as a strategic learning initiative that is (a) wholly owned by the parent organization, (b) with the primary focus of providing learning opportunities for employees, suppliers, and customers of the parent organization and, (c) utilizing the symbols and language of higher education to promote an atmosphere of learning. Murray (2002) described a CU as supporting organizational learning and development by (a) aligning corporate learning to

strategic business goals, (b) developing learning alliances with external providers, (c) creating a learning environment through technology, (d) implementing innovative marketing and branding of the CU, and (e) measuring the value of the learning investment. Examples of well known organizations with CUs include Boeing, Caterpillar, Deloitte, Disney, Farmers Insurance, Hewlett-Packard, Intel, Jet Blue Airlines, John Deere, McDonalds, Microsoft, Motorola, Shell, Southwest Airlines, Toyota, Vanguard, and Walgreens. A CU is not a proprietary, for-profit, private college or university such as Cappella University, DeVry University, ITT Technical Institute, or the University of Phoenix. In addition, some in academia have used the term “corporate university” to describe a traditional academic institution that has relinquished its academic and ethical principles to gain financial benefits by serving the interests of large corporations (Aronowitz, 2000). This research will not address that particular issue.

The definitions of other terms important to this study appear in Appendix A.

### **Significance**

The case for the significance of examining a specific CU is based on three factors: (a) an examination of an existing CU’s organizational structure may reveal important factors needed for successful CU operations, (b) there is a gap in academic literature concerning the structure and operations of this specific CU, and (c) as a director of a corporate university, I have a personal interest in this research. Information gained from this study can be used as a benchmark for current and future academic studies.

**Examination of an existing CU’s organizational structure.** The particular case being examined is that of Platt University. Platt Electric Supply began operations in Portland, Oregon in 1953. This family-owned business has grown to 123 branch



locations with 1,240 employees in nine western states. In 1988, the company established Platt University to train and develop the workforce to meet strategic operational goals. The mission of Platt University is to: “Develop our People” by helping employees continually improve their knowledge and skills. The University provides over 1,150 business related courses with training delivery consisting of 50% classroom and 50% online. In 2012, the company was sold to Rexel Holdings Group of Paris, France. Rexel is one of the largest publically held electrical distributors globally with over 28,000 employees, and 2,100 locations in 35 countries.

This study was guided by Abel’s (2008) theoretical framework of defining and classifying corporate universities. Abel surveyed 210 corporate universities operating in North America. The findings revealed four key profiles of a corporate university based on factor analysis. These profiles are the: organizational profile, operational profile, learning delivery profile, and partnership profile (See Figure 1). Abel stated that the framework would act as a “checklist” to help evaluate and enhance practitioners’ understandings of different types of CUs and their operations. This study will attempt to add to scholarly knowledge by examining a currently operational electrical distributions CU using Abel’s four profiles and 15 operational factors as a guide for this study.

**Gap in academic literature.** There appears to be inadequate academic documentation concerning the operations of corporate universities in academic journals, research, and dissertations. To date, I have identified over 82 peer reviewed journal articles, 52 books and four dissertations concerning the operations of CUs.

Meister (2000) stated that CUs have very diverse styles of operations, and it has been difficult to understand how they are evolving. Blass (2001) indicated that there are

few peer-reviewed articles concerning the operation of corporate universities. Taylor and Paton (2002) expressed that empirical research on corporate universities continues to be rare. Taylor (2003) said that corporate universities abound, however, empirical analysis is rare, and he suggested additional research. Walton (2005) stated that hard comparative evidence has been difficult to find and the reported case examples have, for the most part, been small in number and are based on convenience samplings. Wang and Sun (2008) suggested that further empirical studies are required to understand the roles and functions of a CU and the ways in which it impacts business functions. In 2009, I had an e-mail correspondence and phone call with J. C. Meister (personal communication, January 23, 2009), the author of *Corporate universities: Lessons in building a world-class workforce* (1998). She stated that many CUs are being re-invented based on the latest tools and it would be helpful to learn what changes have taken place.

**Personal interest and experience.** I have a personal interest in this research. As a Director of a CU since 1990, I have experienced first-hand the challenges of implementing strategic learning initiatives within the workplace. These experiences have helped me develop workforce training programs that equip employees with effective ways to acquire new knowledge, skills, and abilities to meet workplace challenges. I feel that it is important that further research is conducted to identify factors that impact workplace training challenges within a corporate university setting.

## **Summary**

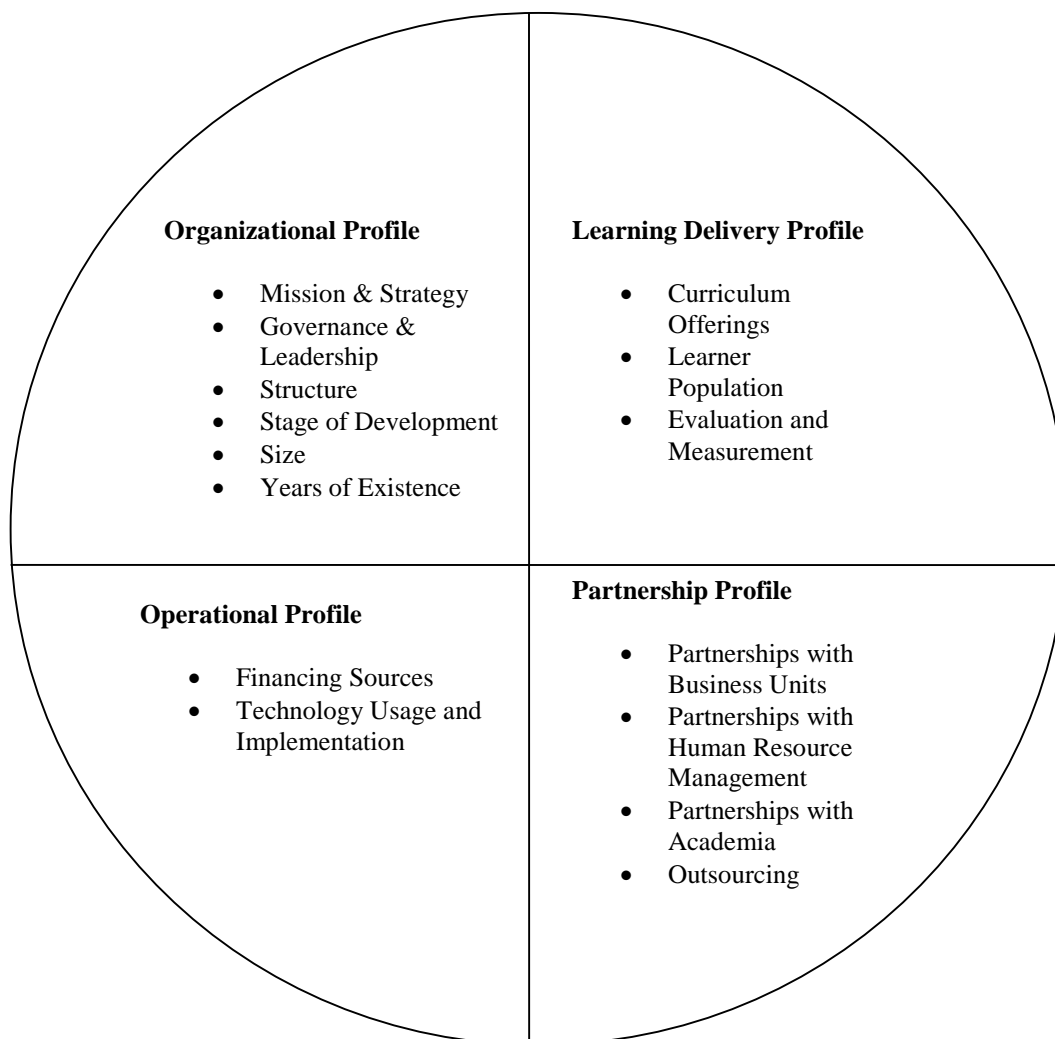
*As long as organizations face new problems and seek new ways of learning, there will be innovations in the structures of corporate universities and the very nature of learning itself (Allen, 2010, p. 53).*

The purpose of this case study was to examine a specific electrical wholesale distributor's corporate university's operational factors using Abel's conceptual framework for defining and classifying corporate universities as a guide to this study. This framework was developed in 2008 and theorizes that four profiles containing 15 operational factors form the underpinning of many CUs. The profiles are (a) the organizational profile describes factors of a CU's structure, strategy, mission, governance, size, and years of operation; (b) the learning delivery profile describes factors of a CU's curriculum, learner population, evaluation and measurement processes; (c) the operational profile describes factors of a CU's technology usage and financial management; and (d) the partnership profile describes factors of a CU's relationship with other internal business units, human resources, external vendors, and academic institutions.

The study was conducted at the headquarters of a regional electrical wholesale distributor based in the Pacific Northwest. This 1,240 person organization distributes electrical supplies through 123 branch locations, throughout the western United States. This successful CU has been in operation for 27 years, and the results of this case study will assist other CUs in making informed decisions concerning their workplace training efforts.

This study addressed the following research questions:

- What is the history of this particular CU?
- What are the operational factors associated with this particular CU?



*Figure 1.* Abel's Conceptual Framework for Defining and Classifying Corporate Universities.

(Used with permission)

## **Chapter 2: Literature Review**

The purpose of this literature review was to gather and evaluate the most current academic research concerning the role of corporate universities (CUs) in the workforce development process. I have specifically reviewed research concerning CU organization, operations, learning delivery, and partnerships. This section begins with the description of the approach to reviewing literature.

### **Approach to Review of Literature**

Creswell (2008) described a literature review as a written summary of journal articles, books, summaries, reviews, and other documents that discuss past and current information: organize the literature into topics, and document a need for conduction the selected study. Boot and Beile (2005) and Torraco (2005) addressed the importance of the development of a critical review. The online resources at the Valley Library at Oregon State University were used to access full text electronic journals. These included the *Advances in Developing Human Resources*, *Community College Review*, *Human Resource Development International*, *Human Resource Development Quarterly*, *Journal of Industrial and Commercial Training*, *Journal of European Industrial Training*, *Journal of Workplace Learning*, *The Internet and Higher Education Journal*, and the Educational Resource Information Center (ERIC). A key word search was used that included a variety of phrases such as: business training, company training programs, corporate university, knowledge management, organizational learning, and workplace development. Over 82 peer reviewed journal articles, 52 books and four dissertations were identified; however, only a limited number of journal articles specifically addressed the particular issue of CU structure, organization, and classification.

Four primary questions were used to direct the literature review:

- What is the development history of CUs?
- How do CUs differ from training departments and traditional universities?
- How do CUs effectively manage workplace development?
- What does the empirical research literature say about CUs?

These questions provided a basis for the investigation of literature as well as a framework to (a) understand the problem, (b) formulate a research design, and (c) provide valid answers to the research questions.

### **What is the Developmental History of CUs?**

*“In the old economy, one’s life was divided into school and then work. Now, more than ever workers are expected to build their knowledge base throughout their life”*  
(Meister, 1998, p. 8).

This section will examine the developmental history of CUs in workforce development. Learning and work have been coupled together since the earliest human history. Estep (2008) described that throughout human history elders have informally trained emerging generations in effective ways of finding food, designing tools, and caring for the young. Estep further described how training became more formalized with the development of apprenticeship and guilds. However, this literature review focuses on the development of workplace training in the United States that began in the late 19<sup>th</sup> century. The expected contribution of this portion of the study is to help the reader understand the significant role that industry has fulfilled in workplace training.

From the earliest times the most powerful institutions in society have established universities for their own ends. The Churches in Europe were among the earliest to do so. Here the priests were trained, theology and the Bible studied, and law and medicine expounded. (Jarvis 2001, p. 3)

Jarvis (2001) described three distinct evolutions of university development throughout history. First, the church established universities for the purpose of developing ministry leaders. The next significant growth of universities was directed by civil governments. Finally, the most recent universities to emerge have been founded by corporations to develop company leaders and improve workplace performance. “The role of the universities was changing from serving the state in managing society to serving industry and commerce in ensuring people are employable” (p. 5). One of the contributions of this research is to describe both the past and current role of CUs in workforce development.

One of the earliest examples of a factory school in the United States was in 1872 when Hoe & Company of New York established a training program to help workers gain new skills to improve the assembly of the printing presses that the company manufactured (Miller, 1996). In 1913, an “Industry Association Support” meeting was held at New York University and resulted in the formation of the “National Association of Corporation Schools.” This association represented 34 corporations and later became known as the American Management Association (AMA) (Beatty, 1918).

One of the earliest workplace training institutions to use the word “university” described in academic literature was developed by the Goodyear Tire and Rubber Company (Allen, 1949; Moore, 1982). Goodyear’s Industrial University was established in 1913 to address the training and development needs of its 35,000 employees. Within seven years the Goodyear program had grown to four different schools (a) production, (b) sales, (c) commerce, and (d) household arts and had taken on the mantle of Goodyear University (1920, *University and Factory, New York Times*). The *New York Times* article

stated that Goodyear University employed 110 teachers with an enrollment of 6,000 employee participants. Upon successful completion of the three year Goodyear University program, graduates could earn one of two company diplomas: (a) Degree of Master Rubber Worker and (b) Degree of Graduate Rubber Mechanic. The identification of Goodyear's University is a possible addition to academic literature, as Goodyear University has not been cited or mentioned on the list of early CUs in the United States.

The first CU cited by most scholars is General Electric's Management Institute of Crotonville New York in 1955 (El-Tannir, 2002; Freifeld, 2008; Gerbman, 2000; Gould, 2005; Meister, 1998; Veldsman, 2004). Freifeld (2008) stated that the goal of the GE program was to develop a succession planning process that would educate GE's emerging leaders. GE's leadership program is still in operation today and is a model within the industry. In 1963, Walt Disney created Disney University in Anaheim, California to ensure that all new employees understood and delivered the service he envisioned (Lipp, 2013). Lipp described that the mission of Disney University is to ensure that employees understand Disney history, values, traditions, and brand. The most cited example of a corporate university is McDonald's Hamburger U. Opening in 1963, this CU claims to be the nation's number one trainer, even larger than the United States Army for the size and scope of its workplace learning endeavor. Hamburger University trains employees in 65 countries and translates its curriculum into 18 different languages (Meister, 1998). Recently, Farmers Insurance developed their university to improve their sales, customer service, and claim accuracy (Allen, 2010). In 2013, Hewlett-Packard launched HPU to train employees to fill current and future roles within the organization (Battipede, 2013).



Four predominant associations for Corporate Universities currently exist. They are: (a) CorpU, (b) The Corporate University Enterprise, (CUE), (c) The Global Association of Corporate Universities and Academies, (G-AUCA), and (d) The Global Council of Corporate Universities, (Global CCU). CorpU was founded in 1997 as a for-profit education research and consulting firm that designs and launches corporate universities. CorpU provides developmental resources and consulting, publishes annual research, and gives annual excellence and innovation awards for corporate learning and talent development; it requires an annual membership fee. Next, the Corporate University Enterprise, (CUE) was founded in 1998, as a privately held, for-profit business focused on developing, launching, managing, and refining corporate universities. CUE provides training resources for purchase and hosts the annual “Corporate University Summit.” CUE has no membership fee; however, there is an expectation that an organization purchase services as needed. Next, the Global Association of Corporate Universities and Academies (G-ACUA), located in the United Kingdom, was founded in 1994, and is a private, for-profit organization that custom designs and delivers programs for management development, as well as corporate university design; and G-ACUA requires an annual membership fee. In 2014, I had an e-mail correspondence with Richard Dealtry (personal communication, August 28, 2014), the founder of G-ACUA and author of the book *Corporate universities: Developing strategic best practices for growth and development* (2010).

Professor Dealtry wrote to me:

Since [the book’s] development it is also used by many organisations in a formative design mode to get that unique outcome that defines the optimum company corporate university structure and best practices for each different

organisation's situation, its particular circumstances and its strategic and operational priorities.

Finally, the Global Council of Corporate Universities, (Global CCU), was founded in 2005 as a for-profit organization for the support and certification of CUs globally. In 2012, the Global CCU began its annual award process to recognize CUs that create value for people, business, and society. Global CCU has an annual membership requirement; however, they do offer limited access to organizational resources to affiliate members.

In summary, this portion of the literature review has focused on the development of factory schools and how they helped form the foundation for the modern corporate university. The literature review described the chronological history of CU development within the United States. Churches, civil governments, and corporations have all developed universities to train emerging leaders within their organizations. The earliest CU identified in the literature was the Goodyear Tire and Rubber Company in 1913. The first CU cited by most scholars was General Electric's Management Institute in 1955. Also developed in the early 1960s was Disney University, as well as McDonald's Hamburger University (HU). Recently, organizations such as Deloitte, Farmers Insurance, and Hewlett-Packard have developed CUs to improve their workforce learning and development efforts. Finally, this review identified four CU associations CorpU, CUE, G-ACUA, and Global CCU that exist to meet the workforce development needs of industry and corporate universities.

### **How do CUs Differ from Training Departments and Traditional Universities?**

*“Knowledge creation is attributed to the traditional universities, however, corporate universities help employees learn and produce knowledge in many*

*ways seeking new solutions to work problems . . .” (Jansink, Kwakman, & Streumer, 2005, p. 40).*

One of the many ways a corporate university is distinguished from a training department is the breadth of audiences that it serves, including employees, customers, vendors, and communities (Meister, 1998). Gerbman (2000) stated that traditional training programs are more reactive while CU programs are more proactive. Walton (2005) asserted that the traditional university has become progressively more corporate in their outlook, while corporations are becoming more knowledge-based in their viewpoint. Veldsman (2004) identified 21 differences between a training department, corporate university, and a traditional university (p.28). These differences appear in Table 1.

Veldsman’s research (2004) provide concrete examples of the unique focus that CUs yield in the workplace. Kiely (2007) stated that it is time to recognize that corporate universities are very different from traditional training departments. Furthermore, Walton (2005) identified the following differences:

Learning within the traditional university is here associated with scholarly activity and a teaching and research culture projecting meaning orientation towards intellectual pursuits given the special role assigned to universities by society. Learning within the corporate university is here associated with training, continuous improvement, competitive advantage, survival, effectiveness, and growth giving meaning orientated towards the bottom line and a means to an end (p. 15).

In summary, this portion of the literature review focused on Veldsman’s research concerning the differences between training departments, corporate universities, and traditional universities. His research revealed several generalizations that training departments tend to focus on the organization’s operational needs; corporate universities tend to focus on the organization’s business needs; and finally, traditional universities focus on the broader educational needs of society in general.

### **How do CUs Effectively Manage Workplace Development?**

This portion of the review will examine current literature concerning the ways in which CUs manage workforce development. It will consider CU focus, funding, governance, curriculum, learning delivery, and educational partnerships. It will also describe some of the criticisms leveled at CUs. The new economy requires that employees engage in a life-long learning process. For this reason, it is important that corporate universities provide training resources to help workers continually develop their skills and abilities, and to allow the company to remain competitive in the marketplace. Li and Abel (2011) conducted research to show that continual development of employee knowledge and competencies positively contributes to the organization's financial performance and competitive advantage.

#### **CU Focus**

As shown in Table 1, CUs focus on business needs rather than the operational needs of the training departments or general educational needs of traditional universities. They tend to be proactive in their work and are future directed, and hold an improvement/renewal orientation. As a result, they focus on core organizational competencies.

Prince and Beaver (2002) described CUs as a tool to organize and administer the knowledge management process to sustain a competitive advantage. Corporate universities improve organizational sustainability by constantly updating workplace skills. Grenzer (2006) described that the most important goal for the CU is to be aligned with the goals and objectives of senior leadership. The ongoing development of

employees in a corporate university setting is crucial to the firm's talent development process (Everson, 2014).

### **CU Funding**

Wheeler (2005) described three funding models for corporate universities. They are (a) the corporate allocation model that requires the company to underwrite all training related expenses, (b) the partial or full cost recovery model that requires the CU to charge company departments for the cost incurred for training, and (c) the profit center model that requires the CU to sell all programs to internal or external customers at a profit. However, it has been my professional experience as a director of an electrical wholesale CU, that there is a fourth funding model not mentioned in any academic literature to date. This is the "vendor funding model." In this model, vendors who sell products through the parent organization of the corporate university underwrite course development costs for training that will be delivered on the wholesaler's Learning Management System (LMS). This model benefits the vendor, the parent organization, and the organization's corporate university. The organization's employees gain product knowledge that leads to increased product sales for both the vendor and the organization. This funding model is predominant in the CU that is examined in this qualitative case study.

Although corporate education and training may appear to be a private sector financial issue, there is some public financial support. The U.S. Federal Government supports business training efforts by allowing tax deductions for qualified workplace training costs. Training is recognized by the government as a legitimate cost of doing business. Eurich (1985) stated "Corporations can, under current tax law, write off as much as 50% of their training costs as essential to business" (p. 2). As of 2014, two IRS

tax regulations direct business concerning the deductibility of qualified workplace training expenses. The first IRS regulation is “1.162-1 Business Expenses.” This regulation states that the full amount of allowable business expenses is deductible from gross income when the ordinary and necessary expenditures directly connect with or pertain to the taxpayer’s trade or business. The second IRS regulation is “1.162-5 Expenses for Education.” This regulation states that a deductible education or training must maintain or improve skills or is to meet the requirement of the employer. In addition, companies can offer their employees up to \$5,250 in tax free educational benefits (IRS publication 15-B Employer’s Tax Guide to Fringe Benefits and IRS Publication 970 Tax Benefits for Education). To a varying degree all of the following can be legitimate company training expenditures: Training fees, materials, furniture, equipment, travel, lodging and meals, dues, subscriptions, and tuition reimbursement.

### **CU Governance**

Most corporate universities have a governing body, even if it is only represented by a Chief Executive Officer (CEO) (Wheeler & Clegg, 2005). The scope and scale of corporate universities span from the largest enrollment at over 100,000 employees to the smallest at under 500 (Todd, 2004). Todd also explained that approximately 67% of corporate universities have a governing board. A majority of the board members are principally senior executives who report to the company CEO. Todd further described that 25% of all CUs have no board and are instead under the direct supervision of the

CEO. The remaining 7% of corporate universities report directly to either a training manager or a human resource department.

Todd (2004) described that the responsibilities of the governing board are to (a) identify and prioritize future organizational needs, (b) set an organization's learning philosophy, (c) approve an organization's strategic learning plan, (d) define corporate university mission and vision, and (e) promote the corporate university to rest of the organization. In addition, Todd explained a recent innovation in corporate university leadership with the creation of the Chief Learning Officer, (CLO). The responsibilities of the CLO include (a) creating the vision, (b) building alliances, (c) developing learning solutions, and (d) operating the CU as a business unit. Grenzer (2006) stated that the most important goal for the corporate university is that it is aligned with the goals and objectives of the senior leadership.

### **CU Curriculum**

Table 1, presented by Veldsman (2004), identifies CUs as using an integrated, ongoing action/learning process. This can be seen in contrast to a fragmented, one-off learning event (the course/program) from a training department, or the teacher-mediated process of a traditional university. Eurich (1984) described the curriculum of a corporate college classroom as seeking to educate the whole person concerning the industrial, social, economic, and political order. Dealtry (2003) stated that CUs must focus on providing a workers' training curriculum that can extend between 35 to 45 years during their working careers. In addition, the curriculum included in CUs has changed over the

years. McNamara (2007) identified that the scope of CU training/curriculum has shifted to include a focus on key business, financial, technical, and ethical competencies.

