Staten Island Chamber of Commerce

**The Training and Education Institute:
A Design Framework**

Submitted by:

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I. Overview

The Staten Island Chamber of Commerce (SICOC) hired Educational Consulting Group (ECG) in July 2001 to assist in the development of a Training and Education Institute. If established, the institute would provide management development services to community businesses. Through market research, ECG gathered information that should provide an initial framework for this training initiative.

Through market research, ECG gathered information that provides an initial framework for this training initiative. ECG interviewed representatives of major training institutions and national chambers of commerce; spoke with and met Staten Island training specialists, Chamber members, and professional association and corporate representatives; and conducted Internet and library research to not only identify management training trends and formats, but also to determine the feasibility of such an institute.

II. Summary

The SICOC has myriad options for establishing a training and education institute. From nationally recognized institutions, such as the American Management Association (AMA), to local contractors, SICOC can pull from diverse training expertise and resources to enrich the local workforce at the upper and mid-management levels. The Chamber can custom design offerings to meet businesses' specific needs and that provide opportunities to apply classroom learning on site. Or, it can choose from many "off-the-shelf" packages offered by consultants and management training firms. Courses and training services are also available through online "e-learning," distance learning, and self-study workbooks or textbooks.

The SICOC can approach the institute's development in several ways, from an introductory event, such as a "business summit," or sequential courses leading to Chamber certification. Courses can focus on current training trends, such as strategic planning, and project and knowledge management, or the Chamber can custom design curricula to respond to interests identified in the 1999 Training and Education Institute survey. The Chamber might also consider mainly serving small business managers, given that they are numerous on the Island and could benefit from training addressing recent trends. Many of the survey's fields of interests are standard components of most management training programs.

Quality training programs vary in cost, leaning towards the high end. There are basic course fees; additional costs are associated with the consultant or contracted firm, particularly where needs assessments and planning are required. In most instances, contractors include materials in course fees. Custom-designed courses will likely cost more than "off-the-shelf" curricula; the former best meet the community's business and training needs. In terms of marketing, the Chamber might consider raising funds through

the foundation marketing or corporate sponsorship, since survey responses indicate that companies or individuals seek moderate to low course fees.

The SICOC could attract the business community's interest and involvement in a training and education institute through learning opportunities beyond the scope of existing training options, coursework centered on current management trends and best practices and offerings that directly address the unique business community on the Island, particularly small businesses.

III. Findings

A) Training Trends

In the year 2000, businesses greatly valued training and put significant financial resources into programs for employees. Training's *The Training Industry Report 2000: A Comprehensive Analysis of Employer-Sponsored Training in the United States* (Attachment I) best highlights these trends:

- Total dollars budgeted for formal training this year by U.S. organizations: $54 billion
- Of that sum, amount that will go to outside providers of training products and services: $19.3 billion
- Percentage of U.S. organizations that teach employees to use computer applications: 99%
- Percentage that pay to teach some employees remedial math/arithmetic: 35%
- Percentage that will send some employees to an outdoor experiential program: 12%
- Of all formal training, percentage currently delivered by an instructor via remote location: 6%
- Of all training delivered online, percentage in which the student interacts online with other humans: 29%
- Of all computer-delivered training, percentage devoted to teaching computer skills: 55%
- Of all computer-skills training, percentage delivered in a classroom, by live instructors: 72%

Also noted in the report are the most common training areas in which companies are interested. Those that rated highest in 2000 included new employee orientation, leadership, sexual harassment, new equipment operation, performance appraisals, team building, safety, problem-solving/decision-making, train-the-trainer, product knowledge, public speaking/presentation skills, hiring/interviewing, and time management. (Attachment II)

Management or corporate education programs provide myriad offerings that cross professional levels, interests, industries, subjects, and demands. Most contractors can custom design programs, which is typically recommended. There are training "hot topics" that address growing business and management trends. However, trends are

global in nature and may not necessarily meet the business needs of a specific community.

New manager programs: Downsizing in large companies has eliminated key management levels. Administrative and/or support staff are taking on managerial roles or duties, but the lack the skills set required for this work. Training grounds these individuals in areas such as supervision, financial management, and communication skills.

Project Management: This is an extension of new managers training, providing individuals with the skills and techniques necessary for project management. Areas of study include effective project planning and organizing, understanding the role of the project manager, goal-setting, time management, and interacting with others.