### **CU Learning Delivery**

Table 1, (Veldsman, 2004), also indicates that CUs tend to use both virtual and blended learning, so that it is available “anywhere, anytime, anyhow, anyone, and anyway” (p.28). Garrison and Kanuka (2004) described blended learning as the combination of face-to-face learning with online training. CUs must provide easily accessible learning to the organization, whether face-to-face, online, or blended. Dealtry (2000) described the importance of e-learning as a way to distribute shared knowledge throughout the organization. The same author (2003) stated that learning is no longer limited to a person’s early life but a requirement throughout a person’s entire career. Companies need to organize their knowledge management process to ensure their competitive advantage (Prince & Beaver, 2002).

Paton et al. (2005) found that CU initiatives that use the Internet for training provide less disruption to the daily work schedule. Workers are increasingly accessing online self-paced learning instead of waiting to take an in-person training course (Anderson, Hardy, & Leeson, 2008). An LMS provides access to learning 24 hours a day, seven days a week, and 365 days a year and condenses learning time by 50-60% when compared to classroom instruction (Chapman, 2008). In addition, knowledge management can be undertaken with the implementation of an LMS (Bersin, 2007).

Battipede (2013) stated that Hewlett-Packard University (HPU) allows its participants to select classes by both topic and delivery method including face-to-face, live virtual, or self-paced web training. Everson (2014) described Southwest Airline



University as incorporating both online and classroom training methods. Anderson (2014) conducted research listing the current breakdown within organizations and their use of training delivery methods (Study percentages may not add to 100 because of rounding, p.44).

- Classroom – 30.4%
- Synchronous e-learning – 9.4%
- Asynchronous e-learning – 23.2%
- Formal on-the-job – 18.9%
- Other – 21.4%

It has been my experience, that a blended approach to learning delivery of 50% online and 50% classroom is effective for training in the workplace.

### **History of Business and Educational Partnerships**

Businesses and educational institutions have had formal relationships since the late 1800s (Lankard, 1995). Partnerships were created by school systems to foster school-community cooperation, provide incentives for students, supplement curriculum and staff, and obtain equipment. However, they remained rather one-sided with most of the benefit going to the educational institution (Clark, 1992). These relationships eventually grew into important partnerships by the late 1970s (Lankard, 1995). Before such partnerships could expand further, a question needed to be addressed concerning who would own the intellectual property, patents, and copyrights resulting from the partnership (Smith, 2003). This question was effectively addressed by the passage of the Bayh-Dole Act in 1984; this legislation provided necessary guidance concerning the

ownership of ideas, patents, and copyrights; and it opened the way for significant advances in both science and technology.

Nielsen, Baird, Browning, and Milliron (2003) described the purpose of business education partnerships as two-fold: (a) meet the demand of educating an evolving labor force, and (b) fund new revenue sources to educational institutions. Both business and academic institutions benefit from collaboration that leads to increased skill development and cutting-edge innovations. As an example, Indiana University's Kelly School of Management customized an MBA program for John Deere finance professionals (Meister, 2003). Finally, there is a growing trend of CUs working with academic institutions to develop non-credit, credit, and degree programs for business employees in the workplace (Li & Abel, 2011).

### **Criticism of CUs**

*Perhaps the amalgamation of terminology from the context of high intellectual endeavor with the name of a corporation that makes hamburgers and cartoons contains an inherent potential for humor: perhaps the laughter indicates a discomfort with the ideas that McDonald's or Disney could set up and run an institution to enable learning or knowledge production: perhaps treating corporate universities in this way masks fear of serious competition from the corporate sector (Taylor & Paton, 2002, p. 4).*

Corporate universities have received a great deal of scholarly criticism. Allen (2007) stated that many academics recoil when they hear the term corporate university used to describe a company training program. Some who work in a traditional university setting find it hard to endorse the concept of a corporate university (Craig, Clarke, & Amernic, 1999). Blass (2001) stated that the corporations' adoption of the title "university" has "dumbed down" the term, making it acceptable for the term to be used in

a variety of inappropriate ways (p. 15). This challenges the appropriateness of corporate bodies adopting the term “university.”

Corporate universities are most commonly found in the United States, a nation which has no legal restriction when using the word university. However, the United Kingdom has placed specific restrictions when using the word university. According to a document titled “The Further and Higher Education Act 1992 Section 77,” the use of the word “university” is restricted to an education institution only. However, Blass (2001) suggested that the UK government itself has diminished the value of the word university by promoting the term “University for Industry” (p. 15).

In an attempt to increase the status of their training departments, some business leaders have glibly added the word “university” to the nameplate (Greenberg, 1998). Waks (2002) stated that CUs are merely shadow organizations with no official status. One academic critic stated that “corporate training programs can become in-bred and incestuous, raising the question about freedom of inquiry and opinion, particularly when questions differ from the established ethos” (Eurich, 1985, pp. 54-55).

In defense of the term “corporate university” Wills (2001) suggested that corporations who use the term “university” are attempting to gain a positive association with a learning environment. She further stated that corporations do produce new knowledge in the form of research and development. Finally, Wills suggested that the use of academic terms by CUs will continue to grow as partnerships with higher education increase.

In summary, this portion of the literature review described the structure and functions of a CU. It is critical that the CU aligns with the goals and objectives of senior

leadership. In addition, CUs organize and administer the knowledge management process for the organization. CU training curriculum focuses on key business, financial, technical, and ethical competencies. Three funding models were described, the corporate allocation model, the partial or full cost recovery model, and the profit center model. Concerning governance, most corporate universities have a governing body, even if it is only represented by a CEO. Business education partnerships are used to meet the demand of educating an evolving labor force and fund new research in science and technology. Finally, some academic scholars have criticized the use of the word “university” to describe a workplace training department.

### **What do Empirical Studies say About CUs?**

This section will review empirical studies concerning CU operations. It begins by describing some of the characteristics of CUs. It will then turn to studies examining evaluations of CUs, and it will describe some of the effects of CUs. The final portion of this section will present a model that integrates the operational characteristics and effects of a CU.

#### **CU Operations**

Patterson (1998) conducted a mixed method study to explore the differences between CUs that formed partnerships with higher education and those that did not form partnerships or were described as stand-alone. The study showed that the stand-alone CUs had a greater interest in developing employee competencies and skills in order to benefit the company, as opposed to the partnering institutions that focused more on providing educational opportunities for the benefit of the employee. The research

showed that both of the arrangements served to enhance the corporation's competitive position in the labor market.

Blass (2001) conducted a comparative study between the traditional public university sector and the developing sector of corporate universities. This study showed that despite areas of convergence, the comparative evidence is clear. Corporate universities and public universities are two very different configurations with different aims. Walton (2005) conducted a comparative analysis of the similarities and differences of traditional universities (TUs) and CUs, comparing their mission statements, core values, and objectives. The study found little commonality between the focus of TUs and CUs. This may result from the fact that the two come from different traditions. Learning within the TU is associated with scholarly activity, teaching, and research. Learning within the CU is associated with training, continuous improvement, and competitive advantage, qualities that are oriented to improve the organization's bottom-line.

El-Tannir (2002) conducted a qualitative case study to identify and describe the main characteristics of three CUs. The study showed that the CU model is suitable for a continuous learning process within the corporate workplace. The CUs allow more flexibility, as well as offering employees the opportunity to participate in a self-learning process where real business problems are solved.

Ryan (2008) conducted a mixed method research of CU partnerships with higher education. This study found that, within both the corporation and its university partner, it is important to develop a shared vision concerning the purpose of the partnership. In addition, there is a need for regular communication between managers of both organizations to ensure trust and openness between the corporation and its university

partner. Finally, the study found that it is important for the university to take time to get to know their corporate partner, their educational needs, and the role the university can provide the corporation. This action helps to generate long-term relationships rather than having the university partner being viewed as an outsourced provider of contracted education on an as-needed basis.

Allen (2010) examined the current practices of CUs on a global scale. This study showed that emerging CU models have many similarities and a few differences, with one common theme: they are designed to expand organizational capabilities by using learning as a strategic lever. As most organizations profess that their most valuable asset is their people, there is a great competitive advantage in finding innovative and effective ways to increase the value of human capital.

Abel and Li (2012) developed and implemented a survey of CUs. Their findings revealed five prominent processes of CUs based on factor analysis. The five processes are: alignment and execution to support the company mission, developing skills that support business needs, using technology to support workplace learning, learning and performance evaluation, and partnerships with academia. Most CUs remain corporate-driven initiatives with a centralized structure and supported by a corporate budget.

Concerning the future, Prince and Stewart (2002) described a CU's role in integrating and supporting organizational learning. The study suggested that the success of CUs of the future will rely more on their ability to manage complex interactions of organizational learning subsystems, and less on their ability to manage training programs. Future CUs will be charged with leading the organization's knowledge and learning

initiatives, and will need to be much more proactive and inclusive, in addition to being at the center of the organization and its decision making efforts.

In summary, this section of the literature review described several empirical studies and their findings concerning the characteristics of CUs. One mixed method study explored the differences between CUs that formed partnerships with higher education and those that did not. Findings indicated that stand alone CUs had a greater interest in developing employee skills to benefit the company, while those partnering with higher education focused on skill development to benefit the employee. Another study compared the focus of traditional universities to the focus of corporate universities and found some small areas of convergence. However, in general, both CUs and TUs have very different aims. Finally, empirical research continues to indicate that most CUs remain corporate-driven initiatives for the purpose of employee development to meet the operational needs of the organization.

### **CU Evaluations**

Allen (1999) conducted a qualitative case study examining four CUs and their use of the Kirkpatrick measurement model in evaluating training effectiveness. Kirkpatrick's four levels of evaluation are: (a) level one - reaction, (b) level two - learning, (c) level three - behavior, and (d) level four - results (Kirkpatrick & Kirkpatrick, 2006). The study showed that despite each of the CU's common reliance on the Kirkpatrick measurement model, none had evaluation practices that were similar. As each CU had a different mission and different training programs, and these differences affected the practical evaluation methods for each institution.

Bober and Bartlett (2004) conducted a qualitative case study of four CUs to determine how they used the evaluation of training data to improve their training programs. The study found that the major users of the evaluation information included evaluation staff, instructional designers, instructors, directors of corporate universities, and upper-level management. The study also revealed that the evaluation data were used to make improvements to internal training programs as well as to provide a justification and accountability mechanism for organized training programs.

### **CU Effects**

Morin and Renaud (2004) conducted an empirical quantitative study concerning the effect of CU training programs on employee job performance. Results from a regression analysis revealed that participation in corporate university training had a relatively small effect on individual job performance after controlling for pre-training job performance as well as job and individual characteristics. However, the findings did indicate a positive linear relationship between the number of CU training courses completed and job performance.

Rademakers (2005) examined the rapid growth of CUs and their connection to economic and social forces. The study found that companies endorsing the importance of knowledge innovation and competitive advantage need to consider the role of a CU in their business strategy. Three CU types were identified: first, the “School” acting as a disseminator of knowledge; second, the “College” acting as a redistributor of knowledge transfer and exchange; and third, the “Academy” acting as a driver of knowledge, innovation, and creation.



Holland and Pyman (2006) conducted an in-depth case study of one CU as a strategic platform for creating organization competitiveness and developing human capital. This study showed that the development of the corporate university within the organization had focused resources to develop their human capital. Furthermore, the development was clearly linked to the strategic objectives of the organization to enhance a competitive advantage.

### **An Integrated CU Model**

The empirical research has identified a number of operational factors that are important to the successful development of a CU. The model, shown in Figure 2, illustrates integration of the academic research on CUs from this literature review. It incorporates the four profiles from Abel's (2008) work and additional processes identified by other researchers. Thus, it indicates an open system incorporating the "Input–Transformation–Output" model as described by (Kast & Rosenweig 1972, p. 450). This model indicates the importance of the Organizational Profile as being aligned with the organization's mission, and the Learning Delivery Profile, as including a variety of offerings accompanied by program evaluation. It also includes the Operational Profile, which provides the needed resources and technology, as well as the Partnership Profile, that encourages the needed partnerships and outsourcing.

### **Summary**

*There is no influence on learning and development more pronounced than the growth of the corporate university (Elkeles & Phillips 2007, p.32).*

The implications of change concerning the workplace are truly significant. Global competition has forced most organizations to completely reinvent themselves. The growth of information, the introduction of new technology, and improved business

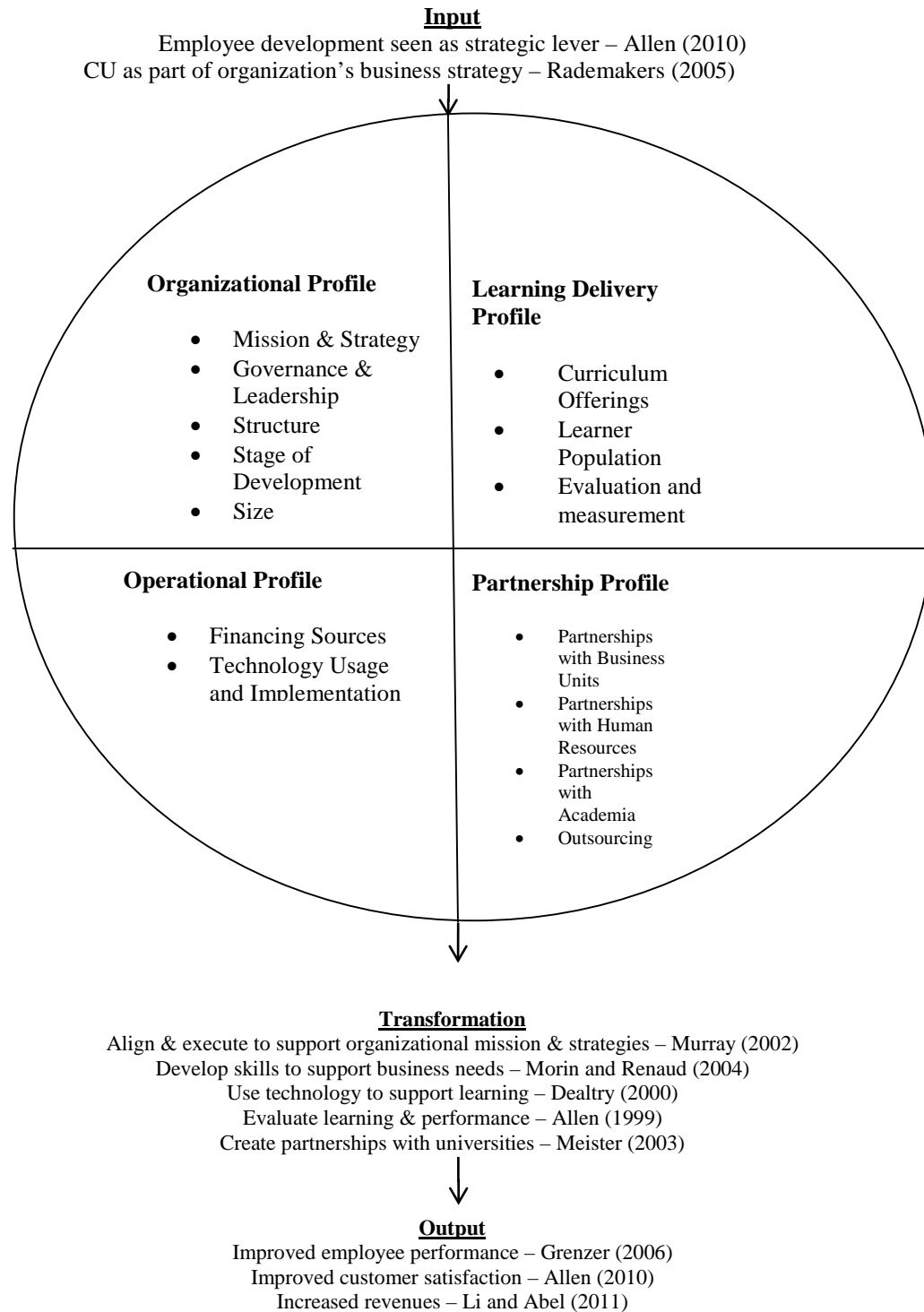
practices have significantly impacted the business-as-usual operating model. The purpose of this literature review was to gather and evaluate the most current academic research concerning the role of CUs in workplace training. Four primary questions directed the literature review:

- What is the development history of CUs?
- How do CUs differ from training departments and traditional universities?
- How do CUs effectively manage workplace development?
- What does the empirical research literature say about CUs?

These questions provided a basis for the investigation of the literature, as well as a framework to: (a) understand the problem, (b) formulate a research design, and (c) provide valid answers to each of the research questions.

This review has resulted in the adaptation of an existing model by adding processes involved in the CU and some of the expected outcomes. Abel (2008) developed a conceptual framework for defining and classifying corporate universities. This framework theorizes that four profiles containing 15 operational factors form the underpinning of many CUs. The profiles are: (a) the organizational profile describes factors of a CU's strategy and mission, governance and leadership, stage of development, size, and years in existence: (b) the learning delivery profile describes factors of a CU's curriculum offerings, learner population, evaluation and measurement processes: (c) the operational profile describes factors of a CU's financing sources, technology usage and implementation: and finally, (d) the partnership profile describes factors of a CU's relationship with other internal business units, human resources, academia, and

outsourcing. This case study has provided a framework to assist other CUs in making informed decisions concerning their workplace training operations.



*Figure 2. Conceptual framework & Integrated CU Model. (Adapted with permission)*

Table 1

*Differences between Training Departments, Corporate Universities, and Traditional Universities.* (Used with permission)

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<b>Training Department</b>	<b>Corporate University</b>	<b>Traditional University</b>
Operational needs	Business needs	General education needs
Reactive: present 'fix it' orientation	Proactive: future directed, improvement/renewal orientation	Reactive/proactive: past, present, future orientation
Fragmented, one-off learning event (the course/program)	Integrated, ongoing action learning/teaching process	Teacher led/mediated process
Limited range of learning modalities and delivery methods	Virtual, blended learning: anywhere, anytime, anyhow, anyone, anyway	Predominantly residential, prescribed courses offered over and within set period
Individual, internal employees	Intact teams/communities of practice	Individual student
Individual technical skills	Core organizational competencies	Generic knowledge/expertise/skills
HR owns training and development	Business owns learning/teaching	Academic institution owns education

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### **Chapter 3: Materials and Methods**

The purpose of this study was to identify, examine, analyze, and compare the significant features and methods associated with a currently operational CU to the conceptual framework defining and classifying corporate universities. The description of the design of this study is organized by: (a) personal disclosure, (b) philosophical approach, (c) methods, (d) data collection, (e) study sites, (f) study participants, (g) direct observation, (h) interviews, (i) documents, (j) artifacts, (k) data analysis procedures, (l) strategies to ensure soundness of data, and (m) strategies to ensure protections of human subjects.

#### **Personal Disclosure**

The purpose of this subsection is to describe the experience and worldview I brought to this research. I had a personal interest in this study. As a workplace educator I have personally witnessed the value of my organization's efforts to continually develop our peoples' knowledge and skills to surpass both our regional and global competition. It has been my experience that a learning organization such as Platt has a competitive advantage in the marketplace. The only sustainable competitive advantage is an organization's ability to learn faster than the competition (Senge, 2006).

As a director of education for a CU, I have helped employees pursue and achieve their personal career objectives as well as helped them complete their Associate, Bachelor, and Master's degrees while they are working full-time within the Platt organization. I have also had the privilege of teaching within the higher education system as a part-time adjunct faculty member working with adult learners at both the community college and university level. Continuing education has played a significant

role in my 32 years at Platt. I began my career as an entry-level delivery driver in Platt's Olympia, Washington branch in 1983 and advanced quickly from entry-level driver, to warehouse, sales, assistant manager, and then branch manager. As a newly appointed Branch Manager, I realized that I needed help in developing my leadership skills and business knowledge so I enrolled in an evening class for management training at South Puget Sound Community College in Olympia, Washington.

The community college system provided immediate access to important leadership and business training. Many of my teachers were part-time adjunct faculty members who directed their own successful businesses during the day and then shared their work experiences at night school. As I began to apply these helpful business and leadership skills, our branch sales increased dramatically. Soon our branch surpassed all previous business goals set within the region. In 1990, our company president asked me to move to Beaverton, Oregon and direct our newly developed corporate university program.

### **Philosophical Approach**

The purpose of this subsection is to provide a background for the philosophical approach that I used in this research project. I selected the worldview of post-positivism as my guide to this study. First, I will describe the difference between the positivist and post-positivist view. Zammito (2004) stated that the term positivism was first coined by Auguste Comte in the nineteenth century. Positivists contend that knowledge is scientific and exists in three forms: (a) specific observations, (b) laws or generalizations, and (c) theories and descriptions (Bredo & Feinberg, 1982). Post-positivists however, believe that observations are imperfect and influenced by the bias of the observer (Trochim &

Donnelly, 2008). Zammito, further noted that scholars Willard Quine and Thomas Kuhn were considered cofounders of the post-positivist epistemology. As a researcher, I am aware that my personal bias will inevitably influence this research.

Researchers are inherently biased because of their worldview and life experiences (Trochim & Donnelly, 2008). However, I also believe that the awareness of my personal bias and the inclusion of individual beliefs, values, and experiences have provided a criterion for truth within this case study. The Institutional Review Board (IRB) at Oregon State University also identified a conflict of interest within this study as I directed the CU within this research project. To address the conflict, the IRB required that I bring in an independent researcher to conduct the employee interviews and classroom observations.

## **Methods**

I chose a qualitative approach for this research project. Glatthorn and Joyner (2005) described qualitative research as a process that gains information by focusing on the meanings and perspectives obtained by participating in a natural setting. Creswell (2008) described qualitative research as broad and inclusive and seeking to understand participant experiences. In addition, Patten (2009) described qualitative non-experimental studies as allowing researchers to observe participants and then describe what they saw in the natural setting. Yin (2009) stated that qualitative research, especially case studies, have been stereotyped as weak among social science methods. However, Glatthorn and Joyner (2005) defined the case study as empirical research that investigates contemporary issues in a real-life setting.



The case study method allowed the independent researcher to examine first-hand the operations of this CU and interact directly with participants within the organization. This level of interface provided significant insights into both the operation and culture of the organization. Yin (2009) stated that case studies are all-encompassing and comprehensive. Yin described that case studies rely on multiple sources of evidence concerning logic of design, data collection techniques, and data analysis. Finally, Yin stated that a case study is an empirical inquiry that investigates phenomenon within its real-life setting and is helpful when boundaries and context are not clear.

### **Data Collection**

This was a bounded case study. Creswell (2008) described a bounded case study as being limited to a specific place and time, and it requires that multiple data sources be examined. For this reason, the study thoroughly examined the (a) study site, (b) study participants, (c) interview results, (d) observational results, (e) organizational documents, and (f) artifacts.

### **Study Site**

This study provided a snapshot in-time that documented the participation of this specific CU and its members. As an electrical wholesale distributor, the organization delivers electrical construction materials from 123 branch locations throughout nine western states. The primary classroom observation research site was at Platt Electric Supply 10605 SW Allen Blvd Beaverton, OR 97005, the company's headquarters. Additional employee interviews were also held at selected branch locations in the greater Portland Oregon area.

## Study Participants

Participants consisted of two groups: (a) company employees and (b) outsourced vendors. Company employees were directly observed in two classroom settings and interviewed by the independent researcher. Finally, the three outsourced vendors were interviewed by the independent researcher within the greater Portland area.

**Direct observation.** Two direct observations were conducted by the independent researcher. The first class observation was on January 7, 2015 and the second was on January 8, 2015. The January 7 class had 20 employee participants and four employee instructors, and the January 8 class had 16 employee participants and four employee Instructors. Concerning class observations, IRB protocol required the independent researcher to provide information about the research to class participants 10 days prior to the course session. Five days prior to the course the independent researcher contacted each participant and held a private phone conversation lasting 5-15 minutes to answer questions and give participants an opportunity to decline prior to class. Participants could choose not to be observed in the classroom without penalty. The class instructor provided an alternate location within the classroom where the participant would not be observed, but was still able to attend the session. No class participant declined to be observed. The independent researcher followed a similar protocol with the instructors. Instructors were given an opportunity to decline without penalty and an alternative instructor would take his/her place. No instructor declined to be observed. The independent researcher was introduced at the beginning of each class and gave out a copy of the consent document to both participants and instructors. To maintain anonymity, no signatures were gathered and no video recording or pictures were taken in the classroom.

Each class observation lasted eight hours. As the CU director, I limited my normal management and teaching duties during these observations.

Merriam (1998) stated that direct observation captures critical information that is needed to build validity and reliability. I developed the observation checklist used by the independent researcher to gather specific information on the behaviors in the two classroom observations. (This checklist appears in Appendix B). Creswell (2008) stated that it is vital for a researcher to document and rate observable behaviors. Hancock and Algozzine (2006) described that an observation guide is an effective tool to collect initial impressions and interpretations of observable behavior. The authors explained that this guide can also collect important information such as date, time, location, name, gender, and job position of the person being observed. All procedures were approved by the Institutional Review Board (IRB) at Oregon State University, and case study participants were protected under those guidelines.

**Interviews.** Interviews were conducted by an independent researcher as required by the IRB protocol and proved to be a significant source of evidence. Stake (1995) stated that the two key principles of a successful case study are to obtain the reflections and interpretations of the participants being interviewed. Under the direction of the IRB, my role was to develop the interview protocol and lists of interview questions for the independent researcher to follow. Appendix C provides the interview questions for each of the participants. Hancock and Algozzine (2006) described that the interview protocol will identify suitable open-ended questions that help the researcher gain insight into the study's essential research questions. Creswell (2008) stated that data collection requires: (a) identifying and selecting individuals for study, (b) obtaining permission to study the

site, and (c) creating interview questions. As a student researcher, I sought and received permission to access the site and demonstrated respect by disturbing it as little as possible. I met with the President/CEO and secured permission to conduct this case study. Company leadership supported this independent academic assessment to gain information concerning the overall effectiveness of the CU within the organization.

The independent researcher followed IRB protocol and provided information about the research project 10 days prior to the interview. Five days prior to the interview the independent researcher had a private conversation with the interviewee to answer questions and gave them an opportunity to decline prior to the interview. Each interviewee received a copy of the consent document and no written consent was required. Each interview was audio recorded in order to ensure accuracy in understanding. A professional transcriptionist transcribed each interview into a written document, and the independent researcher asked each interviewee to read the transcript for accuracy. Once the interviewee approved the transcript, the independent researcher removed the person's name and any identifying information and sent it to me for coding and analysis.

The interviews used a combination of both random sampling and purposive sampling methods. Patten (2009) described purposive sampling as a way for the researcher to direct the search to those individuals or organizations that likely have the desired information or characteristics. The total number of case study interview participants was 18. Concerning purposive sampling, the following company officers and outsourced vendors were selected for their industry knowledge and specific experience:

- (1) President/CEO
- (1) VP of Human Resources
- (1) VP of Marketing
- (1) LMS National Account Manager - vendor
- (1) Community College Administrator - vendor
- (1) Sales Training consultant - vendor

Concerning the random sampling, the independent researcher randomly selected people in the following roles from 125 employees in the greater Portland Oregon area.

- (1) Division Manager
- (2) CU Instructors
- (4) Branch Managers
- (5) Branch Employee Participants.

This study's participants were interviewed between January 2, 2015 and February 28, 2015. All case study participants were protected under the IRB Guidelines at Oregon State University.

**Documents.** Documents published by the company were thoroughly reviewed. Examples include:

- Company mission and strategies
- CU mission and strategies
- Company core competencies and values
- Training and development matrix

This collection and review of documentation provided a context for the classroom observations and recorded interviews.

**Artifacts.** I gathered artifacts specifically related to the organization's learning culture to provide rational and relevance to this study, as well as a social and cultural context. Examples of artifacts include:

- Photographs of classroom layout, training equipment, and floor plans
- Training program brochures
- Training program logos including Platt University
- Career Development chart

Yin (2009) stated that most artifacts are designed for a particular audience and purpose, and for this reason, it is important that the researcher understand the context before making any interpretation.

### **Data Analysis Procedures**

Creswell (2008) described data analysis procedures as: (a) analyzing the data by taking it apart and putting it back together, and (b) describing information and developing themes within the data. First I organized the data into files. I next analyzed the data by reading it several times to gain a general understanding of any emerging themes or comparisons. I then organized the data, assigned codes, and developed 36 possible themes from over 1400 interview comments.

Concerning the analysis of observations, this study examined workplace learning activities, including classroom presentations, learner participation in small group activities, learner interaction with technology, and learner/teacher interactions. These activities were then compared to the conceptual framework's profiles and factors. Yin (2009) suggested that the participant-observer role may actually limit the time needed to take sufficient notes. Knowing this, I asked the independent researcher to spend a full

eight hours observing each class to collect important information necessary for the analysis process. In relation to the analysis of documents, I organized and evaluated university publications including course syllabi, training agendas, training calendars, and course descriptions. Yin recommended that researchers narrow their focus to specific objectives or themes when they collect documents. This process aided my research analysis and interpretation process as not all documents contained relative information.

Concerning the analysis of physical artifacts, I sorted, categorized, and examined the university's icons including crests, logos, insignias, job-aids, certifications, and awards. The analysis of these artifacts provided a broader prospective of the organization's mission and culture. Finally, with reference to the analysis of archival data, I evaluated the number and type of course offerings, course enrollment totals, completion rates, curriculum offerings, and number of college credits awarded from our academic vendor. Yin (2009) cautioned researchers that most archival records were produced for a specific purpose and audience and that it is important to acknowledge this during the analysis process.

### **Strategies to Ensure Soundness of the Data**

I ensured data soundness by following three procedures: (a) triangulation, (b) member checking, and (c) external audit. Triangulation is described as corroborating information from multiple sources to validate the support of a similar theme (Yin, 2012). I achieved triangulation by providing two lists of employees and outsourced vendors to the independent researcher so that the interviews obtained two different perspectives: (a) a list of purposefully selected employees and vendors who held specific leadership roles and industry experience, and (b) a list of 125 company employees in the greater Portland

area who the independent researcher randomly selected for interviews. When the interviews were completed, I examined and coded 266 pages of transcribed interview and observation notes looking for similar descriptions or themes. Furthermore, I used several different sources of data in addition to the interviews, such as the CU documents and archival data.

I ensured the soundness of this study by using a member checking process. Creswell (2008) described member checking as the researcher asking each interview participant to review their transcribed interview for accuracy. The IRB protocol directed the independent researcher to require each of the 18 interview participants to review their transcribed interview answers and evaluate them for accuracy. Once approved by the interviewee, the independent researcher removed names or any identifying information and forwarded them to me for analysis. A final method was used to ensure trustworthiness. An external audit was completed by obtaining the services of an academic scholar to conduct a written review describing the strengths and weaknesses of the study.

### **Strategies to Ensure Protection of Human Subjects**

The Institutional Review Board (IRB) of Oregon State University approved my research proposal, survey questions, and interview protocol on October 14, 2014. Creswell (2008) stated that individuals who participate in the study have the right to know: (a) that the study is scientifically designed and sound, (b) that the purpose and aims of the study will be approved by the IRB, (c) that participants received informed consent, and (d) that the researchers were qualified and trained in research methods.



Because of the issues surrounding conflict of interest, an external researcher undertook both the interviews and observations. The independent researcher received the interview information after the participant had confirmed the content of the transcript. The independent researcher then removed all identifying information before forwarding it to me.

Each interview participant and observation participant was provided with a document that explained the requirement to gain their consent to participate in the study. This document also explained the participant's right-of-privacy and anonymity. Upper-management at Platt did not receive research information that attaches a specific individual to their interview comments.

### **Summary**

The design of this qualitative study examined the factors involved in a specific CUs operations using Abel's framework as a guide. This research used a bounded case study approach that was limited to a specific place and time. Data were collected from (a) documentation, (b) artifacts, (c) direct observation, and (d) interviews. Data analysis and triangulation, member checking, and external audit were conducted to ensure the soundness and trustworthiness of the information. This study made all necessary efforts to promote ethics and protect the rights of all participants.

Chapter 4 presents the results of the study. Chapter 5 discusses the findings based on examination of study results, the implications of the study for practice, and makes recommendations for further research.

## **Chapter 4: Results**

The purpose of this bounded case study was to examine a specific electrical wholesale distributor's corporate university's operational factors using Abel's conceptual framework for defining and classifying corporate universities as a guide to this study. This framework was developed in 2008 and theorizes that four profiles containing 15 operational factors form the underpinning structure of many CUs. This study examined and described each profile and the associated factors and the way in which they related to this specific electrical wholesale CU's workforce development efforts. The following research questions informed this study: (a) what is the history of this particular CU, and (b) what are the operational factors associated with this particular CU? As this is a highly successful CU that has been in continual operations for over 27 years, the results of this case study can assist other CU leadership in making informed decisions concerning their workplace training efforts.

The research findings in this chapter are based on the following data sources: direct observation of the study site, interviews, classroom observations, and review of documents, and artifacts. Study participants described their perceptions and experiences within the operational factors and history of the currently operating CU.

### **Background**

This study was conducted at the headquarters of a regional electrical wholesale distributor based in the Pacific Northwest. The Institutional Review Board (IRB) at Oregon State University prescribed protocols that required the appointment of an independent researcher to conduct both the research interviews and classroom

observations. The introduction of the independent researcher effectively addressed the bias and conflict of interest questions identified within this study.

The participants in this study were comprised of two groups, (a) company employees and (b) vendor-partners. Company employees were further divided into two research sub-categories: (1) those who participated with interviews, and (2) those who participated in classroom observations. The interviews consisted of a combination of people selected by random sampling and purposive sampling. For reporting purposes, and to protect participants' identities, each interview participant was assigned a pseudonym. Furthermore, those pseudonyms indicate the type of interviewees. Those interviewees who were Governing Board members were given names that began with G. Company Employees were given names that began with the letter E. Those interviewees who were Vendors were given names that began with the letter V.

Six people were purposively selected for their industry knowledge and specific experience. They were:

- (1) President/CEO and Governing Board, given G name
- (1) VP of Human Resources and Governing Board, given G name
- (1) VP of Marketing and Governing Board, given G name
- (1) Community College Administrator – (Outsourced Vendor), given V name
- (1) LMS National Account Manager – (Outsourced Vendor), given V name
- (1) Sales Training consultant – (Outsourced Vendor), given V name

Next, 12 company employees were randomly selected for interviews using a blind-draw method. The independent researcher drew from a pool of 125 employees working in the greater Portland, Oregon area. Currently Platt's 1,240 person workforce is 88% male and the company is actively seeking to increase the number of women employees. Nearing the end of the interview process, the independent researcher reported that 15 men had been interviewed with no women employee voices represented.

We both agreed that it would be important for females to participate in the interview process. I provided a second list of female employees in the greater Portland area, and the independent researcher randomly selected female employees to interview. All identifying information was removed by the independent researcher. They were:

- (1) Division Manager – given E name
- (2) CU Instructors – given E names
- (4) Branch Managers – given E names
- (5) Branch Employees – given E names

Next, the classroom observations involved 44 company employees and instructors. The total number of all research participants was 62 people, 18 interviewed and 44 observed in the classroom. All study participants were given an opportunity to decline participation in the observations and interviews.

### **Study Findings**

Three themes emerged from the data:

- Factors consistent with Abel’s conceptual framework for defining CUs.
- Factors not consistent with Abel’s conceptual framework for defining CUs.
- New factors and profiles.

While the themes are reported as being distinct, there are overlaps among them. Also, some participants’ responses have addressed more than one theme and when this occurred these responses were described where they fit most understandably. Evidence is presented within this chapter demonstrating that this particular CU had a linkage to each of Abel’s four profiles and 15 operational factors. It is also noted that this research project identified one new profile and five new operational factors that were not originally identified in Abel’s conceptual framework listed below. The next portion of

this paper will examine each of the three themes and their relationship to the four profiles and 15 factors in Abel's conceptual framework.

### **Theme #1: Factors Consistent with Abel's Conceptual Framework for Defining CUs**

This theme will be discussed in four parts as Abel's (2008) conceptual framework has four profiles. These profiles are: (a) organizational, (b) operational, (c) learning delivery, and (d) partnership. Each of the four profiles is divided into a specific number of operational factors. Using research participants' perceptions and experiences from interviews and classroom observations as well as organizational documents and artifacts each of the conceptual profiles and a majority of the associated operational factors were compared to the operations of this particular CU.

**Organizational profile.** The Organizational profile describes the CU's organizational structure. Abel (2008) defined the organizational profile as consisting of six operational factors. These factors are: (a) mission & strategy, (b) governance and leadership, (c) structure, (d) stage of development, (e) size, and (f) years of existence. I will now describe research findings for each factor.

***Mission and strategy.*** Abel divides this into two sub-factors (2008): (a) having a primary goals and objectives, and (b) communication of those goals and objectives by CU management. The CU in this case had published primary goals and objectives. Evidence was found in the organizational document titled "Platt University Training Goal for 2015" (See Appendix D). One example from this document described the specific goal of the CU adding 60 new product courses and 50 new operational courses to the 2015 curriculum.

The published mission of Platt University is to develop our people. The independent researcher also discovered evidence during several interviews that confirmed the fulfillment of the CU's mission to develop our people. Three interview participants reported that the CU helped support their workplace development needs. "The University provides training on product, safety, and culture" (Greg), "... truly [Platt] is a culture of learning . . . there are training programs that are available to everyone" (Valerie). And, "Platt is considered as one of the most advanced distributors in the United States. One of the reasons is because of our university and the way we develop our people" (Gabe).

Platt University (2013) has published six strategies supporting the mission of developing our people. They are:

- (a) advance the company culture, values, and global priorities of Platt and Rexel,
- (b) inspire lifelong learning, (c) build a leadership bench of managers and teachers, (d) increase product knowledge - we sell what we know, (e) develop effective selling skills, and (f) improve operational knowledge. (p. 1)

The independent researcher found evidence supporting the CU's strategy to advance culture and values by the CU's ability to quickly upload current workplace examples that support company culture and immediately communicate to all employees. This action keeps training current and relevant. "First, it [Platt University] makes it very easy to communicate change. So if I've got a message that I need to get out, I can develop a curriculum on the university and get it out" (Greg). "We'll take that kind of a message which is really important and drop it onto the university and track who's taken it. So it establishes consistency and expectations in culture" (Greg). Concerning the strategies of increasing product knowledge and improving selling skills one employee responded, "It's a big deal, and it's an important part of our strategy. So the university

offers not only product knowledge but selling skills, training through our BASE program" (Greg). Concerning the strategy of leadership development, one employee responded that "It is critical that we can grow our wave of leaders at Platt" (Garrett). And "Platt U plays a critical role in career tracking and developing leaders" (Garrett). Finally, concerning the strategy of lifelong learning two employees said, "My supervisor has gone out of his way to make sure that anyone who wants to grow in the company gets an opportunity to attend training" (Eaton), and "We want our employees to know that anything is possible at Platt, and if they invest in themselves, that we'll support them. And we've got the industry's best training program" (Greg).

***Governance and leadership.*** Two sub-factors are included in this profile Abel (2008): (a) CU has a governing board responsible for supporting CU operations and strategy, and (b) the CU has a formal Chief Learning Officer or its equivalent. The following identifies the evidence from the case supporting these sub-factors.

Concerning the first sub-factor, this CU had a governing board responsible for supporting the operational and strategic goals. Evidence was found in an organizational document titled "Platt University Organizational Chart - 2015" (See Appendix E). The governing board is made up of four leadership roles (a) President/CEO, (b) VP of Human Resources, (c) VP of Marketing, (d) and Director of Education.

The independent researcher interviewed three governing board members who were purposely selected for their knowledge and experience and asked them to describe their personal contribution to the operations of this CU. Their responses were: "I spent my time in terms of governance in approving our mission and our strategy overall for the university..." (Greg). "...I spend time recruiting [vendors] . . . so that we have the right

[product information] content" (Gabe). "I was able to bring Toastmasters into the PACE program. So, basically to be able to complete the PACE program, you [participants] need to have your Competent Communicator and your Competent Leadership manuals completed" (Garrett). This CU has shown strong evidence of an engaged governing board that is responsible for supporting CU operations and setting strategic goals.

Concerning the second sub-factor, Abel (2008) stated that the CU has a formal Chief Learning officer title or its equivalent. This was confirmed in the organizational document titled "Platt University Organizational Chart - 2015" (See Appendix E). This document described that this CU is managed by a Director of Education role and defines the Director's responsibilities to lead the company's training efforts through the implementation of Platt University's mission and strategies. The independent researcher confirmed that the "Director of Education" contacted every new employee to present career development options and develop a relationship with the new employee. One governing board member said:

So every employee hopefully within the very first week that they're with us receives a call from our Director of the University. And that's the first call that they get from an executive of the company. So it's a welcome call, and from the get go, we want those employees to go home and at the dinner table that night have somebody say well how was your day? And for them to say, it was pretty cool. I got a call from the Director of the University" (Greg).

During this call, the director of education welcomes the new employee to the company reviewing the employee's past work experience and future career interests. The director next explains Platt's career development process describing the specific responsibilities of the employee, their supervisor, and the organization to promote growth and development opportunities. Finally, the director invites the new employee enroll in the BASE-1 customers service class as they approach 90 days of employment. BASE-1



is a one day workshop conducted at the company's headquarters in Beaverton Oregon. During this class, employees will learn about the company's mission, strategies, and culture of from the president, take a tour of the distribution center, and learn important customer service skills from branch managers who teach the class. (See Appendix I).

***CU structure.*** Abel (2008) further divided the CU structure into four sub-factors. They are: (a) decentralized, (b) informal coordination, (c) formal coordination, and (d) centralized. This CU operates in a centralized manner and is located within the corporate headquarters building. The organizational document, titled the "Platt University Organizational Chart - 2015" does not use the word "centralized," but this document illustrates Platt University operations with a centralized focus (See Appendix E).

In a decentralized model, organizations allow individual departments or divisions to make their own decisions concerning the development of training programs. This model can lead to training results that are incongruent with the larger organization's needs as well as increased training costs due to duplications of training programs and staff. Instead, Platt follows a centralized model where the CU's governing board makes decisions concerning the development and deployment of all training programs company-wide. The centralized model helps the organization leverage training resources to be most cost effective and also allows the CU to quickly scale-up to meet new training requirements by easily expanding or upgrading demand to meet training needs.

The independent researcher interviewed two governing board members who provided helpful responses concerning centralization of CU operations and its impact on the organization. One interviewee said, "It [Platt University] scales really well ... I've

also increased the classroom piece of it [Platt University]; today we have about 75% of our people that will attend here in this facility...So we continue to make it [Platt University] a more important piece of everything we do" (Greg). Also, "Having Platt University gives our people opportunities" (Garrett). And "Platt University is the one thing that really binds us together" (Garrett).

A significant structural change will take place in 2016. The parent company, Rexel, announced plans to deploy the new "One Rexel Academy" a global Learning Management System (LMS) world-wide. The new global LMS will incorporate all existing CU LMSs, including Platt University, into a single academy and will provide Platt University with its own customizable home page. This home page will allow Platt employees to quickly find specific content related to Platt. This new academy/LMS appears to be a "Hybrid" of the centralized model.

Wheeler and Clegg (2005) described the hybrid model as giving each company banner some limited autonomy to create training appropriate for their business needs. There will be global oversight and decision making from the Paris headquarters to ensure program consistency and that best practices are shared between business banners.

***CU stage of development.*** Abel (2008) identified four levels of development for CUs: (a) getting started, where procedures and processes are being developed; (b) operations up and running, where employees are starting to understand the benefits of the CU; (c) well established, where employees regularly use programs and the CU is seen as a benefit; and (d) the CU is recognized, where it has received awards and business units utilize the CU.

Research indicated that this CU is at operating at level three and four. Interviews provided evidence confirming level three in that employees regularly use programs and see the CU as a benefit. One participant said, “I think Platt University is a wonderful tool that we have and we're very fortunate to have it” (Emily). “...really they [Platt University] are a best-practice in terms of creating the culture of learning and utilizing their tools and resources...” (Valerie). As Greg stated

I've been a big driver in terms of the university. When I got here we had about 25,000 classes that were taken a year which I know seems like a lot. But I really felt like we were underutilizing this resource, and so for the last year, 2013, our employees took 113,000 courses in the university.

“...they [Platt University] are constantly developing on-line modules to help further our career and help further our knowledge and skill development” (Eaton).

Concerning level four, interviews confirmed that business units utilized the CU to help train and develop their employees. “I create product webinars that Platt people can view and learn about the products we can sell to customers” (Vance). “We educate our people through our university so they, the employee, can educate our customers to make an informed decision about their purchases” (Elden). “We have an advantage over the competition, because I am able to hire people who have great core values but lack product knowledge, and train them in the university” (Elias). Additional evidence concerning level four appears in the form of awards; specifically, this CU has received a workforce development and partnership award from Clackamas Community College. (See Appendix K). Also, Mt. Hood Community College presented Platt University with a partnership award. (See Appendix L).

Finally, the company’s LMS provider, BlueVolt, sends their newest customers to tour Platt University to learn how an effective workplace training program is managed.

To encourage the sharing of best practices, the CEO for Rexel global operations asked several of his international business unit leaders to visit Platt University and learn about the success of Platt's training programs. Rexel leaders from Austria, Australia, Belgium, Canada, China, France, Germany, New Zealand, and Switzerland have visited Platt University to learn how we train our workforce. The business leader for Rexel's Asia Pacific operations, headquartered in Beijing China, attended training at Platt University and said, "I think I have found the 'Holy Grail' for sales training at Platt" (M. D. Williams, personal communication, April 1, 2015). Platt University freely shares best practices in training with Rexel leadership.

**CU size.** The size of a CU is measured by the learner population size and staff size (Abel, 2008). The Learning Management System (LMS) indicates the learner population is approximately 1,240 employees. This is also confirmed in the document "Platt University Organizational Chart – 2015" (See Appendix E). The next sub-factor was size of CU staff. This same chart listed two full-time educational staff members, one in the role of "Director of Education" and one in the role of "Instructional Designer." This document also revealed that approximately 40 company leaders, who held roles of Officers, Department Heads, Division Managers, Sales Managers, and Branch Managers volunteered to teach in the CU on a part-time schedule. (See Appendix E). One interviewee said, "So when I got here, we had 800 employees, and basically two people running the university. Today we have 1,200 people, and basically two people running the university" (Greg).

Finally, 40 company leaders volunteer as part-time instructors in Platt University under the "leaders-as-teachers" program. This program will be described in greater detail

in theme #3 where it was identified as a potential new fifth profile that will be added to Abel's conceptual framework.