Communication: This is more relevant to mid-level managers and small businesses, and includes areas such as effective business and technical writing, and presentation, listening, speaking, and interpersonal skills.

Knowledge Management: This is most applicable to mid- to large-sized companies with complex information systems and that rely heavily on technology. Knowledge management is: "creating and storing knowledge in repositories; measuring the financial value of knowledge; facilitating the transfer of knowledge, and; creating a knowledge-sharing environment. The most common initiative—building knowledge repositories—is intended to take some form of knowledge that has been extracted from people's heads and store it in an information system for later access." ("Trends in Workplace Learning: Supply and Demand in Interesting Times." ASTD. 2001.)

In essence, knowledge management pulls together and makes accessible information from all aspects of a business, particularly that which can further its growth and success, and contribute to efficient operations. It also retains institutional memory, catalogues in-house expertise, creates a database of in-house documents and procedures (contracts, purchase records, templates, evaluations) and prevents duplication of existing ideas, systems, and strategies.

Leadership Development: This enhances managers' abilities to address economic, technological, and societal trends. Leadership development occurs at the senior, middle, and new management levels, with courses ranging from the fundamental to the strategic functions of effective leaders. Leadership coaching and development (LCD) is emerging in organizations seeking to develop leadership skills across all levels. There are several types of leadership development and coaching programs: traditional leadership development, mission and vision development, culture change programs, organizational redesign, managing people performance, and continuous change planning and coordination. (Source: "Growing Leaders. Yearout, Miles, Koonce. ASTD. 2001)

The AMA sponsors courses for new and mid-level managers that center on the basics of leadership, such as characteristics of effective leaders, creating performance-driven teams

and departments, and becoming a successful coach, mentor, or motivator. The American Chamber of Commerce Executives runs the Center for Creative Leadership for senior

executives. This institute focuses on the role of leadership in dynamic organizations, the factors that contribute to executive success and derailment, the transformation of leadership from an individual activity to an organization-wide process, and the challenges and conflicts arising from societal and economic trends. Leadership Greater Bridgeport runs a 10-month leadership development and community engagement initiative that, among other things, requires attendees to participate in a group project.

Management education and leadership development can go hand-in-hand as there is overlap—to be a good manager one has to be a good leader. Courses can and do combine the knowledge and skills development essential to both areas. For example, the AMA's Management Course for New Presidents is grounded in leadership development principles. Participants can assess their leadership styles, create corporate visions and futures by broadening their knowledge of new markets, technologies and the environment and social demands, learn how to develop and interact with people, and formulate strategy. Another school of though is that a manager and a leader are two different things; "a successful leadership program must address the shortcomings that prevent many [managers] from becoming leaders." ("Growing Leaders." Yearout, Miles, Koonce. ASTD. 2001)

Technology: This is relevant to business professionals at all levels, and can include basic computer skills to developing knowledge management systems. Typically, training involves using technology for financial management, creating databases, learning how to use Power Point, marketing via the Internet, web design, mastering word processing programs, desktop publishing, etc. Several interviewees suggested that many small businesses on Staten Island could benefit from introductory computer courses and basic training in programs and systems that could improve their management and marketing skills.

Training Program Profiles
(Primary Source: *Executive Development: Preparing for the 21st Century*. Moulton & Fickel. 1993.)

Typically, senior management offerings are more strategic and conceptual in nature, with an eye towards the long-term in an inclusive business environment. Middle management programs are more skills-based or functional in nature—they teach the how and what of something. Small businesses are more likely to benefit from offerings that provide basic tips, advice, and guidance for increasing business and staying afloat in a tough economic climate. Non-profit administrators benefit from the strategic and conceptual elements of senior management training, though there are programs specially designed for this audience, such as those offered by Columbia University's Institute for Not-for-Profit Management. The following describes the generic structure of management training programs.

Executive Programs: These are typically designed for middle managers, upper-middle managers, top functional managers, senior executives, and corporate officers. Corporate executive development programs are usually reserved for managers and executives on succession planning tables. Program content is directed towards business strategy, the external and internal environment of business, and organizational behavior.

Rather than being skills-based, training focuses on updating knowledge, enhancing perspective, and reevaluating attitudes. Participants build and draw on their experience. Robert Fraulo, Senior Vice President of Corporate Learning Services of AMA New York suggested engaging managers in strategic planning on issues directly related to their work and that can ultimately be implemented at their businesses. Trainers facilitate learning by providing information and materials on current issues and practices, and apply interactive learner-centered approaches. Fraulo listed some "hot topics" for executive level training: succession planning, building strategic alliances, rethinking business, hiring in a period of downsizing, finances for service-based industries, and examining management styles.

General Management Programs: These programs prepare executives with functional backgrounds for future general management responsibilities, particularly in the role of the general manager. The typical curriculum might include business and policy and strategy, U.S./international business environment, management systems, management-science/quantitative methods, management techniques and styles, organizational behavior and human resources, economics, finance and accounting, marketing operations, and industrial relations. For senior managers, content focuses on business policy, strategy, and the business environment. For middle managers, content is focused on functional management and management techniques. Courses are more step-by-step, use case scenarios (rather than drawing from experience), and offer more functional programs, such as coaching and dealing with difficult people.

Functional Programs: These programs focus on specific business-related topics that include:

- **Finance:** This area enhances financial and non-financial executives' knowledge and understanding of corporate financial and accounting systems and concepts, and their role in successful business operations. Areas of study include capital structure, budgeting, and markets, financial statements, dividend policy, and mergers and acquisitions. More senior programs deal with strategic financial issues; lower-level offerings provide a non-technical view of basic accounting and financial concepts.

- **Marketing:** This area provides executives with current knowledge of the marketing function from varied perspectives. Subjects include marketing strategy, pricing and growth strategies, market analysis, analytic tools, organization of the marketing function, sales planning, market research, sales force management, etc. Middle management looks more towards the sales and distribution function; senior executives examine marketing's strategic aspects.

- **Operations:** This area increases the understanding and knowledge of operations and manufacturing function of industrial organizations. Topics include manufacturing and corporate strategy, production planning and materials management, inventory management, systems, process control, robotics, human resources management, procurement, etc. More senior programs cover strategic questions in the operations sector, such as corporate strategy relationships, productivity, and quality, whereas middle managers center on the operational aspects of manufacturing, such as production control, human resources development, and materials control.

- **Technical:** This area enhances understanding and knowledge of managers in engineering, research, and technical areas of the role and impact of technology on business operations. The content is designed for the management of research and design and engineering organizations, or the technological and scientific content and implications of decision-making. Topics would include technology trends, research and design as it relates to marketing and operations, innovation, etc. Senior executives would be interested in management issues; mid-level technical managers would focus on offerings with heavy technical content.

C) Small Business

Small businesses can certainly benefit from management training programs; for those businesses with fewer than 20 employees, mid- to lower-level functional management training would be more appropriate. Perhaps the best description of small businesses' training needs comes from the Australia-based Small Business Professional Development (www.smallbusiness.info.au). It recommends:

- Focusing on practical solutions to real, immediate business problems is highly desired by small businesses and helps them appreciate the tangible benefits of training, especially when efforts are made to connect training solutions directly to business needs. When the focus is more on training solutions, it is still important to constantly and directly link these back to business outcomes.
- Having a genuine and structured approach to helping the business participants identify their business and training needs at the outset is a must. Small businesses tend to shun generic one-size-fits-all training programs and wish to have their own specific needs included in the program.
- Generally, businesses prefer a less formal approach to training. This means they prefer informal settings, less didactic delivery and the opportunity to learn by discussion and debate. Nevertheless, some participants prefer the formal approach of expert-driven delivery. Whatever the case, small businesses like to see some structure in place.
- Flexibility is crucial to busy people. They need choice in when, where and how they learn. This can mean offering sessions out of work hours, repeating sessions at different times, and using independent learning resources. Seasonal factors and business cycles need to be taken into account, as well.

- Training programs should offer plenty of opportunity for practicing skills, as people rarely master things by having just one go. Arranging for participants to practice skills in the workplace between sessions is a good way of achieving this.
- Workplace visits by providers before, during and after programs help providers to contextualize the program to real needs and situations, gain the trust of the participants, assist with transferring the learning back to the workplace, and encourage businesses to continue their training efforts and take a systematic approach.
- Focusing on all three elements of competence--knowledge, skill and attitude--is necessary. If there needs to be an emphasis on one element (e.g., attitude in customer service), the others should not be ignored.
- Mixing previous participants with new participants has many advantages. It provides further development for previous participants and they can be valuable allies in selling and delivering the benefits.