***CU years of existence.*** This CU has been in operation for more than 27 years. Platt Electric Supply began electrical wholesale operations in 1953 and Platt University began training employees in 1988. Research did locate an original university crest that indicates the CU originated in 1988 (See Appendix F). The significance of the number of years of CU operations at Platt is how the university continues to impact company culture and business results. Platt University provides the framework for learning. "Six years ago the average Platt employee in one year would take about five courses. Today the average Platt employee takes about 120 courses" (Gabe). "And it [Platt University] energizes our people, and it's a big reason for our success" (Greg).

***Operational profile.*** This conceptual profile describes the CU's operations. The operational profile consists of two factors (Abel 2008): (a) financing sources, and (b) technology usage and implementation. The case will be discussed below in terms of these two factors.

***Financing sources.*** Abel (2008) identified four sub-factors within the factor of financing sources as: (a) corporate budget model, (b) charge-backs to business units model, (c) pay-for-service model, and (d) self-funded profit/loss model. The following will describe the financing sources used in the present case.

Concerning funding, this CU operates using the corporate budget model. This model requires that the CU submits an annual budget to the Chief Financial Officer (CFO) regarding operating costs. The independent researcher confirmed this in a

research interview with one of the governing board members. "...Platt University has a budget" (Garrett).

Research on this case also revealed that a portion of funding for this particular CU is provided by vendors. This new operational factor is titled the "vendor funding model." In this model vendors provide funding for course development and cash incentives to employees for learning about new products. These cash incentives are called "BlueBucks." "Platt awards "Platt [Blue] bucks" for learning about new products (Evan), and another interviewee said, "Blue Bucks are an important incentive. . ." (Erica). One interviewee stated, "Platt U also works with program directors and vendors to create training on new products so we can sell them to our customers" (Elias). In this type of partnership, vendor support helped create a sustainable financing method. The vendor funding model will be discussed in greater detail in theme #3 where it will be added as a new operational factor to Abel's conceptual framework.

***Technology usage and implementation.*** Two sub-factors describe technology use according to Abel (2008): (a) the CU uses comprehensive LMS to manage and track the learning function; and (b) the CU supports leaning delivery through technology. Concerning the first sub-factor, Platt University has used the BlueVolt learning management system (LMS) since 2004. One interviewee stated, "Platt uses an LMS to have their employees register for classroom training" (Vanessa), and "The LMS provides the ability for Platt to build, deliver, and track online courses" (Valerie). BlueVolt LMS is headquartered in Portland, Oregon and began operations in 2004; it provides administrative services to over 120 CUs in the United States and globally. The LMS allows company employees to enroll for both courses offered online on and in the

classroom. The LMS gives employees 24/7 access to over 1,150 courses and archived webinars. The online course catalog includes leadership management, sales, product, safety, technical, and operational training (See Appendix G).

Concerning the second sub-factor, that the CU supports learning delivery through technology, the independent researcher provided an interview statement and examples from two classroom observations that described the variety of technology used in Platt University. One interviewee stated, “Last year we spent. . . about 25,000 hours of it [training] . . .online . . . So it's a big deal” (Greg). Another interviewee said, “There is a mixture of course presentation styles, some PowerPoint, some video, and some podcast so I like that there is a good mixture” (Eric). Concerning technology use in the classroom, the independent observer reported that there was a “Wireless portable microphone that the opening speaker used . . . the technology worked” (Classroom observation BASE-1, p.1). Another observation was that “computer at the back of the room must have been where the soundtrack and movies were initiated by one of the assistant instructors. All technology was well managed and timely” (Classroom Observation BASE-1, p.8). A third observation indicated: “... in the back of the room with three satellite tables where teaching assistants can work, run computer technology, and observe the class. All equipment seems new. The room is immaculate” (Classroom observation BASE-2, p.1). A fourth observation noted: “Customer service lesson employed clicker technology to poll each small group, tally answers on the screen in front, and stimulate discussion” (Classroom observation BASE-2, p.1). A final observation:

A computer lab with approximately 18 stations is equipped with the same technology as in the Branch environment, loaded with the Platt website and the

AS400 inventory management software. Chairs, desks, lighting seem comfortable, well maintained and professional. (Classroom observation BASE-2, p.1).

In addition, Platt TV used modern video recording software and multiple cameras to create both live and archived product training webinars.

**Learning delivery profile.** This profile describes the CU's learning delivery process (Abel, 2008). The learning delivery profile has three factors (Abel, 2008). They are: (a) curriculum offerings, (b) learner population, and (c) evaluation and measurement. Each of these factors is discussed below.

**Curriculum offerings.** There are four sub-factors (Abel, 2008) within this factor: (a) the CU provides skill-based and or job-based programs customized for business units; (b) the CU provides competency-based curricula for entry-level employee learning; (c) the CU provides competency-based curricula for executive level leadership development; and (d) the CU offers programs on developing common vision, culture, and citizenship. The sub-factors are described in relation to the present case.

**Skill-based training.** These are job-based programs customized for specific business units. Evidence was found in an organizational document titled the On-Course Training Matrix (see Appendix H). The On-course Training Matrix lists each branch role in ascending order from the entry level warehouse position to the advanced regional product specialist position. Each position has corresponding product and operational skills necessary for this role. Both employees and their supervisors use the On-Course Training Matrix as a framework to follow in the employees' development process.

The next employee development job-aid is the training track. Training tracks contain a number of required classes, online courses, and workplace activities to help



employees learn the necessary product knowledge and or operational skills needed to fulfill a specific job role or responsibility. Training tracks can either be product related or job related. One example concerning the product track is the solar level-1 training track, which provides a series of introductory courses on solar basics for the newer employee. One example of a job-related training track is the assistant manager training track, which provides a series of classes, online courses, and workplace activities to help designated employees learn the necessary skills needed in the assistant manager role. Employees can self-enroll in training tracks that they and their supervisor have determined will meet their personal development needs as well as the needs of the company. Both internal business unit leaders and external vendors support the use of training tracks as they help drive product sales.

I'm enrolled in probably seven or eight training tracks right now myself. ... It's the beginning piece of the very basics of our product orientation. What are the most common SKU's [products] that a customer is buying? And what do they look like? And what is their purpose, and how are they used? ... Product training with online classes and webinars. Again, training tracks are really important . . . (Greg).

"My supervisor has asked me to attend distribution gear training with Cutler Hammer our vendor partner" (Eaton). "What do you want to accomplish here at Platt? What direction do you want to go? What training track do we need you to be looking at to accomplish your goal?" (Elden). "I like how we have training tracks so if you want to go in a certain direction you can" (Eugene). Many Platt employees have experienced the benefits of active participation in CU programs to develop their industry knowledge and improve their skills.

*Entry-level training for new employees.* Written evidence was found that described the Platt Required Training Tracks containing the 90, 180, and 360 Day

courses listed in the Platt University online catalog (See Appendix G). On the first day of work the new branch employee must complete 12 online safety related courses that require three hours of training time before beginning his/her assigned duties. Next, new employees begin working on a series of training tracks that must be completed in 90, 180, and 360 day increments. At the end of the first year, the new employee has completed approximately 82 online courses and associated quizzes, providing them with important information concerning the company's mission, strategies, core values, and safety focus. "...We have a very structured first year of employee orientation, so we have a curriculum that we call the 90, 180, 360 which are training tracks for the first 90 days, the first 180 days, and the first 360 days that an employee is with us. It covers the basics" (Greg). The independent researcher also found supporting evidence that the CU helped new employees with no industry experience gain important business knowledge to be successful in their career. "I had no electrical experience so it [Platt University] helped me to get educated and up to speed in the Industry" (Eli). And, "I take the online classes. So it helped me. I came from outside of the industry and knew very little" (Greg).

*Executive level training.* Platt has two leadership development programs, LEAD and PACE. LEAD is an acronym that stands for "Learn, Experience, Achieve, and Do." Employees who want to advance to management or sales roles within the organization must successfully complete the LEAD-1 and then LEAD-2 programs. LEAD-1 is 90 days and requires participants to complete a series of operational field assignments demonstrating their mastery of operational skills. Upon successful completion of LEAD-1 graduates can apply for enrollment in LEAD-2. LEAD-2 is 90 days and requires participants to complete a series of field sales and quotations assignments demonstrating

mastery of selling skills. Upon successful completion of LEAD-2, graduates can apply to PACE.

The independent researcher found evidence of employee participation in the LEAD program. “Platt University plays a critical role in career tracking and developing leaders” (Garrett). Elias stated, “...Having LEAD-1 and LEAD-2 as part of their development plan has really helped....” And, “...I tell them that . . . LEAD-1 is the first step. I have completed . . . LEAD-1 & 2 . . . training classes” (Everett).

PACE is an acronym for “Platt, Accelerated, Career, Enhancement.” Employees who desire to advance to a corporate, regional, or branch leadership roles must successfully complete the PACE program. The PACE program is six months in and requires participants to complete sales and management field assignments successfully, and to complete the Toastmasters Competent Communicator certification. The final course project is to make a presentation to company officers demonstrating how their project improved sales and customer relations within their branch or region.

The independent researcher found evidence concerning the role that the PACE program plays within the organization. From the perspective of the Governing Board, “It is critical that we can grow our waves of leaders at Platt ...and I have a very simple [PACE] mission. That is to create passionate leaders. ... So, through PACE and other leadership opportunities we have at Platt, there's a lot of opportunities out there for people” (Garrett). And, from the employee perspective, “I completed the highest level of training that Platt University has to offer which is our PACE program” (Emily). “I loved going to the PACE program, that was my favorite” (Erica, p.3). “PACE requires a good 500 extra hours of work on top of what you are already doing, if not more” (Erica), and

finally, “Completing the PACE leadership program accelerated my career by five years” (Eaton). A review of company documents revealed a listing all of the PACE program graduates and their current leadership roles within the organization. PACE provides the leadership development needs within the organization. (See Table 2).

In 2012, the company President established a business leadership program called BootCamp. BootCamp is a day-and-a-half in length and is taught in a classroom setting at Platt University. This interactive workshop is led by the company president and his executive leadership team. Each class has up to 40 participants who learn how to write a branch mission and develop necessary strategies to achieve sales and service goals they set for their branch. Before participants leave the class, they present their branch mission and strategies and how they will personally contribute to the branches success to company leadership. They return every year for a follow-up meeting describing their progress and setting new goals. As a result of this training Platt people appear more engaged in business activities and the company has experienced a 40% growth in revenue. “Platt U plays a critical role in career tracking and developing leaders” (Garrett).

*Common vision, culture, and citizenship.* Written evidence was found on the third strategy of the CU mission to advance company culture, values, and global priorities of Platt/Rexel. The independent researcher found supporting evidence during a number of employee interviews that culture and values are taught to new employees beginning on the first day of work. One governing board member said, “Day one is safety. So any new employee sits down with the safety curriculum, but it talks about a lot of things. It talks about our history. It talks about procedures. It talks about process. It talks about

culture and values” (Greg). Another interviewee, an employee, stated that, “The 90, 180, and 365 Day courses - [ask] 1,000 questions about our culture and core values” (Eli). Finally, from another governing board member, “We [Platt U] support our Platt [Electric] Mission of becoming the number one distributor in the USA by 2018. So, one of our core competencies/core values is continuous education, so all of our folks at Platt have ... kind of the DNA” (Garrett).

***Learner population.*** Abel (2008) described this subfactor as the CU creating training programs targeted toward specific employee groups. Greg, a governing board member, stated

...we get most of our employees, applicants as a result of a referral. So often times, we will have employees, parents of employees, vendors, customers that look at what we do with the university and they'll recommend somebody come here to go to work for us because of our commitment to education.

The core competencies are used in the recruitment process to attract prospective employees who have a similar values system. They are also used to help managers evaluate applicants in the interview process, measure employees' job performance and organizational fit. Platt has committed to a model of hiring people with core values over people with product knowledge only. Platt's employee development process is to hire promotable people in entry-level positions and to grow them organically. As stated by Garrett, a governing board member, “Making sure that all the new folks that come aboard are core competency / core value people.” Continual learning is an important value at Platt as 100% of the organization's population participates in the workplace learning process.

As the company has grown, so has the number of training courses. The business unit managers have seen a significant increase in product sales as our people continue to

learn. Several interviewees described how Platt University creates product training to provide helpful product information to customers. Thus, a governing board member stated, “Platt U works with program directors and vendors to create training on new products so we can sell them to our customers” (Gabe). And, an employee said, “Learning about products helps me select the right products for the customer” (Eric).

Table 3 lists the current job titles and number of Platt employees in each role. This CU fills a critical role in the employee development process. Working directly with the executive team, the University’s director plans for the development of employees to address future staffing needs. As Greg stated:

We’re always thinking about our bench. The single largest constraint for us to grow is our people, and having enough people to be able to step into the roles, so we’re thinking about it all the time. Who’s on our bench who can step in?

Table 4 represents the current ethnic and gender diversity within Platt’s workforce. One example of the importance of the CU for seeking diversity information from HR is that the CU provides training programs that meet the growing Spanish language needs within the company.

Concerning safety training, we took a look at ethnicity as it relates to injuries in the business in the business, and we found that if you identified yourself as Hispanic or Latino, you ran higher risk of being injured. And I think that some of it had to do with the way we were communicating our safety message, and we simply need to communicate in their native language (Greg).

Thus, Platt University, working in coordination with the parent company Rexel, released the first Spanish language version of the company’s online safety program.

The company has also acknowledged its growing Spanish language customer-base. Greg stated, “As more and more of our employees and customers have English as a second language, we need to communicate with them in their native language.” To

address this specific customer service need the company has developed two Spanish speaking customer service pods that exist to serve the Spanish language customers on the phone. Finally, this CU has addressed individual employee requests to learn Spanish or English by providing either a one-year or three-year subscription to Rosetta Stone's online training program. In addition, the company provides tuition reimbursement for both Spanish and English language courses at the community college level.

Table 5 lists the number of Platt employees and their respective generations. Knowing the different generations working at Platt helps the University prepare training programs to meet future staffing needs. Some industries have anticipated that as much as 50% of their workforce will be eligible for retirement in the next five to 10 years (Schroeder, 2015). This could mean a significant loss of institutional knowledge and potential harm to the organization. This same author described the value of "transitioning mature workers into teaching roles, which benefit both the employee and employer" (p.20). The company currently has several mature workers teaching classes in Platt University.

Table 6 lists the self-reported educational level of Platt Employees. This information is important in the company's succession planning process. Platt leadership is proactively seeking to increase the educational levels of its future leaders. This information helps senior leadership and the CU organize degree completion programs for company leaders who desire to earn a college degree in preparation for advancement within the organization. This CU is currently assisting several managers and company officers in a process to help them complete their Bachelor's degree, MBA, and specialized certifications.

***Evaluation and measurement.*** The five sub-factors of evaluation and measurement (Abel, 2008) are: (a) the CU evaluates learning with reaction questionnaires, (b) the CU evaluates learning by measuring and testing of knowledge and skills, (c) the CU evaluates transfer of learning to job role or task, (d) the CU evaluates organizational results/impact to the business units, and (e) the CU evaluates learning programs by measuring Return-on-Investment (ROI).

All training at Platt University is measured using Kirkpatrick's four levels of evaluation (Kirkpatrick & Kirkpatrick, 2006). They are: (a) level one – reaction, (b) level two – learning, (c) level three – behavior, and (d) level four – results

A level one evaluation seeks to discover participants' reactions through their thoughts, feelings, and perceptions. Participants are asked to complete an online course evaluation. The evaluation contains five questions. They are:

- What is the one thing you will do differently because of this course?
- What did you like least about this course?
- What did you like most about this course?
- Would you recommend this course to others?
- What changes or improvements would you suggest?

Responses to the evaluation are recorded in the LMS and course instructors' review, and changes to course are made accordingly.

A level-two evaluation is used to measure participant learning through testing. This is accomplished by requiring course participants to successfully complete an online quiz. Online quizzes are designed as multiple choice, forced choice (true or false), click and drag matching interactivity, or essay. Learners are allowed to refer-back to training



materials, job-aids, and notes taken in class to complete the test. Testing can also be measured through a demonstration of skills such as completing a forklift driving test.

A level-three evaluation focuses on how learning was translated into behavior changes back on the job. At Platt University level-three change is measured by asking the class participant to self-report within 30 days using the company's LMS and provide a written example to the following question. "Describe one action you have taken to improve customer service since returning to work." This question is from the BASE-1 Customer Service class.

Finally, level-four evaluations seek to determine the results of training or the amount of impact training has had on the organizations bottom-line. Level-four evaluations can be measured by assessing the amount of increases in productivity, reduction in expenses, or increases in sales as a result of training. Platt University measures level-four by asking two questions to seek specific quantifiable information.

- How has completion of this course helped you reduce expenses? (Provide a specific dollar amount)
- How has completion of this course helped you increase sales? (Provide a specific dollar amount)

The information gained in the level-four evaluation will establish a benchmark to compare the cost of training to the increase in sales or reduction of expense. It is important to provide quantifiable results of training to senior leadership of the company.

The final level of measurement was expanded by Philips (2008) where he described the importance of measuring return on investment (ROI). ROI compares the financial benefits of the training program to the costs of development and delivery of the

program. Knowing ROI helps the organization make informed decisions. Phillips and Phillips (2015a) described the importance of workplace educators describing the value of training “by converting data into money” (p.16).

The independent researcher found evidence of Kirkpatrick four levels of measurement during the interview sessions. Concerning the level one – reaction one employee and instructor said, “We’ve [Instructors] done a really good job of being receptive to what the students want based on their feedback” (Evan). “...We [Instructors] are challenged to keep it [learning] fresh, to bring new ideas ... to look at student evaluations” (Earnest). Concerning level two – learning by testing, the same interviewee said, “We [Instructors] use tests and quizzes to drive home important concepts” (Earnest). Another interviewee, a vendor, stated, “I develop five quiz questions for the webinar that must be successfully answered to pass the course” (Vance).

Concerning level three – behavior change back on the job, one interviewee said,

Participants complete a measureable post-class assignment using skills learned in class, and...they [class participants] will go back and have a two week assignment on what they have learned in class ...[helping] customers install the Platt App ....calling inactive customers to increase sales. (Ed).

Concerning level four results and impact on business one interviewee said, “So they [class participants] have ....a measurable task to either increase sales or increase customer service...” (Ed). One interviewee summed up the value of training as selling more products to customers, “The greater the knowledge, the greater number of products that we can sell to our customers” (Greg).

Finally, concerning the fifth level of measurement, Return-on-Investment, (ROI), this particular CU is beginning to develop an ROI measurement process and has no supporting documentation yet to present for this study.

**Partnership profile.** This conceptual profile (Abel, 2008) describes the CU's partnerships with stakeholders both inside and outside of the organization. The partnership profile consists of four operational factors. They are: (a) partnerships with business units, (b) human resources, (c) academia, and (d) outsourcing.

***Partnerships with business units.*** The CU works with line managers to determine requirements and design learning programs (Abel, 2008). The independent researcher found evidence of successful partnerships with business units during the interview process.

Evan, the division manager, said:

So I have roughly 93 classes that we've built within Platt University to help educate our counter sales people, our inside sales people our warehouse people, our assistant managers, managers, anyone of those people can go and take anyone of these courses at any time they like. So it's a great way to educate our people of how to sell tools. ... The only way we we're going to sell those tools is if our employees are aware of them. ... Division managers help vendors build online product training courses and quizzes to ensure quality control.

An employee stated, "Webinars are nice because you can see the product right there..."

(Emily). "In the past I helped teach BASE classes. Now, I help develop tool training webinars ... we sell what we know" (Evan). Finally Evan said that "[he] helps vendors develop tool webinars for online training."

***Partnerships with human resources.*** The three HR sub-factors (Abel 2008) are: (a) the CU partners with HR to analyze employee development needs and new learning programs, (b) the CU partners with HR to develop reward system that recognize employee learning accomplishments, and (c) the CU creates learning programs that align with the HR performance appraisal process. These sub-factors are described below.

*HR analyzes employee development needs.* During research, written documentation was found in the “Success Factors” annual review process. Success Factors is an outsourced HR development vendor contracted by the CU’s parent company, Rexel. The Success Factors program consists of an electronic database that documents the employee evaluation process. This annual review requires each employee to work directly with his/her supervisor to develop a written improvement plan that is specific and measurable. This development plan is then uploaded into the success factors online database where employees and their supervisors can review their past accomplishments as well as review and approve the new goals to be undertaken in the next year.

Next, the independent researcher found evidence during the interview process that confirmed employee development plans. “[CU] Development of skills and core competencies of all employee levels ... also provide actual training paths and career paths for people” (Valerie). One of the governing board members stated, “[Our classes are] providing them [Platt employees] with the tools to advance” (Greg). Finally, "I feel like this [Platt University] helps my career" (Eric).

*CU partners with HR to develop a reward system to recognize employee learning accomplishments.* Instead of partnering with HR to develop a reward and recognition system, the independent research found that this CU partners with the Sales and Marketing department to recognize employee learning accomplishments. “Branches track metrics using scorecards...and post them on the branch walls and at corporate” (Valerie). The next-level recognition for learning achievements is the Branch Educational Award. Each year the Sales and Marketing department works with the CU

to review training accomplishment and awards certificates to branches and departments for course completions and educational achievements.

*CU creates learning programs that align with the HR performance appraisal process.* The interviews supplied a rich source of information. One interviewee said, “I found the performance management [training] helpful” (Elias). “They [Platt U] are constantly developing on-line modules to help further our career and help further our knowledge and skill development” (Eaton). “So it’s been really helpful to me in terms of learning the products, learning the industry” (Greg). “The purpose [Platt University] is to create a culture of learning that supports Platt’s current culture to bring people up throughout the organization, provide training on systems and process and provide actual training paths and career paths for people” (Valerie). “The university exists to help .... [Employees] learn our industry quickly” (Gabe).

***Partnerships with academia.*** The four sub-factors of academic partnerships (Abel, 2008) include: (a) the CU grants accredited degrees, (b) the CU partners with academic universities for credit / or degree programs, (c) the CU partners with academic universities for customized design and/or delivery of non-credit programs, and (d) the CU partners with academic universities for faculty exchange and /or development programs. These are discussed below.

*CU grants accredited degrees.* This CU does not award college degrees. However this CU does award college credit for workplace training. A partnership with a local community college makes this awarding of credit possible.

*CU partners with an academic university.* Platt University has formed a strategic partnership with Clackamas Community College instead of an academic university as

described in Abel's (2008) research. The independent researcher interviewed a Clackamas Community administrator and received the following comments. "We [Clackamas Community College] credential several Platt courses for the purpose of awarding college credit to their employees" (Vanessa). Concerning the third sub-factor, the CU has partnered with the community college to deliver credit programs instead of non-credit programs. One deciding factor for partnering with Clackamas Community College was their agreement to award college credit for Platt U courses. Customized Training and Development Services at the community college reviewed Platt U curriculum and matched them to similar college classes to award transferable credit. Platt University has also given Clackamas Community College online administrative access to the company's LMS. This allows the college to review course curriculum, test results, and participant evaluations. The community college does not design custom courses for Platt University.

*CU partners with academic universities for faculty exchange and /or development programs.* This CU has not partnered with universities for faculty exchange or development programs. However, Platt University Instructors have been invited by local academic universities, community colleges, and high schools to be guest presenters. Platt University encourages its Instructors to use the company's tuition reimbursement program in their personal development.