Training should be relevant to the existing economic climate and actual challenges small businesses face. Reading small development resources—journals such as Business Week and Web sites such as More Business.com—is the best way to identify trends and design subsequent training. For example, perusing such resources, ECG found current trends and issues. (Please refer to Addendum III for sampling of small business development topics.)

IV) Logistics

Putting together an institute requires legwork and financial resources. The following outlines some important things to consider should the institute initiative be pursued.

A) Expenses

Consultant fees: Note that while there are standard or average fees, total costs depend on the scope and type of training offered. Fees for planning, consultant travel, etc., are often separate from the total training package, unless otherwise negotiated

- *Hourly:* The range is from $55 to more than $150. Nancy Adelis, President of Adelis Systems, said $200 per hour would be standard. Some consultants have a flat rate.

- *Per day:* The range is from $250 to $10,000. For example, the Institute for Non-Profit Management charges $7,000 for a six-hour day; the AMA averages about $3,850 a day. Adelis noted that an average range for most vendors would be $1,400-$2,500 a day. It is possible to negotiate a cost for a training series, though the dollar difference would likely not be significant.

- *Per trainee*: The average daily cost is $250. However, this ranges depending on the type of training, who conducts it, and whether the fee includes materials, etc. Brochures from major training companies suggest that course fees are higher than the average.

Marketing fees: Marketing and selling the institute will be among the project's most expensive components. If the Chamber partners with a well-established vendor, such as the AMA, it can use its marketing services at an additional cost. For example, the AMA can produce quality materials and also recruit from audiences citywide, especially in Manhattan and Brooklyn.

Facilities: Rental fees for training space are another consideration. The Chamber should seek, where possible, pro-bono space (such as that offered by the Department of Labor) or program co-sponsorship to reduce or eliminate fees at potential training locations.

B) Training format

Scheduling: For business professionals, finding the time for training is tough. The goal is to minimize time while delivering a quality learning experience.

Senior executives have limited time and therefore, are less likely to participate in sessions that interfere with their workday or workweek. Split sessions are best. The AMA's Robert Fraulo recommends a sequential course series that runs 1.5-2 days on weekends (starting on a Friday evening and continuing through Saturday), every six weeks to two months. The time lapse enables participants to apply what has been learned "back on the job." The disadvantage is having participants commit to program completion. Fraulo suggests offering the courses twice during the year to accommodate participants who have missed a session or cannot participate in particular session because of time conflicts.

Middle and small business managers prefer to attend sessions—half day (three hours)— during the workday (i.e., a "brown bag" lunch series) or on site, after work hours.

According to the Chamber and BUCKS surveys, respondents favored half-day sessions, indicating moderate interest in 1-2 day sessions. In the Chamber survey, respondents preferred non-consecutive sessions, were moderately responsive to sessions running over several weeks, and were split regarding evening hours.

Incentive: It is hoped that individuals participate in training because growth and knowledge are incentives. For most people, training is viewed as a way to improve professional skills, become better leaders, and catapult careers. There are many professionals for whom training is required to acquire continuing education credits, another "incentive." Others appreciate certificates or some type of "official" credential that acknowledges their training participation and completion. The Chamber might offer institute "graduates" its official seal or emblem.

Planning: Working with consultants involves several steps, especially if the Chamber wants to directly address its constituents' needs and interests. A thoughtful contractor might want to review surveys and reports regarding Staten Island's existing training and related needs, meet with key Chamber members and business leaders, custom design

courses, etc. There will be decisions about the format and order of the courses, what goals to reach, and what businesses hope to achieve. Because Staten Island's business involvement in training is somewhat tenuous, such planning is necessary to ensure interest, participation, and institute success.

C) Choosing Programs

For steps to selecting contractors for the training and education institute, ECG found the following from Bricker's International Directory most informative.

Guidelines for Selecting Executive Programs
(www.pertersons.com/brickers/guidelines.html)

…Whether you're looking to send one executive or many, you want to receive a high return on the investment. That means narrowing the field to programs that can accommodate individual learning needs, meet your expectations for quality, and are aligned with your organization's management philosophy and strategic goals. The guidelines below highlight several key factors toward that end. In general, the more thorough the selection process, the better the opportunity for getting the performance results you want.