***Partnerships with outsourcing.*** The three sub-factors of partnerships and outsourcing (Abel 2008) are: (a) the CU outsources the design and delivery of classroom-based programs to external vendors, suppliers, and consultants, (b) the CU outsources various online learning programs to online learning vendors, suppliers, and consultants,

and (c) the CU outsources infrastructure technology needs to external vendors and suppliers. The three sub-factors are presented below.

*CU outsources the design and delivery of classroom-based training.* This CU outsources one portion of its advanced BASE sales training program to a professional sales trainer. This was confirmed during the interview process. “I helped design the curriculum” (Vance). “I present selling skills training at BASE-4 and 5” (Vance). “I describe necessary skills for effective selling – how to dress and conduct yourself” (Vance). Vance also described that he teaches participants, “How to listen and how to ask questions using open probes.”

*CU outsources various online learning programs to outside vendors, suppliers, and consultants.* This CU has a full-time Instructional Designer on staff who develops 80% of the online course content used in the workplace. This CU operates within an electrical wholesaler; the wholesaler sells products from hundreds of manufactures, and these manufactures provide both funding and technical assistance in creating online product training courses. This is an example of the vendor funding model. The vendor funding model will be discussed in more detail in theme #3.

*CU outsources infrastructure of technology needs to outside vendors.* This CU has outsourced the learning management system (LMS) to BlueVolt Learning Management Company of Portland, Oregon. BlueVolt provides cloud-based LMS services to each of Platt’s 123 branch locations in nine Western states. BlueVolt provides LMS services to over 120 corporate universities and workplace leaning academies. Platt University has had a 12 year partnership with BlueVolt. “They [Platt University] are on the [LMS] version that was released 12 years ago” (Valerie). The LMS documents and

tracks employee learning progress and gave supervisor's access to their learner transcripts for employee development planning. Finally, the LMS provides our employees with immediate access to quality online courses.

## **Theme #2: Factors Not Consistent with Abel's conceptual framework for Defining CUs**

This section will examine four areas of operations that this CU was not consistent with in Abel's (2008) conceptual framework. They are: (a) the sales revenue model, (b) partnerships with community colleges, (c) partnership with sales and marketing, and (d) the tuition reimbursement model.

**Sales revenue model.** Strong evidence was revealed from the interviews that this particular CU's training program has helped make direct contributions to organizational selling efforts. "Platt U works with program directors and vendors to create training on new products so we can sell them to our customers" (Elias). "I see them [employees] using their selling skills to sell more product" (Vance). "We have training webinars associated with the role-out of the lighting magazine - so we can learn about the products we are selling" (Elden). "...Develop[ing] our people also assists with a number of our other strategies specifically selling more material" (Greg). "Manufacturers have tons of training on Platt University. . . [and this] gives us the confidence to know what we sell" (Garrett). "You really can't sell stuff if you don't know what it is . . . everybody is a sales person . . . so the more you know the more effective you can be. . . contributing to the goal of getting a bigger market share" (Elden). "For us [Platt] there is a direct correlation between the financial performance of one of our branches and the number of SKU's [products] that they are able to sell" (Greg), "The university teaches our



employees about the products we sell” (Greg). “The university is part of our business strategy, it's not a department. It's part of our culture” (Gabe). Finally, “we sell what we know ... in our industry, you need to be proactive, and you need to sell things. So, in order to sell things you need to create that demand, so you have to have well trained people” (Greg).

**Partnerships with community colleges.** Abel’s (2008) academic partnership profile described CUs as forming partnerships with universities. However, this particular CU has formed a strategic partnership with Clackamas Community College. “We [Clackamas Community College] credential several Platt courses for the purpose of awarding college credit to their employees. ... Employees can earn from 1-3 college credits for completing Platt University workplace courses” (Vanessa).

As an example, Vanessa went on to report the following:

[Clackamas Community College] recently worked together [with Platt U] to fulfill an employee request to expand customer service class credits from one to three credits. The learner completed a 30 hour work/study at 10 hours per credit (Vanessa).

The employee used these partnership credits to help complete a Bachelor’s Degree at BYU Idaho.

Company employees can earn one college credit for every 10 hours of class time, commonly called, seat-time, they attend at Platt University. This academic partnership allows Platt employees to earn up to 14 lower-division Professional/Technical College credits at the 100 level and above. These credits are transferable and are awarded to class participants who successfully complete all assignments. Requesting credit is voluntary and not a requirement of the CU. Classes offering credit are: (a) the Branch Advantage Sales Education classes (BASE-1 thru 5 for sales training) and (b) the Performance

Management Training (PMT) class for newly appointed managers and assistant managers to help them learn the basics of employment law and company policy needed for their role. Since 2009, Clackamas Community College has awarded 932 lower division college credits to Platt employees for successfully completing training courses conducted in Platt University. (See Table 7).

The numbers for 2015 are low as they only include requests for the first half of 2015. However, a significant decline began in early 2014 for the BASE-1 customer service class. During that year, a change was introduced requiring a three hour work assignment that must be documented to earn credit. The assignment has four options, must have managers approval, and be completed within 30 days of attending class. The four options are:

- Find new customers
  - Call or visit potential customers in your area
  - Open new accounts (cash or credit)
- Increase order frequency
  - Call customers with declining sales or zero sales
  - Help customers download the PlattApp
- Expand SKUs sold (Stock keeping items or products)
  - Demonstrate new product to customers
- Develop new product knowledge
  - Complete additional product training

A closer examination of these work assignments has revealed some possible barriers to completion.

- Most employees who attend BASE-1 are new to Platt and working in operational roles as warehouse or driver.
- These assignments are sales-based and may not fit within an operational setting.
- Participants may not have the necessary skills or experience to accomplish these training tasks.
- Four choices may be too many.
- The time frame to complete the assignment may be too short at 30 days.
- Completing this assignment may take the participant from his/her regular duties

The CU and class instructors may need to consider modifying this assignment.

**Partnership with sales and marketing.** In Abel's (2008) research, the Human Resources department was described as the one to partner most often with CUs in the development of a recognition system to promote employee learning accomplishments. However, this particular CU has partnered with the Sales and Marketing Department to recognize employee learning accomplishments. Each month the Sales and Marketing department sends out report cards to each branch and department location. Report cards list the mission and strategies of the branch or department. They list goals achieved in business activities such as the number of active customers, number of new customers added, and percentage of order fill rates; furthermore, the last measurement is the number of course completed during the month.

The first example of company recognition for learning accomplishments is the monthly distribution of the branch or department "Report Cards." Each month, the Sales

and Marketing department sends a report card showing a list of operational, service, and learning activities completed by each branch, department, and or division. The report card acts as a monthly recognition and measurement of key business actives completed in the last 30 days. Valerie stated:

And out of those metrics, they've developed things like scorecards . . . they post those on the . . . branch walls, they post them at corporate and they measure things like customer service, number of rings before people pick up. So there's a number of different things that they are using the LMS for and that the platform supports from a training and development perspective.

The LMS allows Department and Divisions to manage their own metrics and reinforces the organization's learning culture. Garrett indicated that, "All of us have report cards, and part of that is training with our vendors." Finally, each year the Sales and Marketing Department selects and awards the Education Branch of the Year for branch type. In 2014, seven branches received awards.

**Tuition reimbursement model.** Tuition reimbursement was not mentioned in Abel's (2008) profiles or factors. However, this CU has identified tuition reimbursement as a tactical expenditure within the employee development process. Company documents describe that tuition reimbursement is provided as an employee benefit. The company offers up to \$4,000 annually and \$10,000 as a total lifetime benefit. Organizations can choose to reimburse up to \$5,250 per year, which is the ceiling that the federal government allows for tuition benefit expenditures to be exempted from withholding tax. To be eligible for tuition reimbursement the employee must describe how the college class is work related and will benefit both themselves and the organization. All requests must be pre-approved by the participant's Department Head, Director of Education, and VP of Human Resources (HR). The participant is limited to two classes per term. The

class can be online or in the classroom. The company reimburses for tuition, books, and parking fees. A grade of A or B is reimbursed at 100%, a grade of C at 50%, and a grade of D or below at 0%. The company requires proof of grade, such as transcript and all copies of paid receipts for tuition, books, and parking fees.

Platt's tactical use of tuition reimbursement directs employees to take their classes at the community college level with a focus on an Associate Transfer Degree that they can move to a four-year college. This strategic use of tuition reimbursement dollars provides the best value to the company and allows more employees access to this benefit. At this time all graduate level classes must be pre-approved by the company's President/CEO.

Since 2003, 77 employees have utilized tuition reimbursement benefit. Of this number, two have completed an Associate Transfer degree, eight have completed a Bachelor's degree, two have completed a graduate degree, and three have completed professional certifications. The total dollars reimbursed since 2003 is \$98,917.37. The offer of tuition reimbursement is an important benefit to those being recruited as well as an important tool in retention efforts. Employees that request and receive tuition reimbursement must extend their employment to the organization for an additional 24 months or repay the reimbursed amount.

### **Theme #3: New Profiles and Factors**

This section will examine one new profile and five new operational factors identified in this study when compared to Abel's (2008) conceptual framework. The one new profile is (a) the leaders-as-teachers profile. The five new operational factors are: (a) partnerships with vendors, (b) partnerships with outside organizations, (c) use of course

prerequisites, (d) timing of required training and (e) the integrated systems model. These are described below.

**Leaders as teachers.** This research project discovered a possible fifth profile, the Leaders-as-Teacher's profile. This fifth profile interacts naturally with the other four profiles and has demonstrated transformation of the original conceptual framework into a true learning system.

The leaders-as-teachers concept was evidenced the interview process. "So all the leadership program here is taught by Platt leaders, and they consider it an honor to be asked. Anybody that's asked to participate as a BASE instructor, a PACE instructor, a LEAD mentor, a PACE mentor, they are so flattered" (Greg).

One participant valued the opportunity to listen to Platt leaders who teach classes because they gain helpful and practical knowledge. "...listening to our Instructor and their real-life situations..." (Emily). An instructor stated, "As a teacher, I help people" (Earnest); and another said, "I participate in our LEAD program, our PACE program, BootCamp as an Instructor" (Greg). "Well, I love doing it [teaching], I love connecting with people [and] feel that I have somethings to help them improve..." (Earnest). One employee noted:

...another element that we do a Platt University. . . is have someone from the executive team come to class ... not there to talk to them, they are there to say does anybody have any questions?.... I don't think most employees at most companies get an opportunity to talk to [the] chief executive of 1,000 person plus company. (Ed)

"He [the company president] referred to "seasoned leaders such as ... instructors in the room, validating their credibility to the students" (Classroom Observation BASE-1 p.6).

Since 1988, Platt University has successfully involved leaders-as-teachers and developed Platt Electric Supply into a learning organization (See Appendix E). The former owners of the company required that the university not hire permanent teaching staff, but instead utilize company officers, department heads, division managers, sales managers, and branch managers in part-time teaching roles. This action strengthened the leadership development process at Platt. The CU director used a train-the-trainer model, guiding company leaders to gain helpful skills in adult learning theory and practice. The former owners of Platt, often commented that those they observed teaching in the university had grown to become more knowledgeable about business practices and more confident speakers, presenters, and facilitators. Implementing the leaders-as-teachers program has benefited Platt's employee development process.

The next section describes the five new operational factors identified in this study. These factors are: (a) partnerships with vendors, (b) partnerships with outside organizations, (c) use of course prerequisites, (d) timing for required training, and (f) the integrated systems model.

**Partnerships with vendors.** This is the first of five new operational factors identified in this study. Concerning CU funding models Abel (2008) described four types. They are: (a) corporate budget model, (b) charge-backs to business unit's model, (c) pay for services model, and (d) self-funded Profit/Loss model. This CU operates using a combination of the "Corporate Budget" model, and a new "Vendor Funding" model, with the latter model not mentioned in any academic literature to date. In this model, vendors who sell products through the parent organization of the corporate university underwrite some course development costs for training delivered on the

wholesaler's Learning Management System (LMS). This model benefits the vendor, the parent organization and the organization's corporate university. The organization's employees gain product knowledge that leads to increased product sales for both the vendor and the organization. Vendors discovered that their product sales grew dramatically once they began to provide online training courses to the CU and incentivizing Platt employees directly.

Research on this case also revealed that a portion of funding for this particular CU is provided by vendors. This new operational factor is titled the "vendor funding model." In this model vendors provide funding for course development and cash incentives to employees for learning about new products. At Platt, these cash incentives are called "BlueBucks." One interviewee stated, "Platt awards Platt[Blue]bucks for learning about new products" (Evan), and another interviewee said, "Blue Bucks are an important incentive ..." (Erica). One interviewee stated, "Platt U also works with program directors and vendors to create training on new products so we can sell them to our customers" (Elias). In this type of partnership, vendor support helped create a sustainable financing method.

Interviewees revealed, "And they [Vendors] look at [Platt University] as a real value in terms of doing business with us, . . . "We sell what we know" (Greg). "Platt U works with program directors and vendors to create training on new products so we can sell them to our customers" (Elias). This partnership has created a sustainable financing system that benefits both the organization and the vendor.

**Partnerships with outside organizations.** This is the second of five new operational factors identified in this study. Platt has partnered with Toastmasters



International since 2008. Toastmasters is an international organization that exists to help learners improve their public speaking and leadership skills. At Platt, participation in Toastmasters is a requirement within the company's leadership training programs. During the interview portion of this research project the independent researcher found that Toastmasters was valued by employees who have enrolled in the company leadership programs. "We found that Toastmasters has been a wonderful program for us . . . (Greg), "I took Toastmasters ...just a wonderful experience" (Emily), "...they [Toastmasters] teach things we can't teach ... Toastmasters is consistently good at . . . the evolution and the advancement of our people" (Garrett). Toastmasters is an international organization that exists to help learners improve their public speaking and leadership skills. The Toastmasters International mission on their website states: "We empower individuals to become more effective communicators and leaders."

Toastmasters was founded in 1924 and currently operates in 126 countries with more than 300,000 members. Participants gain practical experience by focusing on two separate training tracks: (a) Communication track titled the Competent Communicator (CC), and (b) leadership track titled the Competent Leader (CL). Participants join a club in their local area and begin working on completing the 10 speeches in the Competent Communicator Workbook. Clubs can be found on their website by typing in an area code. Club sizes ranges from between 10-40 members, with an average of 20 participants, and meets weekly for 1-2 hours. Toastmasters learn by doing. Participants can earn the "competent communicator" designation by successfully completing 10 public speaking projects or speeches. Speeches last between 4-6 minutes and the presenter receives honest and supportive feedback from other club members.

Concerning the leadership track for Toastmasters, participants must complete 10 development activities that improve their leadership skills such as participating in the club meetings as a speech evaluator, grammarian, or ah-counter. Leadership skills are further developed by being elected to one of eight leadership roles within the club such as president, VP of education, VP of membership, treasure, or secretary to name a few. Employee members pay a fee of approximately \$40 dollars every six months. The company reimburses employees for this cost. Company leaders have commented that Platt employees gain self-confidence and improve their public speaking ability through Toastmasters training. Both the LEAD and PACE leadership programs utilize Toastmasters to help class participants prepare to give their final speech to our company officers. Toastmasters has become a valued partner for leadership development within the Platt Organization.

**Use of course prerequisites.** The use of course prerequisites represents the third of five new operational factors identified in this study. Within this particular CU, a course completion hierarchy or sequence was identified that requires participants to complete course prerequisites first before advancing to the next level of complexity. This completion sequence optimizes training results by presenting training concepts from simple to complex. Examples of course sequence include the 90, 180, 365 day courses, BASE -1, 2, 3, 4, 5, LEAD-1, 2 and the PACE programs. One interviewee said, "...the university is segmented into 35 different vertical categories-curriculums we call training tracks ...." (Gabe). "So far as the classes though, there is a hierarchy you want to start at the bottom, BASE-1 and then go on to the next BASE class . . ." (Evan). "I have

completed the 90, 180, 360 Day classes, LEAD-1 & 2, P&L training and a number of product training classes” (Everett).

The use of course prerequisites means that employees gain the knowledge and experience necessary before they move to the next higher-level of classes. Platt University has over 1,150 training courses utilizing 66 training tracks. Training tracks consist of a number of online courses, in-person classes, and activities such as Toastmasters speeches. Training tracks are listed as level 1, 2, and 3 with level 3 being the most advanced. The LMS restricts a person from enrolling in the next level class until the prerequisite courses have been successfully completed. This practice has helped reduce learning gaps at work and increase mastery of key topics. Learning gaps occur when employees bypass important introductory information that can keep them from attaining mastery of a topic or concept. Completing prerequisites also ensures that employees who enroll in advanced-level classes are fully prepared to attend training. Not completing course prerequisites can disrupt the classroom when instructors and advanced participants lose focus trying to help other participants learn introductory concepts. Successfully completing prerequisites is an effective way to optimize training costs by ensuring class participants are qualified to attend the class. About 50% of the training at Platt University is delivered online and 50% is delivered in the classroom. Platt University uses the On-Course Training Matrix and a Career Pathway document as road maps to help employee develop critical skills within the organization.

**Timing for required training.** This is the fourth of five new operational factors identified in this study. During the interview portion, the independent researcher received information from several managers and hourly workers that the amount of

required training had increased, and some were struggling to finish during regular working hours. Online and classroom training has steadily grown over the years. One governing board member said, “Last year we spent about 50,000 hours on education for our 1,100 employees about 25,000 hours of it [training] was online and 25,000 was classroom education. So it's a big deal” (Greg). A frontline employee said, “It can take an individual four to five hours to do some of these [courses] and we don't have four to five hours to sit down to and do it [training] within the company time” (Eaton). Erica stated, “I've had to do it [training] sometimes at home, too, just to get caught up...” (Erica). And, “We are a busy branch and it's hard to find time to justify working on courses during the day” (Erica). In some instances hourly, non-exempt employees, are asked to complete product training courses by a division manager in preparation of a large product promotion. For this reason, there needs to be an examination of the number of mandatory courses required for each business unit to complete. Examples of mandatory courses can include safety, communication, new products, and business ethics. The company requires that hourly, non-exempt employees complete these courses during their regular shift or the supervisor can approve overtime if requested. However, salaried, exempt employees can complete required courses on their own time after regular work hours. Current employee job titles were examined and confirmed that as much as 80% of the company's workforce fits into the hourly, non-exempt roles. This information was both concerning and helpful to the researchers and CU director.

**Integrated systems model.** This is the fifth and final operational factor identified in this study. With the addition of the new leaders-as-teachers profile and the five new operational factors, the CU framework now represents an integrated systems

model. This model connects the leaders-as-teachers profile, organizational profile, learning delivery profile, operational profile and, the partnership profile into an integrated system with inputs and outputs. The new model provides an integration of the current research conducted at this particular CU with information from past research. This model incorporates the four profiles from Abel's (2008) work plus the addition of one new profile and four additional factors identified in this research.

### **Summary**

This chapter presented the findings of this study. The following research questions informed this study: (a) what is the history of this CU? And, (b) what are the operational factors associated with this CU? Findings are based on analysis of interview transcripts, and are supported by reviewed documents, observations, and artifacts. Findings were discussed in three parts as the three major themes that emerged from this data.

- Factors that were consistent with Abel's conceptual framework for defining CUs
- Factors that were not consistent with Abel's conceptual framework for defining CUs.
- New profiles and factors.

The complete and revised model of profiles and factors appears in Figure 3. Each of these will be summarized below.

Participants' perceptions and experiences as well as documents and artifacts were used to discover the profiles and operational factors identified in this CU's operations. This initial framework (Abel, 2008) has four profiles. They are: (a) Organizational, (b)

Operational, (c) Learning Delivery, and (d) Partnership. All four of these profiles were confirmed in the current case.

The second theme described four areas that were different within this particular CU and Abel's (2008) conceptual framework. These differences are: (a) sales revenue model, (b) partnerships with community colleges, (c) partnership with sales and marketing, and (d) tuition reimbursement model. First, this CU operates as a strategic member within the organization's selling strategy. Second, Abel's research described how some CUs formed partnerships with universities; however, this particular CU formed an academic partnership with a community college. Third, Abel's research described how CUs often form partnerships with HR to recognize and reward training accomplishment; however, this CU formed a partnership with the Sales and Marketing Department. Finally, Abels' research did not mention the use of tuition reimbursement within CU operations. This research looked at the CU's tactical use of tuition reimbursement in the process of employee development process.

The third theme identified one new profile and five new operational factors. The new profile is (a) the leaders-as-teachers profile. This new profile is an addition to Abel's four profiles. They are: (a) the organizational profile, (b) the learning delivery profile, (c) the operational profile, and (d) the partnership profile. Within Abel's organizational profile there is the addition of the operational factor that (a) integrated systems model. Within Abel's learning delivery profile there are the addition of two new operational factors they are (a) the use of course prerequisites and, (b) timing of required training. Within Abel's operational profile is the addition of the new factor titled the vendor funding model. Within Abel's partnership profile are two operational factors.

They are: (a) partnerships with vendors, and (b) partnerships with outside organizations.

During the research project it became evident that this CU operates within a systems approach to learning. Corporate University frameworks and operational functions do vary. Identification of the new profile and five new factors may help CU administrators evaluate and implement successful operation for their corporate universities.

To this end, Chapter 5 discusses the themes that emerged from this study, and recommends future practice and research.

Table 2

*PACE Graduates since 1992 and their current leadership roles*

Company Role	Number
Regional Vice President	5
Business Development Manager	2
Sales Manager	4
DataComm / DSS Specialist	4
Lamp & Ballast Specialist	3
Branch Manager	67
Assistant Manager	15
Project Support	3
Outside Sales	29
Inside Sales	8
Counter Sales	2
TOTAL	142



Table 3

*Employee job titles as of June 2015*

Title	Number of employees
Executive	10
Manager	168
Professional	50
Sale	470
Administrative	164
Operative	78
Laborer	300
TOTAL	1,240

Table 4

*Employee ethnicity and gender as of June 2015*

	Hispanic	White	Black	Asian	Hawaiian Pacific Islander	Alaskan Native or American Indian	2+ Races	
Male	109	922	26	18	5	5	8	1,093
Female	18	114	5	6	3	1	0	147
TOTAL	127	1,036	31	24	8	5	9	1,240

Table 5

*Platt employees and their respective generations*

Group	Birth Years Inclusive	# of Employees	% of Population
Traditionalist	1925-1945	7	0.01%
Boomers	1946-1964	267	21.0%
Gen X	1965-1980	449	36.0%
Gen Y	1982-2000	517	43.0%
TOTAL		1,240	100%

Table 6

*Self-reported education levels at Platt as of Sept. 2014*

Education Profile	# of Employees
No High School	6
GED	44
HS	422
Associate/Technical/ Trade	142
Bachelors	156
Masters	10
Blank – (not entered by employee)	402
TOTAL	1,182

Table 7

*College credit awarded from 2009-2015*

	BASE-1	BASE-2	BASE-3	BASE-4	BASE-5	PMT
2009	14	6	20	18	3	0
2010	38	21	14	8	11	19
2011	75	52	34	28	14	18
2012	93	33	24	16	10	20
2013	72	33	19	18	23	17
2014	5	45	29	26	22	13
2015	0	9	5	0	6	1
TOTAL	297	199	145	114	89	88

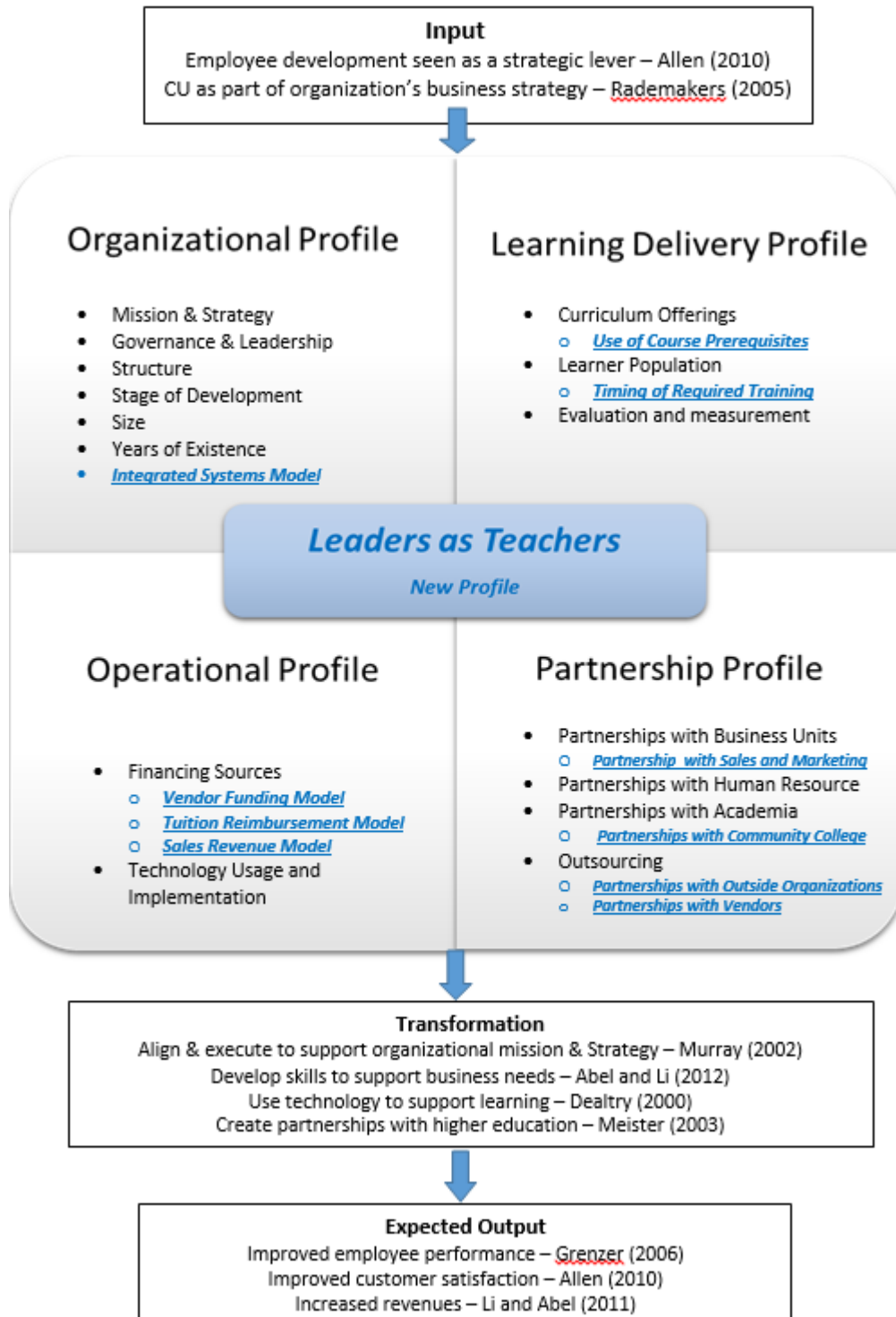


Figure 3. New conceptual framework/model for Corporate Universities.  
(Adapted with permission)

## **Chapter 5: Discussion**

The purpose of this study was to examine a specific electrical wholesale distributor's corporate university's operational factors using Abel's (2008) conceptual framework for defining and classifying corporate universities as a guide to this study. Research was based on the following data sources: observation of the study site, interviews with 18 employees and outsourced vendors, two classroom observations with 44 employee participants, and review of company documents, and artifacts. This chapter reviews, analyzes, and discusses the finding of this study in light of relevant literature. This chapter also outlines the implications of the findings for Human Resource Development (HRD) professional and the potential impact of a CU on employee development efforts. This chapter concludes with suggestions for further research.

Two fundamental questions framed this research:

- What is the history of this particular CU?
- What are the operational factors associated with this particular CU?

The research questions were answered by themes that emerged from observations of the study site, interviews, classroom observations, review of company documents, artifacts and were reported in Chapter 4. The following discussion aligns with Figure 3 presented at the end of Chapter 4.

### **Theme #1: Factors Consistent with Platt University and Abel's Conceptual Framework**

Platt University has been in continual operations for more than 27 years. Platt Electric Supply began electrical wholesale operations in 1953 and Platt University began operations in 1988. The first theme described consistencies with a particular CU and the

four profiles of Abel's (2008) conceptual framework. They are: (a) Organizational, (b) Operational, (c) Learning Delivery, and (d) Partnership. Each of the four profiles is divided into a specific number of operational factors.

These dimensions assist in identifying a corporate university. To varying degrees, all corporate universities exhibit capabilities in any or all dimensions, across the four functional profiles. Some corporate universities may demonstrate greater knowledge and expertise in one or more profile areas, while other corporate universities may demonstrate expertise in multiple dimensions across several profiles (Abel, 2008, p.50).

In general, each of the four profiles were identified as operating within Platt University. The next section discusses factors that are consistent with Abel's conceptual framework and Platt University operations. It also connects these factors with other existing literature.

**Organizational profile.** The organizational profile describes the CU's structure. This profile consists of six operational factors. They are: (a) mission and strategy, (b) governance and leadership, (c) structure, (d) stage of development, (e) size, and (f) years of existence. The research findings and literature will be discussed for each operational factor.

***Mission and strategy.*** This particular CU had published mission and strategies that demonstrate support for the learning and performance efforts within Platt Electric Supply. The CU's mission and strategies guide the company's learning and development efforts. The CU's mission is to develop the organization's people. Corporate universities that do not align well with business needs may only become marginally effective as they have little connection to senior management strategies. "The value and connection to the business must remain the core focus of corporate universities" (Abel, 2008, p. 39).

Grenzer (2006) stated that the most important goal for the corporate university is that it is



aligned with the goals and objectives of the senior leadership. Finally, Betof (2014) stated that a corporate university must align program content with business and organizational strategies.

***Governance and leadership.*** Most corporate universities have a governing body, even if it is only represented by a Chief Executive Officer (CEO) (Wheeler & Clegg, 2005). Platt University's governing board is made up of four leadership roles: (a) President/CEO, (b) Vice President of Human Resources, (c) Vice President of Marketing, (d) and Director of Education. This CU's governing board demonstrated active participation and guidance concerning the organization learning initiatives. Meister (1998) stated that, "In every successful corporate university we have seen, the guiding coalition of board members develops a picture of the future that is relatively easy to communicate and makes a lasting impression on all the key stake holders" (p. 68). Todd (2004) explained that approximately 67% of corporate universities have a governing board. The makeup of these boards is principally senior executives who report to the company CEO. Abel (2008) stated that CUs have a governing board responsible for supporting CU operational and strategic goals and that CUs have a formal chief learning officer or its equivalent leading CU operations, with 20% of the CUs having a director in a leadership position. Platt University is managed by a director-level role.

***CU structure.*** Platt University operates in a centralized structure. Abel (2008) found that 35% of the 210 CUs surveyed had a centralized structure. Meister (1998) said that centralizing CU operations leads to cost efficiencies in areas such as course design, delivery, enrollments, measurements, and vendor management. In addition, Wheeler and Clegg (2005) described the centralized model as being the most effective for

organizations with 2,000 employees or less. Platt University is currently in the process of merging with the larger One Rexel Academy.

***CU stage of development.*** Abel (2008) found that 13% of the 210 CUs surveyed had reached stage four in their development. In stage four, the CU is described as being known for expertise and has received many honorable mentions. Platt University is known for its expertise within the industry as well as higher education. Wheeler and Clegg (2005) said CUs must not just be merely a renamed training department, instead the CU must be known for supporting learning that impacts organizational success. Corporate universities are responsible for developing people and growing organizational capabilities (Allen, 2007, p. 4).

***CU size.*** Two sub-factors describe size (Abel, 2008), learner population size and CU staff size. The current size of Platt University's learning population is 1,240 people. The scope and scale of corporate universities span from the largest enrollment at over 100,000 employees to the smallest at under 500 (Todd, 2004). Grenzer (2006) identified one successful CU within a company of 50 employees. "The size of the organization is clearly not the primary determinate of the eligibility of having a corporate university" (Allen, 2002, p. 11). The current staff size of Platt University is two full-time staff and 40 part-time instructors. In 2008, Abel found that "50% of the 210 CU surveyed had from one to 25 full-time employees" (p. 93).

***CU years of existence.*** Platt University began in 1988 and has been in continual operations for 27 years. In 2008, Abel found that only 6.7% of the 210 CUs surveyed had been in existence for 20 years or more. One reason for Platt University's longevity may be the ability to help the company achieve its strategic business goals. Platt

University fulfills more than an HR on-boarding tool; it is a strategic business partner that helps the organization achieve its strategic objectives. Effective employee on-boarding is important to the organizational success; however, if onboarding were the only mission of the CU, the CU would not be reaching its full potential. Platt University works closely with internal business units to create courses that help the employees sell products. “Corporate universities are linking employee learning to overall company strategy, and as a result corporate universities are becoming the connective tissue of the organization (Fulmer, 2002, p. 107). Wheeler and Clegg (2005) described the enduring success of CUs such as Motorola, McDonald’s, and General Electric’s in their ability to impact organizational goals.

**Operational profile.** This conceptual profile describes the CU’s operations. The operational profile consists of two factors (Abel, 2008). They are: (a) financing sources, and (b) technology usage and implementation. These two factors are described below.

**Financing sources.** Each year, Platt University submits an annual budget to the Chief Financial Officer (CFO) concerning operating costs. Wheeler (2005) described three funding models for corporate universities. They are (a) the corporate allocation model that requires the company to underwrite all training related expenses, (b) the partial or full cost recovery model that requires the CU to charge company departments for the cost incurred for training, and (c) the profit center model that requires the CU to sell all programs to internal or external customers at a profit. Abel (2008) described four funding models. They are: (a) corporate budget model, (b) charge-backs to business unit’s model, (c) pay for services model, and (d) self-funded profit/loss model. Platt University operates using a combination of the “corporate budget model” and a new fifth

type that has been described as a “vendor funding” model. The vendor funding model will be discussed in greater depth in theme #3.

***Technology usage and implementation.*** Platt has made a strategic investment in technology and is known within the electrical wholesale industry for providing the latest PC hardware, software, and phone technology to both employees and customers. The company has developed the Platt.Com website and the PlattNet intranet site as a knowledge management system for product searches and online ordering. The PlattApp provides access to both employees and customers to order, and product information on their smart phones. Companies need to organize their knowledge management process to ensure their competitive advantage (Prince & Beaver, 2002). The company has also invested significantly in classroom as well as e-learning technology. Dealtry (2000) described the importance of e-learning as a way to distribute shared knowledge throughout the organization. Paton, Peters, Storey, and Taylor (2005) found that CU initiatives that use the Internet for training provide less disruption to the daily work schedule. Knowledge management can be undertaken with the implementation of an LMS (Bersin, 2007). Workers are increasingly accessing online self-paced learning instead of waiting to take an in-person training course (Anderson, Hardy, & Leeson, 2008). An LMS provides access to learning 24 hours a day, seven days a week and 365 days a year, and condenses learning time by 50-60% when compared to classroom instruction (Chapman, 2008). Finally, Platt University has 100% employee participation within the company’s online LMS training platform.

**Learning delivery profile.** The learning delivery profile describes the three factors in the CU's learning delivery process (Abel, 2008). They are: (a) curriculum offerings, (b) learner population, and (c) evaluation and measurement.

**Curriculum offerings.** Platt University provides over 1,150 online and classroom-based courses to all company employees. Topics include communications, leadership, management, sales, operations, and product courses. Eurich (1985) described the curriculum of a corporate college classroom as seeking to educate the whole person concerning the industrial, social, economic, and political order. Wiggenshorn (1990) stated that at Motorola University "we try to make our education relevant to the corporation, to the job, and to the individual" (p.81). Dealtry (2003) stated that CUs must focus on providing a worker's training curriculum that must extend between 35 to 45 years during their working careers.

In addition, the curriculum included in CUs has changed over the years. McNamara (2007) identified that the scope of CU training/curriculum had shifted to include a focus on key business, financial, technical, and ethical competencies. Platt University continues to expand its course selections each year. Prince and Stewart (2002) said CUs of the future need to be at the center of the organization leading their knowledge and learning initiatives. Grenzer (2006) said that "...the corporation will need to maintain a competitive advantage over those corporations that don't yet understand how such learning programs generate revenue" (p. 8).

**Entry-level training for new employees.** Platt University has a well-organized new employee training program. The CU allows more flexibility for a continuous learning within the corporate workplace, and it allows more flexibility for employees to

participate in self-learning with the ability to grow from real business problems and develop skills to help the corporation and support the employee's life-long learning process. Todd, Fetterhoff, and Schienken (2013) said, "...it's an imperative for organizations to integrate learning with work ... (p.7). Dealtry (2003) stated that learning is no longer limited to a person's early life but a requirement throughout a person's entire career. Such results correspond with those of El-Tannir (2002) whose qualitative study revealed that the CU model is suitable for continuous learning processes within the corporate workplace. Dealtry (2010) indicated that, "Organic growth dynamics involve the internal development of organizational capabilities and the skills and competencies of its people to make it more efficient" (p.11). Platt follows a promote-from-within development model. Continually developing employees through a corporate university is crucial to the firm's talent development process (Everson, 2014).

*Leadership training for employees.* Platt University has had an active leadership development program since 1990, as described in Chapter 4. Jarvis (2001) stated that corporate universities develop company leaders and improve workplace performance. Meister (1998) said, "These hands-on application-driven programs are based on actual business challenges facing the organization and give participants an opportunity to actively discuss, diagnose, and recommend solutions for real-life business challenges" (p. 15). Fulmer and Bleak (2008) wrote, "Truly, organizations with a strong leader and superior leadership development strategies deliver better result. In short, developing great leaders delivers great results and is a key leading indicator of business success" (p. 168). Thus, the Platt CU appears to be providing the needed leadership development opportunities.

*Common vision, culture, and citizenship for employees.* Written evidence was found in the third strategy of the Platt CU mission and says, “Advance company culture, values, and global priorities of (Platt/Rexel).” Platt’s “core competencies” reflect the company’s shared values and behaviors that all employees need to exhibit. “Managers and leaders need to be trained to consciously manage culture so that the culture drives the desired results” (Connors & Smith, 1999, p. 36). Meister (1998) stressed the importance of all employees participating as corporate citizens, knowing and supporting the company’s culture, values, traditions, and vision. Fulmer (2002) states that, “The corporate university is the logical place and most effective tool for grounding new hires in the corporate culture” (p. 110). Lipp (2013) stated that the mission of Disney University is to make certain that employees understand Disney brand, history, traditions, and values.

*Learner population.* Abel (2008) described this sub-factor as the CU creates training programs targeted toward specific employee groups. Platt University has targeted training programs for all employee groups. The CU director works with senior leadership to address the company’s talent development needs. Meister (1998) stated that CUs are helping employees manage their own careers by providing training to support their current or future positions within the organization. “The corporate university is far more comprehensive than a training and development function and provides, in its ideal incarnation, a talent development process that supplies the organization the talent it needs to meet competitive challenges” (Wheeler & Clegg, 2005, p. 6). “Effective education engenders change” (Clark & Sloan, 1958, p.134). Grenzer (2006) suggested that a CU aids the organization with strategies to meet employee development needs.

“Organizations are increasingly turning to corporate university training to address their ever-growing employee development needs” (Morin & Renaud, 2004, p. 305).

***Evaluation and measurement.*** Platt University finds value in using the Kirkpatrick measurement model to evaluate all training results. Allen’s (1999) qualitative case revealed the use of the Kirkpatrick measurement model for evaluating training. Furthermore, Bober and Bartlett (2004) described how CUs have used the evaluation of training data to improve their training programs. Concerning financial measurements, Platt University produces annual training reports for senior leadership describing the number of courses completed and costs for training. Wheeler and Clegg (2005) said the ultimate determination of success for a CU is if it can demonstrate measurable success. Finally, Phillips and Phillips (2015b) said, “The most valuable metric for CEO’s is business impact, 96 percent want to see this from learning, but only 8 percent see it now” (p.16).

***Partnership profile.*** This conceptual profile describes the CU’s partnerships. The partnership profile consists of four operational factors. They are: (a) partnerships with business units, (b) human resources, (c) academia, and (d) other specialized service providers. “To be successful, corporate universities require the ability to develop and manage multiple relationships, internal and external, in order to successfully meet learning demands. These relationships range from internal partnerships with business leaders and human resources department to outsourcing relationships with external vendors and academic universities” (Abel 2008, p. 38). Platt University has active partnerships with business units, human resources, academia, and specialized service



providers. These partnerships support both the learning functions and business objectives of the company and are discussed below.

***Partnerships with business units.*** The Platt CU actively participates with all Platt business unit leaders to develop training programs that educate the workforce about products the company sells, operational procedures, and how each individual can contribute to the success of the company's mission. Meister (1998) said:

Companies are designing courses that explain to employees how the company makes money; who the customers, suppliers, and competitors are; the best practices of other companies; how the features and benefits of the company's products differ from competitive offerings; and how the employee's job fits into the corporate mission (p. 41-42).

Veldsman (2004) described CUs as focusing on the business needs of the organization. Walton (2005) suggested that one of the purposes of a CU is to provide training that improves operations and impacts to the organizations bottom-line.

***Partnerships with human resources.*** Platt University partners with HR to analyze and plan for the future talent development needs of the organization. It also works closely with HR to ensure increased training capacity is available to meet employees' development needs. At Platt, the CU director reports to the VP of HR. Barley (2002) said the most common place for a CU to reside is in the human resource department. "CUs and HR work together closely to drive employee and organizational development" (Todd, 2004, p. 4). CUs help employees in their career development process. (Wheeler & Clegg, 2005). Furthermore, Grenzer (2006) indicated that CUs must be aligned with HR to help direct the employee development and career path process.

***Partnerships with academia.*** Platt University has formed a strategic partnership with Clackamas Community College instead of an academic university as described in

Abel's research. "One way to expand boundaries of organizations is to form partnerships and then link the information from each individual into common information system that can be used by all the partners" (Schwandt & Marquardt, 2000, p.109). Partnering with CCC has been cost effective for Platt as the college charges only a small fee of \$35 for each credit awarded. Meister (2001) said that two-year community colleges tend to partner more within the wholesale/retail industries and Platt is a wholesale electrical distributor. "...There is a trend toward articulation alliances where the educational institution certifies course content, and the student earns college credit for the work they have done (Todd, 2004, p. 115). The relationship between Platt University and Clackamas Community College is an example of the growing trend of CUs working with academic institutions to develop either non-credit, credit, or degree programs for business employees in the workplace (Li & Abel, 2011).

***Partnerships and outsourcing.*** Platt University utilizes key partnerships and outsourcing relationships for the benefit of its workforce development efforts. One example is the CU's 12 year relationship with the BlueVolt to outsource 1,150 e-learning training programs through the use of a company-wide LMS. This relationship allowed Platt University to avoid a significant investment of capital to develop its own LMS. Platt maintains an annual service contract with BlueVolt and pays a monthly fee for use. Todd (2004) describes the practice of CUs outsourcing online learning delivery to a learning management system (LMS) provider. This same author stated that the steady growth of CUs adding LMSs indicates the important role they fulfill in delivering and tracking online training. Chapman (2008) describes the benefit of an LMS as providing access to learning 24 hours a day, seven days a week and 365 days a year and condenses

learning time by 50-60% when compared to classroom instruction. Dealtry (2000) described the importance of e-learning as a way to distribute shared knowledge throughout the organization. Veldsman (2004) indicated that CUs tend to use both virtual and blended learning, so that it is available “anywhere, anytime, anyhow, anyone, and anyway” (p. 28). Workers are increasingly accessing online self-paced learning instead of waiting to take an in-person training course (Anderson, Hardy, & Leeson, 2008).

## **Theme #2: Factors not Consistent with Platt University and Abel’s Conceptual Framework**

This section will examine four areas of operations in Platt University that were not consistent with Abel’s conceptual framework. They are: (a) the sales revenue model, (b) partnerships with community colleges, (c) partnership with sales and marketing, and (d) the tuition reimbursement model.

**Sales and revenue model.** Platt University contributes to the organization’s selling efforts by creating hundreds of product courses to educate the workforce. Meister (1998) asserts that CU leaders must act as business partners by attending strategy meetings with senior leadership, knowing the product and services, and creating learning solutions that support business operations. “For a corporate university to be successful, it must fit and be accepted into the organizational culture, directly affect bottom-line results ...” (Grenzer, 2006, p. 125). Wheeler and Clegg (2005) agreed, indicating that CUs gain needed resources if they focus on issues of concern to the organization.

**Partnerships with community colleges.** Platt University has a long-term relationship with Clackamas Community College. Both business and academic institutions benefit from partnerships. Nielsen, Baird, Browning, and Milliron, (2003)

described the purpose of business education partnerships as two-fold: (a) meet the demand of educating an evolving labor force, and (b) fund new revenue sources to educational institutions. Grenzer (2006) stated that “Learning alliances are good ways to outsource certain functions. Organizations can jointly enter into institutional agreement, whereby course and learning events can be put toward degrees or certification” (p. 125). Meister (1998) said that companies who offer college credit for work-related training are viewed by perspective employees as a more desirable place to work.

**Partnership with sales and marketing.** Abel (2008) described Human Resources as being the department that CU partners with to develop a recognition system to promote employee learning accomplishments. However, this particular CU instead partnered with the Sales and Marketing Department to recognize learning accomplishments. Meister (1998) stated, “Having an understanding of hard business skills, such as knowing how to read a profit and loss statement, understanding and internal rate of return, having a command over the capital allocation process are key to workplace competency” (p. 92). Platt business unit leaders have confidence in this CU’s programs as an effective means to improve business knowledge and increase profitability.

**Tuition reimbursement model.** Tuition reimbursement was not mentioned in Abel’s profiles or factors. Todd (2004) found that CUs spent approximately 5% of their operating budget on tuition reimbursement. Miller (2013) indicated that, on average, organizations report spending 10% of their training budget on tuition reimbursement (ASTD, p. 17). Platt University uses tuition reimbursement as a tactical expenditure and requires employees to describe how the class is both job related as well as benefitting the learner. Cherry (2014) indicated that organizations usually require that courses are job

related, or degrees that can be reasonably expected to lead to a position at the company with more responsibility. Ivery (2014) said tuition reimbursement must be tailored to meet the business need of the organization.

### **Theme #3: New Profiles and Factors Identified within Platt University**

The third theme identified one new profile and five new operational factors. The one new profile is leaders as teachers, and the five operational factors are: (a) partnerships with vendors, (b) partnerships with outside organizations, (c) use of course prerequisites, (d) timing of required training, and (e) integrated systems model.

**Leaders-as-teachers profile.** This research project discovered a fifth profile, the Leaders-as-Teacher's profile. Abel's (2008) conceptual framework contains four fixed profiles and 15 static operational factors. This new fifth profile interacts naturally with all other profiles and has demonstrated a transformation of the original conceptual framework into a true learning system. "A current trend is to use top leaders as teachers in developmental programs as well as coaches and mentors to high potentials" (Fulmer & Bleak, 2008, p. 170). Meister (1998) agreed by stating: "Many corporate universities have shifted the focus of facilitating learning from experts to internal leaders" (p.50). Similarly, "All leaders can and must be teachers" (DeSmet & McAlpine, 2010, p. 2). Concerning leaders as teachers, Senge (2006) stated that "Great teachers create space for learning and invite people into that space" (p. 329). Betof (2014, p. 5) described the six key benefits of using the leaders-as-teachers approach. Including:

- Helps drive business results
- Stimulates the learning and development of leaders and associates
- Improves the leadership skills of those who teach

- Strengthens the organizational culture and communications
- Promotes positive business and organizational change
- Reduces cost by leveraging top talent

Tichy and Cohen (2002) claimed that “...winning companies win because they have good leaders who nurture the development of other leaders at all levels of the organization” (p.

3). Platt University has successfully implemented the leaders-as-teachers concept since it began operations in 1988.

The scarcest resource in the world today is leadership talent capable of continuously transforming organizations to win in tomorrow’s world. The individuals and organizations that build leadership engines and invest in leaders developing other leaders have a sustainable competitive advantage (Tichy & Cohen, 2002, p.10).

The following are four examples of how the leaders-as-teachers profile interchanges with the other existing profiles and provides systems benefits to the organization.

- Organizational Profile: the leaders-as-teachers model develops the teaching and mentoring skills of company leaders.
- Operational Profile: the leaders-as-teachers model optimizes the investment of human capital by leveraging in-house talent for university instructor roles.
- Learning Delivery Profile: experienced managers bring credibility and practical work experience to classroom training, and their own knowledge is enhanced through acts of teaching and mentoring.
- Partnership Profile: internal business units, academics, and outsourced vendors work in collaboration to deliver training and manage learning processes within the organization.

Finally, “winning organizations use learning, teaching, coaching, and mentoring in ways that their competition does not” (Betof, 2014 p.38).

**Partnership with vendors.** Platt has found great value in working with product manufacturers to create a win-win relationship for Platt and the vendor. Platt University operates using a combination of the corporate budget model, and a new fifth type described as a vendor funding model. The vendor funding model has not been mentioned in any academic literature to date. In this model, manufacturers/vendors that sell products through the parent organization of the corporate university underwrite a portion of course development costs for training that will be delivered on the wholesaler’s LMS. This model benefits the vendor, the parent organization, and the organization’s corporate university by increasing product sales.

Companies with corporate universities have recognized that the success of their suppliers and customers is critical to their own success. Instead of treating suppliers as adversaries or, worse, like disposable diapers to be discarded when their function is accomplished – enlightened companies are taking the view that they need to build partnerships with key links in their business channel, (Meister, 1998, p. 43)

**Partnerships with outside organizations.** Platt University has formed a significant partnership with the Toastmasters organization to help employees improve their communication and speaking skills. Senge (2006) described the importance of leaders who create a shared vision for the organization with their ability to communicate with clarity. “Effective communication makes leadership possible” (Booher 2010, p. 70). The higher you advance in the organization the more you will be asked to speak. Taking a course in public speaking will be a great benefit to your career. (Kouzes & Posner, 2002). At Platt, senior leadership desires that all company leaders be competent communicators

and has formed a strategic partnership with Toastmasters to help employees gain important communication and leadership skills.

Smith & Stitts (2013) stated:

Toastmasters provides another opportunity for students to develop their oral communication and critical thinking skills. This highly acclaimed and well developed professional program is an integral part of our students' development and gives them the freedom to determine how far they want to go in becoming accomplished speakers and leaders. (p.79)

**Use of course prerequisites.** Quality training results require a significant investment in time and financial resources. Left unmanaged, the organization can experience a significant growth in training costs that do not correlate to the expected training outcomes. Platt University helps business units manage their training process by requiring all employees to follow course prerequisites ensuring that courses are sequenced and completed in their proper order. George-Leary and Cohen (2007) agreed with the need for sequencing of development offerings so that employees understand how to progress within the organization. “The corporate university has to be a company-driven platform for growth and development” (Dealtry, 2010, p. 24). It is critical that CU leadership manage the training and development process to ensure maximum return on investment.

**Timing of required training.** Masie (2014) stated that in some organizations as much as 70% of learning is dedicated to mandated or required training. This raises two potential equity issues, (a) is required training equally accessible to both hourly and salaried employees, and (b) is the timing of required training fairly distributed to both hourly and salaried employees during their regular workdays. First, research indicated that accessibility of training appears to be equally distributed as all members of the



organization as the mission of the CU is to develop our people. For the past two years Platt University has reported 100% of all Platt employees, both hourly and salaried have participated and completed required training. Levin (2003) stated that it is important for organizations to ensure that learning opportunities “. . . are widely and fairly distributed to those who might benefit from them (p. 7). “The skills and knowledge acquired promotes each worker’s continued employability – the ability to find a meaningful job inside or outside the organization” (Meister 1998, p.9). Goldin and Katz (2008) described the indirect effects education as providing a benefit to both employees and employer. Education provides opportunities for employee’s higher income and employers can see an increase in productivity.

Second, is the equity issue concerning the timing of required training by both hourly and salaried employees during their regular workday. During the research interviews, seven employees mentioned their struggle to fit required training into a standard 40 hour workweek. This finding was important as it signaled possible inequities between hourly and salaried workers. While an hourly learner’s enthusiasm for training reflects an effective corporate university, wage and hour laws are a concern. It was important to review Federal law concerning this issue, as some significant differences exists between hourly (non-exempt) and salaried (exempt) employees. According to the United States Department of Labor Wage and Hour Division and the Fair Labor Standards Act (FLSA), concerning training and seminars (FLSA Fact Sheet #22), hourly workers are to be given time to complete required training at work or compensated with overtime if they must complete the training before or after their regular shift.

Attendance at lectures, meetings, training programs and similar activities are viewed as working time unless all of the following criteria are met:

- Attendance is outside of the employee's regular working hours;
- Attendance is in fact voluntary;
- The course, lecture, or meeting is not directly related to the employee's job; and
- The employee does not perform any productive work during such attendance" (p. 1).

In the past, Platt leadership understood that if the hourly employee voluntarily takes training to prepare for a future promotion opportunity within the company, the government allows the employee to take training after their regular work hours and no compensation is required. However, the latest review of the law concerning hourly workers and training time has led this CU's governing board to re-classify all training offered by the company, either voluntary or required, as work related and must be completed during the employees regular work hours. In contrast, salaried workers are free to complete required training on their own time after their regular work hours with no additional compensation. In conclusion, Goldin and Katz (2008) said "a better educated workforce facilitates the adoption and diffusion of new technologies (p. 40).

**Integrated systems model.** This research has revealed that Platt University operates as an integrated system. "The corporate university objective is to create space, time, resources and infrastructure systems that will combine personal and group development processes to produce well-directed top performing managers and people in all functions and at all levels in the organization" (Dealtry, 2010, p. 25). Kast and Rosenzweig (1972) described the Input-Transformation-Output Model where the open system operates as a transformation model. This CU receives numerous inputs, transforms them, and exports outputs.

Our concept of organizations is moving away from the mechanistic creations that flourished in the age of bureaucracy. We now speak in earnest of more fluid,

organic structures, of boundaryless and seamless organizations. We are beginning to recognize systems, construing them as learning organizations . . . (Wheatley, 2006, p. 15)

Basic characteristics of an open system are environment, input, throughput and output (Capra, 1996). Furthermore, systems are composed of interconnected parts (Ashmos & Huber, 1987). Finally, businesses units must not operate as independent pieces, but rather parts of a system with connections to the organization's suppliers and customers (Meister 1998).

### **Limitations of the Study**

There are limitations to this study. This organization has 123 locations in nine Western states; however, the study was limited to the greater Portland metropolitan area. This study only gathered a small sample of 18 interviews to represent 1,240 people. A larger sample including sales managers, product specialists, product buyers, inventory specialists, accountants, and credit managers could have given additional insight into this research by adding information according to their respective understanding.

An additional limitation to the study was that the survey sample proved to be management heavy. Of the 18 interviews only five were hourly employees, meaning that 28% of interviews were speaking on behalf of the 80% who are Platt's hourly employees. The study design used a combination of random and purposeful sampling. Creswell (2008) described "purposeful sampling as the researcher intentionally selecting individuals and sites to learn or understand the central phenomenon" (p. 214). It would be helpful to extend the use of purposeful sampling to include a larger group of hourly employees.

Finally the sample selection did not consider ethnicity, so it is not known how representative the interviews were concerning the ethnic diversity of the company. The organization is approximately 75% white male. Hearing from the smaller, but growing diverse employee population would add important cultural and gender perspectives to this research.

### **Recommendations for Further Research**

Given the paucity of the research on CUs, several questions remain concerning CUs, their operation, and their outcomes. Some questions include: (a) to what extent does the proposed model, with its additional profile and factors, operate in other existing CUs? (b) what portions of the model appear to be most important or critical for CU success, leading to the intended outcomes? (c) what portions of the model do not appear to be factors that appear and affect existing CUs? (d) is there a relationship with ethnicity and success in CU training? (e) is there a relationship between gender and success in CU training? (f) is there a relationship between the different generations in the workplace and the growing digital divide?

In addition to these questions related to the model, some questions that relate to issues facing Human Resource Development (HRD) practitioners include: (a) in what ways, if any, do CUs support HRD efforts to attract, onboard, develop, and retain organizational talent? (b) how do CUs contribute to the organization knowledge management process? (c) in what ways can CUs support HRD efforts to analyze and address employee skill gaps? (d) in what ways can CUs support HRD efforts concerning annual performance evaluations and career planning efforts? (e) how do CUs support HRD in safety and compliance requirements? and (f) how do CUs support HRD learning

initiatives to enhance employee development efforts? In attempting to answer these questions, practitioner or scholar-practitioners might examine their own organization or undertake benchmarking with other organizations.

With these various questions some suggestions emerge as to potential future research efforts. A case study of one or more CUs from the same industry might be undertaken to determine what portions of the proposed framework appear to operate in these organizations. A multiple case study examining CUs in different industries could enhance the literature and aid in answering some of the questions being posed.

A survey of CUs should be undertaken to examine the degree to which the proposed model fits and, in particular, whether one or another of the profiles leads to greater benefits to the organization. Because existing studies have simply examined CUs with non-CU organizations, it would be appropriate to conduct a more detailed examination that compares CU organizations with organizations having well developed training department. Indeed, such a study may aid HRD practitioners in helping the organization to decide when and whether to establish a CU.

Much of this research has been conducted at one time. It would be appropriate, therefore, to undertake a longitudinal study of one or more CUs. To what extent do the processes and outcomes continue? Furthermore, comparison over time with organizations without CUs, but with well-developed training departments may provide further evidence as to the long-term benefits and costs of the CU. One suggestion is to conduct a regression study of change in gross sales per branch and change in types of training (as categorical explanatory variables), or to conduct a regression study of the change in sales per branch as a function of the change in the total number of trained

employees per branch. Further work of this type may lead to the development of methods for assessing the ROI on CU training costs. Another area of research would involve an assessment of company resilience, as measured by "bench strength," or the number of trained individuals to do the given number of jobs in the company.

### **Implications for CU Practice**

The findings of this study point to 10 implications for addressing and improving CU operations: (a) the CU contributes to the organization's selling efforts, (b) the CU partners with a community college to award college credit, (c) the CU partners with the marketing and sales department to recognize and reward learning accomplishments, (d) the CU deploys the tactical use of tuition reimbursement for employee development, (e) the CU uses the leaders-as-teachers model, (f) the CU uses vendors as trainers and marketing partners, (g) the CU partners with Toastmasters for communication and leadership development, (h) the CU uses course prerequisites to optimize training results, (i) the CU addresses adequate time and required training, and (j) the CU employs an integrated systems model. These implications or recommendations are described in greater detail below.

#### **Recommendation 1: CU Contributes to the Organization's Selling Efforts.**

Platt University contributes to the organization's selling efforts by partnering with business unit leaders to create training courses that educate the workforce in effective ways to sell products. Because of this relationship, business units have provided Platt University with additional financial and operational resources to help create these training courses. Meister (1998) suggested that CU leaders must become active business partners. CUs can gain credibility when their leaders understand the business purpose of

the organization and communicate using financial and industrial terms to address organizational training needs. Finally, it can also be helpful for a CU leader to modify his/her personal perspective and begin to view themselves as a business manager in a training assignment.

### **Recommendation 2: CU Partners with a Community College to Award College Credit**

CUs may benefit from an educational partnership with a community college to award credit for work related training. Awarding college credit for company sponsored training can be viewed as an important benefit by employees as well as help to improve the organization's recruitment and retention efforts. CU leaders could benefit by working with community college administrators to customize credit offerings to include company training programs and on-the-job cooperative work experiences.

### **Recommendation 3: CU Partners with the Sales and Marketing Department to Recognize and Reward Learning Accomplishments**

Abel (2008) described Human Resources as being the department that CU partners with to develop a recognition system to promote employee learning accomplishments. However, Platt University has instead partnered with sales and marketing to develop a recognition system and promote employee learning accomplishments. This partnership has created several benefits for Platt University. First, both employees and branches are recognized for the number of courses and training tracks completed company-wide. Second, employees can earn cash incentives for completing selected product courses through the BlueBuck reward system. Third, because of sales and marketing's promotional efforts this CU has gained increased

visibility resulting in the annual course completion rates rising from 24,000 in 2010 to 113,000 in 2014. Platt University is now seen as a valuable business partner achieving significant training and business results. CU leaders may also find benefits in working with their sales and marketing department to develop a recognition system to promote employee learning accomplishments throughout the organization.

#### **Recommendation 4: CUs Tactical Use of Tuition Reimbursement for Employee Development**

Tuition reimbursement was not mentioned in Abel's factors. However, Platt University has successfully used tuition reimbursement in the company's employee development process. Employees who have a desire to enroll in college classes first work with their supervisor and the director of education to ensure that classes are work related and beneficial to the learner. Not all classes are reimbursable, nevertheless, the goal of this planning process is to help employees enroll in courses that fit within a transferable associate degree. Completing introductory classes at the community college level is also more cost effective. Other CU directors may benefit by using this tactical approach to their tuition reimbursement program.

#### **Recommendation 5: CUs Use of Leaders-as-Teachers Model**

CU leaders who implement a leaders-as-teachers profile will find an important development tool for the growth of both leaders and learners within the organization. Leaders who teach are challenged to develop their communication and leadership skills, and they contribute by helping develop talent within the organization. Employees benefit from the leaders-as-teachers process as they have opportunities to hear helpful workplace stories and learn practical work experiences that expand their understanding of the



company mission, culture, and core values. Employees learn the importance of giving back to the organization, through teaching and sharing their own work experiences. The importance of developing a learning organization is mostly understood, however, it is equally important for CU leaders to help develop a teaching organization as well. Finally, it is important that CU leaders develop teams of teachers for a particular class our course. The average size of a teaching team at Platt University is six qualified teachers per class. These teachers work in teams of two or three and rotate their responsibilities throughout the year. CU directors may want to consider this team teaching model.

#### **Recommendation 6: CUs use Vendors as Trainers and Marketing Partners**

CU leaders who operate within a wholesale or retail distributor may find benefit by partnering with the product vendors represented within their organization. Platt University has product vendors who provide training materials, marketing materials, and financial support to help underwrite the development costs of product courses. Product vendors benefit as employees of the wholesaler or retailer complete training courses that enable the company to sell more products. “Corporate learning programs are even beginning to drive the business” (Fulmer, 2002, p. 120).

#### **Recommendation 7: CUs Use of Toastmasters for Communication and Leadership Development**

Platt University has successfully utilized Toastmasters to help train company managers and sales people in effective communication and leadership skills. The Toastmaster program offers consistency in training methods, curriculum, and experiential skill development. For larger organizations with operations in multiple states or regions, Toastmaster’s training provides a unique value in that all graduates share a common

language and shared skill set. CU leaders need to consider the substantial contributions Toastmasters can bring to their organizations.

In addition, Platt has partnered with three other outsourced vendors to help facilitate the company's leadership development efforts. First, Platt had a partnership with the Dale Carnegie Corporation. Several Platt managers graduated from their leadership development program and several sales people have successfully completed their sales effectiveness program. Platt has found Carnegie training to be effective. Course instructors ask each Platt participant to develop a final class project that helps defray a significant portion of the cost of training by either reducing expenses or increasing sales. The second Platt partnership is with AchieveGlobal, now MHI Global. This organization provides training programs in leadership development and sales skills. Several Platt leaders became certified in AchieveGlobal's Train-the-Trainer program. This allowed Platt employees to teach AchieveGlobal's strategic selling program company-wide. The third vendor was the Disney Institute; Platt sent the company's director of education to the Disney Institute to learn the Disney way of leadership. The director has implemented several leadership improvements at Platt since returning from Disney.

Finally, it is important to note that there are other vendors such as Development Dimensions International (DDI), a global organization that provides customized leadership training to 25 nations, and the Center for Creative leadership (CCL). CCL offers customized leadership training solutions as well as public workshops for top executives, senior leaders, and individual contributors. Additionally, Wilson Learning offers training in key areas of communications including, conflict resolution,

negotiations, and delivery of effective presentations. This is not an exhaustive list of vendors, but these represent vendors that may be useful to other CUs.

### **Recommendation 8: CUs Use of Course Prerequisites to Optimize Training Results**

Training is expensive and must be managed to ensure a good return on the investment. Platt University helps business units manage their training process by requiring that all employees follow course prerequisites to ensure that courses are sequenced and completed in their proper order. This process helps employees gain the knowledge and experience necessary before they move on to the next higher-level of classes. Following a similar prerequisite or sequencing process could benefit other CUs.

### **Recommendation 9: Adequate Time and Required Training**

It is important for CU leaders to identify the number of required courses within the curriculum and work with the organizations leadership to determine the total number required to complete. Employees can feel stress when it comes to meeting a deadline to complete a mandatory course. Managers need to be particularly aware that hourly, non-exempt employees can feel additional pressure to complete required courses during their regular shift.

Depending on the hourly employees work assignment the manager could provide time during their regular shift to complete the required training. Or the manager could approve overtime for completing the mandatory training before or after their regular shift. Salaried, exempt employees do not have the same time restrictions and can complete required courses on their own time after their regular work hours.

### **Recommendation 10: CUs as an Integrated Systems Model**

It is essential that organizational leadership view CUs as an integrated system instead of independent components. Platt University receives numerous inputs, transforms them, and exports outputs. Meister (1998) described CUs as a system that includes employees, customers, vendors, and colleges. The goal of a corporate university leadership is to build a learning system that can positively impact business results. (Wheeler & Clegg 2005). Grenzer (2006) said that a successful CU must align with all parts of the organization and become knowledge-sharing network. Finally, leaders who implement a systems approach to CU operations will help strengthen the organization's competitive advantage.

### **Summary**

In this chapter, findings were discussed in three parts as the major themes emerged from this research data. Three themes are:

- Factors consistent with Platt University and Abel's conceptual framework
- Factors not consistent with Platt University and Abel's conceptual framework
- New profiles and factors identified within Platt University

The first theme confirmed that a majority of Abel's (2008) profiles and operational factors identified in this CU's operations. This framework has four profiles. They are: (a) Organizational, (b) Operational, (c) Learning Delivery, and (d) Partnership.

The second theme described four areas within Platt University CU that were different from Abel's (2008) conceptual framework. These differences are (a) sales

revenue model; (b) partnerships with community colleges; (c) partnership with sales and marketing department; and (d) the tuition reimbursement model.

The third theme identified a new fifth profile and five new operational factors within Platt University. This new profile is that of leaders-as-teachers that is interconnected with the each of the four original profiles. The five new factors are (a) partnership with vendors; (b) partnerships with outside organizations; (c) use of course prerequisites; (d) timing of required training, and (f) the integrated system model. Finally, this chapter ended with a recommendation for future research and ten recommendations for practice.

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## **APPENDICES**

## **Appendix A: Definitions of Terms Important for this Study**

*Archive.* An archive is defined as an electronic repository of data and documentation.

*Asynchronous training.* Asynchronous training is defined as electronic web-based instruction that is learner-directed, self-paced, and not restricted by time or geography.

*E-learning.* Learning that is conducted online via the Internet or web.

*Epistemology:* A branch of philosophy that investigates the origin, nature, methods, and limits of human knowledge.

*Equity:* A quality of fairness and impartiality

*Factors:* One of the elements contributing to a particular result or situation.

*Framework:* A set of assumptions, concepts, values, and practices that constitutes a way of viewing reality.

*Governance:* A leadership group that provides strategic guidance, policies, and procedures for the effective operation of a corporate university.

*Learning Management System (LMS).* A web-based training delivery system that allows organizations to design, deliver, and document online training programs.

*Method:* A procedure, technique, or way of performing an action within a defined activity.

*Mission statement:* A statement that defines what an organization is, why it exists, and its reason for being.

*Online learning:* Delivery of online courses that can be viewed either asynchronously or synchronously through a Learning Management System (LMS).

*Outsourcing:* Procuring services or products from an outside supplier in order to reduce costs or improve services.

*Partnerships:* A relationship between individuals or groups that is characterized by mutual cooperation and responsibility, for the achievement of a specified goal. In this research, partnerships include internal corporate departments, human resources, training vendors, and higher education.

*Profile:* A formal summary or analysis of data, often in the form of a graph or table, representing distinctive features or characteristics

*Strategy:* A plan of action intended to accomplish a specific goal.

*Synchronous training delivery:* Refers to web-based training instruction that is led by an instructor in real-time. Examples include conference calls, video conferences, or web conferencing. Synchronous training can be electronically archived for viewing at a later date and time convenient to the learner.

*Web-based training:* A presentation, lecture, or workshop that is transmitted online. Web-based training can be archived for viewing at a later date and time.

*Vision statement:* A statement that communicates both the purpose and values of the organization.

*Webcast:* A specific type of web-conference that is typically one-way from the speaker to the audience. The audience has limited interaction. Webcasts can be archived online for viewing at a later date and time.

*Webinar:* A specific type of web-conference that is typically one-way from the speaker to the audience. However, in a webinar there can be more collaboration including polling, asking questions, and providing answers during the live presentation. Webinars can be archived online for viewing at a later date and time.

### Appendix B: Observation Checklist

Name of Observer \_\_\_\_\_ Date of Observation \_\_\_\_\_

Operation Being Observed \_\_\_\_\_

Location of Observation \_\_\_\_\_ Time \_\_\_\_\_

<b><u>Things to Observe</u></b>	<b><u>Comments</u></b>
1) ___ Classroom layout within the CU (location, number, and size of classrooms).	
2) ___ Classroom training hours – Length of class and university operations	
3) ___ Classroom seating arrangements including number of chairs, desks, screens, whiteboards and seating style (U-shape, theater, or other)	
4) ___ Classroom electronic resources (Video conference, data projectors, PC's, large screen TVs, and audio/visual equipment)	
5) ___ Classroom curriculum (handouts displays and training equipment)	
6) ___ Classroom wall charts, logos, banners, job aids, mission statement and other signage	



7) ___ CU Instructors (number, gender)	
8) ___ CU Instructors. (Appearance, mannerisms, presentation style lecture, facilitation, or other)	
9) ___ CU Instructors interactions with learners. (online and or in-person)	
10) ___ CU Support staff (number and gender)	
11) ___ CU Support staff interactions with learners. (online and in-person)	
12) ___ CU Support staff physical layout (number of chairs, desks, and PC's)	
13) ___ CU Learner (number and gender)	
14) ___ CU Learner interactions with Instructors and Support Staff. (online and in-person)	
15) ___ CU Learner interactions with online recourses. (PC's, training aids, and LMS)	
16) ___ LMS course design PowerPoint, video, Interactive and learner interface	
17) ___ LMS course categories and curriculum offerings	

18) ____ LMS transcripts , testing and evaluation structure	
19) ____ LMS course length	

### **Appendix C: Participant Interview Questions**

#### **1) President /CEO (Organizational Profile Questions)**

- a. How does Platt University support the company's mission & strategies?

Example:

- b. Describe your role in the governance or leadership of Platt University.
- c. In what ways have you personally contributed to policy and operational change within the university?
- d. Do you have a teaching or mentoring role in the university? Please describe:
- e. How have you personally utilized Platt University in your own career development? Please explain:
- f. In what ways does the University affect company recruitment efforts?  
Please describe:
- g. In what ways does the University affect new employee orientation? Please describe:
- h. In what ways do does the University affect employee retention efforts?  
Please describe:
- i. In what ways does the University affect Vendor / Factory partnerships/ relationships?
- j. In what ways does the University affect Internal Business Units partnerships / relationships?
- k. How does the University support product sales? Please describe:
- l. How does the University support safety training? Please describe:

- m. How does the University support sales training? Please describe
- n. How does the University support leadership development? Please describe
- o. Please describe the University's funding model.
- p. What classroom training do you find most helpful? Why?
- q. What classroom training do you find least helpful? Why?
- r. What classroom training is currently missing and needs to be developed?  
Why?
- s. What online courses do you find most helpful? Why?
- t. What online courses do you find least helpful? Why?
- u. What online courses are currently missing and need to be developed?  
Why?
- v. Concerning the operations of the University:
  - i. What is working well?
  - ii. What could improve?
- w. What have I not asked you about Platt University that you would like to discuss?

## 2) VP HR (Organizational Profile Questions)

- a. How does Platt University support the company's mission & strategies?  
Example:
- b. Describe your role in the governance or leadership of Platt University.
- c. In what ways have you personally contributed to policy and operational change within the university?

- d. Do you have a teaching or mentoring role in the university? Please describe:
- e. How have you personally utilized Platt University in your own career development? Please explain:
- f. In what ways does the University affect company recruitment efforts?  
Please describe:
- g. In what ways does the University affect new employee orientation? Please describe:
- h. In what ways do does the University affect employee retention efforts?  
Please describe:
- i. In what ways does the University affect Vendor / Factory partnerships/ relationships?
- j. In what ways does the University affect Internal Business Units partnerships / relationships?
- k. How does the University support product sales? Please describe:
- l. How does the University support safety training? Please describe:
- m. How does the University support sales training? Please describe
- n. How does the University support leadership development? Please describe
- o. Please describe the University's funding model.
- p. What classroom training do you find most helpful? Why?
- q. What classroom training do you find least helpful? Why?
- r. What classroom training is currently missing and needs to be developed?  
Why?

- s. What online courses do you find most helpful? Why?
- t. What online courses do you find least helpful? Why?
- u. What online courses are currently missing and need to be developed?  
Why?
- v. Concerning the operations of the University:
  - i. What is working well?
  - ii. What could improve?
- w. What have I not asked you about Platt University that you would like to discuss?

3) VP Marketing (Partnership profile – Internal business unit questions)

- a. Describe your internal business unit's partnership role with the University.
- b. Do you have a teaching, mentoring or support role in the university?  
Please describe:
- c. How have you personally utilized Platt University in your own career development? Please explain:
- d. How have you utilized the University's classroom training programs to support your business unit? Example?
- e. What classroom training do you find most helpful? Why?
- f. What classroom training do you find least helpful? Why?
- g. What classroom training is missing and needs to be developed? Why?
- h. How have you utilized the University's online training programs to support your business unit? Example?
- i. What online courses do you find most helpful? Why?

- j. What online courses do you find least helpful? Why?
- k. What online courses are missing and need to be developed? Why?
- l. Concerning your internal business partnership with the University:
  - i. What is working well?
  - ii. What could improve?
- m. What have I not asked that you would like to discuss about Platt University.

4) Division Manager (Partnership profile – Internal business unit questions)

- a. Describe your internal business unit's partnership role with the University.
- b. Do you have a teaching, mentoring, or support role in the university?  
Please describe:
- c. How have you personally utilized Platt University in your own career development? Please explain:
- d. How have you utilized the University's classroom training programs to support your business unit? Example?
- e. What classroom training do you find most helpful? Why?
- f. What classroom training do you find least helpful? Why?
- g. What classroom training is currently missing and needs to be developed? Why?
- h. How have you utilized the University's online training programs to support your business unit? Example?
- i. What online courses do you find most helpful? Why?
- j. What online courses do you find least helpful? Why?

k. What online courses are currently missing and need to be developed?

Why?

l. Concerning your internal business partnership with the University:

i. What is working well?

ii. What could improve?

m. What have I not asked that you would like to discuss about Platt University.

5) LMS National Account Manager (Partnership profile – External vendor)

a. How long have you had a partnership with Platt University?

b. What is the purpose of this partnership? Please explain:

c. How do you support the University's training programs?

i. Online? Yes – No: Example

ii. Classroom? Yes – No: Example

iii. Other? Yes – No: Example

d. What feedback have you received concerning your performance in the University?

e. Concerning your partnership with the University:

i. What is working well?

ii. What could improve?

f. What have I not asked that you would like to discuss about Platt University.

6) Sales Training Consultant (Partnership profile – External vendor)

a. How long have you had a partnership with Platt University?



- b. What is the purpose of this partnership? Please explain:
- c. How do you support the University's training programs?
  - i. Online? Yes – No: Example
  - ii. Classroom? Yes – No: Example
  - iii. Other? Yes – No: Example
- d. What feedback have you received concerning your performance in the University?
- e. Concerning your partnership with the University:
  - i. What is working well?
  - ii. What could improve?
- f. What have I not asked that you would like to discuss about Platt University.

7) Community College Administrator (Partnership profile – Academic institution)

- a. How long have you had a partnership with Platt University?
- b. What is the purpose of this partnership? Please explain:
- c. How do you support the University's training programs?
  - i. Online? Yes – No: Example
  - ii. Classroom? Yes – No: Example
  - iii. Other? Yes – No: Example
- d. What feedback have you received concerning your performance in the University?
- e. Concerning your partnership with the University:
  - i. What is working well?

ii. What could improve?

f. What have I not asked that you would like to discuss about Platt University.

8) CU Instructor (Learning Delivery Profile & Operational Profile)

- a. How long have you been an employee of Platt?
- b. How long have you been an Instructor at Platt University?
- c. Describe your role as a University Instructor?
- d. Why do you teach at the University? Please explain
- e. Please describe the name and purpose of your class
- f. How does your class or course support Platt's larger mission and strategy?

Please explain:

- g. What results have you seen from your training efforts? Please explain
- h. What challenges do you face as a University Instructor? Please explain
- i. Do you have the necessary resources and training for your role as an Instructor? Please explain
- j. How have you utilized Platt University in your own personal career development? Please explain
- k. Concerning Platt University operations:
  - i. What is working well?
  - ii. What could improve?
- l. What have I not asked that you but you would like to discuss about Platt University.

9) Branch Manager (Learning Delivery Profile & Operational Profile)

- a. How long have you been employed at Platt?
- b. How long have you been in a management role?
- c. How have you utilized Platt University in your own personal career development? Please explain:
- d. How have you utilized Platt University in your employee development efforts? Please explain:
- e. How could the University better support your employee development efforts? Please explain
- f. What classroom training do you find most helpful? Why?
- g. What classroom training do you find least helpful? Why?
- h. What classroom training is currently missing and needs to be developed? Why?
- i. What online courses do you find most helpful? Why?
- j. What online courses do you find least helpful? Why?
- k. What online courses are currently missing and need to be developed? Why?
- l. Concerning the operations of Platt University:
  - i. What is working well?
  - ii. What could improve?
- m. What question have I not asked that you would like to discuss about Platt University.

#### 10) Branch Participant (Learning Delivery Profile & Operational Profile)

- a. How long have you been employed at Platt?

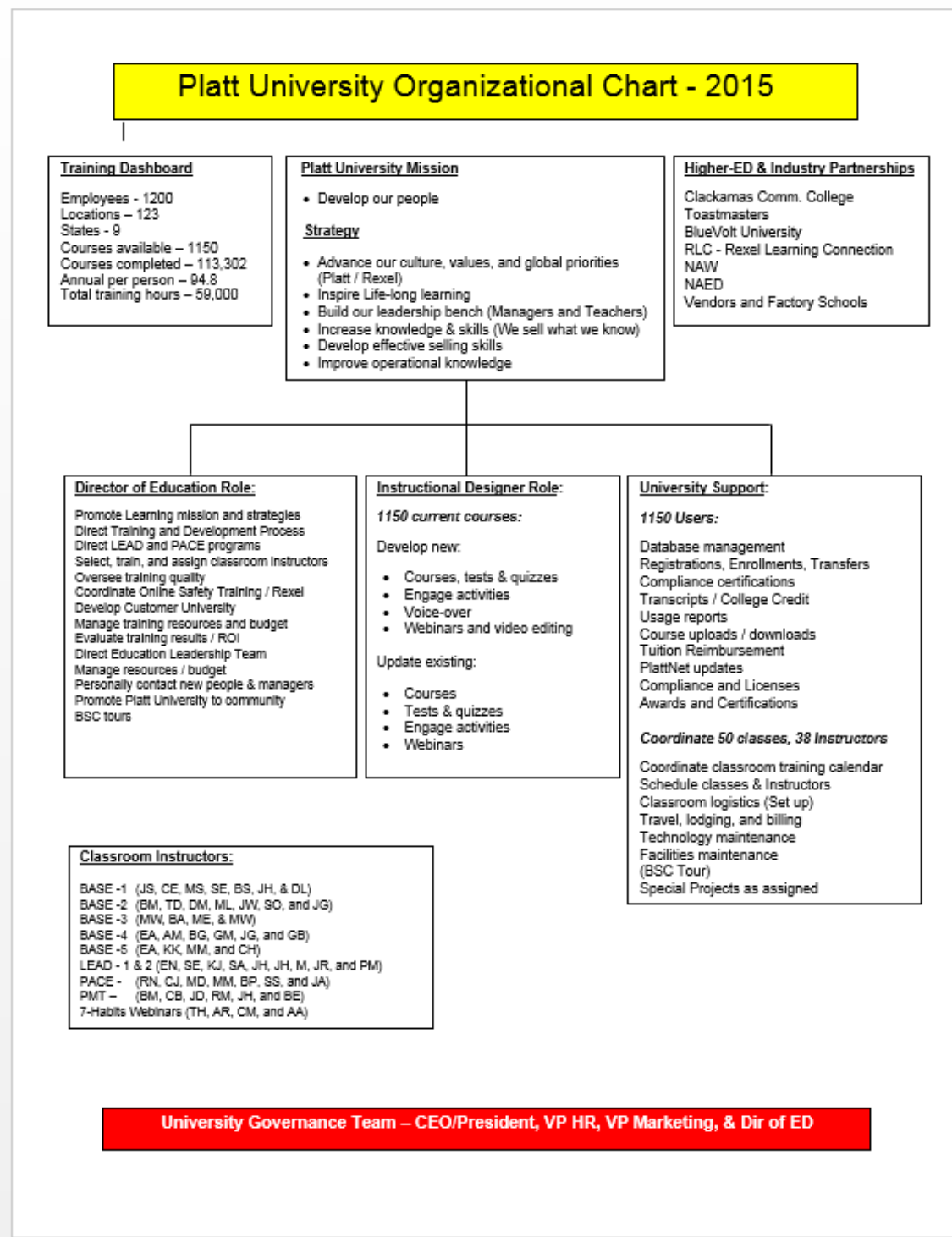
- b. How have you utilized Platt University in your own personal career development? Please explain:
- c. How does your supervisor support your training and development efforts? Please describe:
- d. How could your supervisor improve his or her support of your career development? Please explain
- e. What classroom training has been most helpful to you? Why?
- f. What classroom training has been least helpful to you? Why?
- g. What classroom training is currently missing and needs to be developed? Why?
- h. What online course has been most helpful to you? Why?
- i. What online course has been least helpful to you? Why?
- j. What online course is currently missing and needs to be developed? Why?
- k. Concerning the operations of Platt University:
  - i. What is working well?
  - ii. What could improve?
- l. What have I not asked that you would like to discuss about Platt University.

## **Appendix D: Platt University Training Goals for 2015**

### **(1/5/15)**

- Continue to contact new employees and introduce them to University programs
  - Contacted 175 new employees in 2014 – continue same process in 2015
  - Review Career Path Process
- Continue to develop a bench of (6) qualified teachers for each class classes:
  - 7-Habits Webinars
  - BASE-1, 2, 3, 4, & 5
  - LEAD-1, 2
  - PACE
  - PMT
- Interview and select PACE-23, 23, & 24 class participants and Instructors
- Work with LEAD Program manager to increase LEAD graduation rates
  - LEAD-1 (70 participants)
  - LEAD-2 (50 participants)
- Work with RVP's development of the Saturday Delivery Driver Certification program
  - Finalize program details and checklist process
  - Select and train a certified Instructor for each region
  - Manage document tracking and testing process
- Develop training resources for the upcoming Windows, 2010, 2013, & 365 conversions
  - Excel
  - Outlook
  - PowerPoint
  - Word
- Work with Rexel to improve interactivity of their safety training videos
- Update Platt University with new User Interface (UI)
- Create a standard process for course development and video productions
- Train and certify (2) people in the video editing procedures
- Begin a pilot test of Platt Customer University – (Assign specific customers and measure their participation and feedback.
- Update the 90, 180, and 365 day courses
- Update the tuition reimbursement process
  - Develop a glossary of academic terms to help our people understand the tuition reimbursement as it interfaces with the community college
    - Example: Define semester hours, quarter hours, transfer degrees, certificates, fees, course test and other academic terms.
- Work with RSC to update Branch Procedures Manual quizzes & MINCRON Training
- Develop new online courses:
  - 60 new product courses
  - 50 new operational courses


## Appendix E: PLATT UNIVERSITY ORGANIZATIONAL CHART – 2015



**Appendix F: 1988 PLATT UNIVERSITY PENNENT**




## Appendix G: PLATT UNIVERSITY ONLINE COURSE CATALOG



**PLATT UNIVERSITY**

Search:

Pin Code:

Home Training Tracks Course Catalog My Account Contact
 Reward Center
Admin Logout

[Show All Courses](#)

**Platt University Online**

**Categories**

**1. Platt Essentials**

- [A. How to Use Platt U Online - Employee](#)
- [B. How to Use Platt U Online - Manager](#)
- [C. Operating Policy](#)
- [D. Safety](#)
- [E. 90 - 180 - 365 Courses](#)
- [F. PlattNet Training](#)
- [G. Profit & Loss](#)
- [H. Core Competencies](#)
- [I. 401-K Investments](#)
- [J. Credit](#)
- [K. Expense Reports](#)
- [Z. Platt APP & Platt.com Training](#)

**2. MINCRON - AS400 Training**

- [A. Order Processing](#)
- [B. Branch Logistics](#)
- [C. Inventory Management](#)
- [D. Branch Office Functions](#)
- [E. Branch Management](#)
- [F. Resource Center](#)
- [G. Activities](#)
- [H. Accounts Payable Maintenance](#)

**3. Product**

- [A. Product Identification & Assessments](#)
- [B. Merchandising](#)
- [C. Branch Level 2 Product Specialist](#)
- [D. Vendor Training](#)
- [E. Promotional Magazine Training](#)

**4. Professional Development**

- [A. BASE Classes](#)
- [B. PMT](#)
- [C. Supervisor Training](#)
- [D. PC Training Courses](#)
- [E. Certifications](#)
- [F. Sales Plan Training](#)
- [G. Self-Help Books](#)
- [H. Contract Workshop](#)
- [I. Super Tool Day](#)
- [J. Export Training](#)

**5. Communication**

- [Community Service](#)
- [Toastmasters](#)

**6. Webinars**

- [Platt - Webinars](#)
- [Product Type - Webinars](#)
- [Vendor - Webinars](#)

**7. Warehouse 75**

**8. Courses Outside of Platt U**

- [Accounting Courses](#)
- [HR Courses](#)
- [Marketing](#)
- [Professional Development](#)
- [Vendor Training](#)
- [College Courses](#)



## Appendix H: ON-COURSE TRAINING MATRIX



# On-Course Training Matrix

Workplace Skills				Product Knowledge																		
Job Function	Personal Development	Procedures Training	PO Skills	Control Automation		Core					Datacom		Power & Lighting				Utility		Green		Levels	
				Control	Automation	Pipe & Wire	Connective Materials	Boxes & Ranges	Wiring Devices	Tools	Datacom	Video Surveillance	Power	Lighting	Lighting Controls	Lamps	Refrigeration	Unions	Distribution	Solar / Renewable Energy		Energy Efficiency
Warehouse	10-180 360 Day Safety Course, National Training (Email guidelines)	Equipment Operation (Troubleshoot Manual)	Entry, Read, Build	X	X	X	X	X	X							X		X		X	X	X
									X										X			2
Driver	10-180 360 Day Safety Course, National Training	Equipment Operation (Troubleshoot Manual)	Entry, Read, Build	X		X	X	X	X	X				X								1
																						2
Counter	10-180 360 Day SASE 1-3, National Training (Email guidelines)	Open Order, Counter-Build	Intermediate Entry, Read	X	X	X	X	X	X	X			X	X	X	X	X	X	X	X	X	1
						X	X			X				X		X				X		2
										X											X	
Inside Sales	10-180 360 Day FASE, SASE 1-3, Local FASE	Initial Build	Intermediate Entry, Read	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	1
				X		X	X			X	X			X	X			X				2
				X						X	X			X								
Assistant Manager	10-180 360 Day FASE, SASE 1-4, Local FASE	Inventory Management, Office Procedures	Intermediate Entry, Read	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	1
				X	X	X	X			X	X		X	X	X	X	X		X	X	X	2
				X	X	X				X	X			X	X	X		X			X	X
Manager	10-180 360 Day FASE, SASE 1-5, Local FASE	Financial Management, Performance Management, Recruitment, Retail Management	Intermediate Entry, Read	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	1
				X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	2
				X	X	X			X	X	X	X	X			X	X			X	X	X
Outside Sales	10-180 360 Day SASE 1-6 Outside, Local FASE	Initial Build	Intermediate Entry, Read	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	1
				X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	2
				X	X	X			X	X	X	X			X	X					X	X
Regional Product Specialist	10-180 360 Day SASE 1-7 Outside, Local FASE	Initial Build	Intermediate Entry, Read	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	1
				X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	2
				X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X

## Appendix I: CAREER DEVELOPMENT DOUMENT



### Career Development



At Platt, we must work as one team to build a successful career development plan

#### Every Individual:

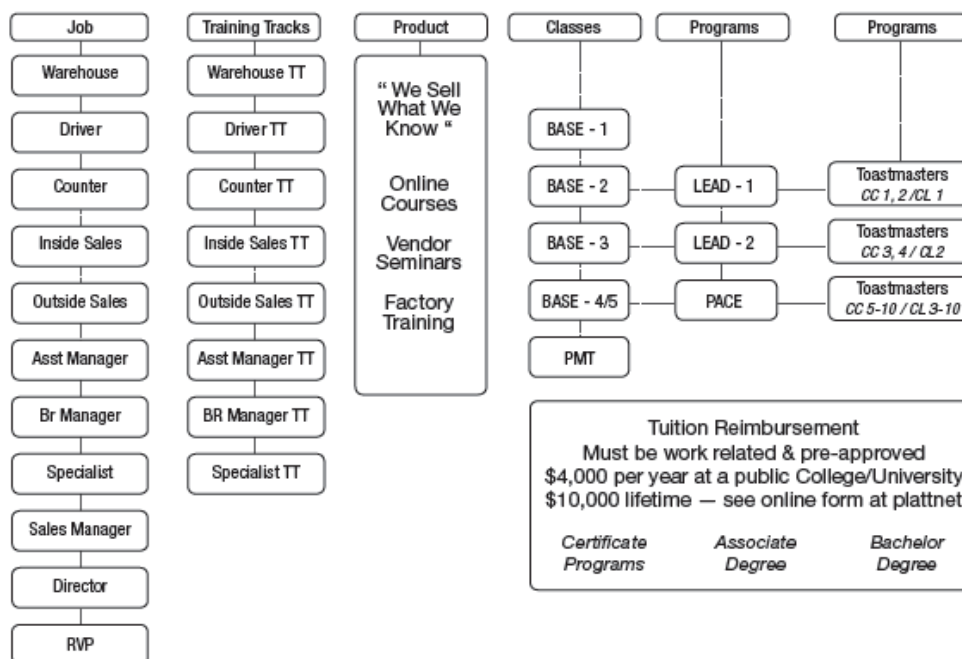
- Have a career mission
- Accept responsibility for your own career development
- Assess your interests, skills, values, and attitude
- Seek out career information and resources
- Establish career goals
- Utilize development opportunities
- Talk with your manager about your career
- Follow-up with realistic career plans

#### Every Manager:

- Provide development assignments and support
- Participate in career discussions
- Support employee development plans
- Provide timely performance feedbacks

#### Our Organization:

- Provide training and development opportunities
- Provide career information and programs
- Offer a variety of career options
- Communicate mission, policies, and procedures



Please contact with any questions:  
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[www.platt.com](http://www.platt.com)

## Appendix J: TUITION REIMBURSEMENT PRE-APPROVAL REQUEST



### Tuition Reimbursement Pre-Approval Request

1. To be eligible for tuition reimbursement:
  - a. Undergraduate-level courses must be **work related** and **pre-approved** by your supervisor, Dir. of Education, and Company Officer.
  - b. Graduate-level courses must be work related and requires the pre-approval of Jeff Baker and Rexel Holdings USA.
2. Reimbursement is limited to:
  - a. \$4,000 per year at the **public college/university rate**
  - b. \$10,000 life-time
  - c. (2) classes per term
  - d. Includes tuition, books, and parking expenses
  - e. A or B = 100%, C = 50%, D or below = 0%
  - f. Pass/no Pass must be **pre-approved**
  - g. Must show proof of passing the course and payment of costs incurred.
3. **Employee agrees to:**
  - a. Continue employment for an additional 24 months after the date of last reimbursement.
  - b. If terminated or voluntarily leaves Platt, employee agrees to pay back reimbursement issued during the last 24-month period.
4. Platt Electric Supply reserves the right to change, modify, alter, or cancel this policy at its sole discretion at any time and for any reason with or without notice.

Please Initial: *I have read,  
understand, and agree  
with Platt's Tuition  
Reimbursement Policy.*

**Appendix K: CLACKAMAS COMMUNITY COLLEGE WORKFORCE  
DEVELOPMENT AND PARTNERSHIP AWARD**



**Appendix L: MT. HOOD COMMUNITY COLLEGE WORKFORCE  
DEVELOPMENT AND PARTNERSHIP AWARD**



## Appendix M: 2014 EDUCATION AWARDS