Learning Objectives

Identify critical business issues that need to be addressed through an executive program-- both organizational goals and those of immediate concern and directly relevant to individual executives.

Clarify both personal and organizational expectations, including whether the primary objective is to build skills, enhance subject matter knowledge, or initiate a change in mind-set.

Match the program to the executive's learning style, for example, one with an experiential component for an executive who responds better to hands-on activities rather than pure lecture or case discussions.

Faculty

Assess the level and nature of the faculty's business experience, including the type and size of companies they've worked with and in what capacity.

Find out whether the faculty has experience teaching executives as compared to strictly undergraduate or graduate-level business students.

Compare the faculty's management orientation to that of your organization by reviewing faculty publications, bios, and other background information.

Observe the faculty in action if possible by visiting classes, attending speaking engagements, or viewing videotaped presentations.

Determine the availability of faculty for consulting or coaching participants on individual issues.

Content

Ask for a detailed program schedule--not just an overview of topics addressed--to see how time is allocated.

Get a sense of how the subject matter will be approached by speaking to the program director; different programs often treat the same content in different ways.

Gauge how much exposure participants will have to state-of-the-art management practices and theories, for example, by reviewing a syllabus or bibliography to see how recent the teaching or study materials are.

Consider the level, nature, and relevancy of assignments, including in-class exercises, individual homework assignments, group projects, and any pre-program preparatory work.

Check on any high-tech aspects of the program, for example, to assure a comfort level for executives unaccustomed to working with computers or, conversely, access to up-to-date tools for the technologically adept.

Evaluate activities that involve individual psychological assessments and/or counseling as to whether they will be conducted by qualified professionals and are suitable for particular executives.

Participant Mix

Find out whether the program attracts a largely regional, domestic, or international participant base, especially if your organization is looking to foster a cross-border or cross-cultural perspective.

Consider the industry representation as to the relative advantages of having an executive interact with others from the same industry or from a broad industry mix.

Determine the average age, experience, and career level of typical program participants and other such factors relevant to productive peer group exchange.

Teaching Methodologies

Gauge the level and nature of interaction between faculty and participants that is facilitated by the program format, including opportunities for informal exchange outside the classroom.

Evaluate the type and variety of teaching methods and technologies used, which may include case studies (ask how current they are); lectures by faculty and outside experts; directed discussion; role plays; performance feedback tools; group projects; individual exercises; participant presentations and reports; games and business simulations; self-assessment/diagnostic instruments; and instructional or interactive videos. A variety of methods can be important, especially in long programs, to enhance learning and ward off boredom.

Determine the opportunities participants will have to implement or practice the skills they learn both in class and back at work, for example, action learning activities focused on current business issues of participants and their organizations, or action plans outlining specific steps participants intend to take after the program's over to apply what they learned.

Assess the value of outdoor or other physical learning activities with regard to whether they are appropriate for individual executives and transferable to the business environment. Also be sure such activities are supervised by individuals with proper qualifications/credentials and pass muster with your organization's legal department regarding insurance liability.

Find out if follow-up activities are part of the program, either formal or informal, as a means to reinforce learning over time or to support an ongoing network among faculty and participants.

Quality Control

Look for clear and detailed program learning objectives that describe specific ways in which attendees will benefit from their participation.

Evaluate sample program materials both for substance and with regard to the overall written quality of the documentation.

Contact previous users of the program for their views about the strengths, weaknesses, and ultimate value of the program--both colleagues at other organizations who have sent participants as well as the participants themselves.

Visit program sites and audit individual programs whenever possible, particularly when you are considering sending several executives or using the program on an ongoing basis.

V. Implementation Challenges

According to the Chamber and BUCK surveys, and several interviewees, there is a need for and an interest in training on Staten Island. However, there are several factors that could impede the institute's development:

- Most Staten Island businesses are "small," often with less than 20 employees; thus training in terms of time, resources, and "relevance" might not be a priority.

- Small businesses may not value training's impact on day-to-day operations, or the longer-term benefit in areas relevant to small business, such as communications, customer service, marketing, and increasing business.

- Businesses may not adequately assess their needs and therefore, be interested in training that may not be useful to them, or that requires prerequisite knowledge. For example, businesses may want to enhance their marketing efforts, but have not evaluated their product or service to determine its worth, effectiveness, or marketability. Businesses may also believe that they do not require training.

- Survey results indicate that many businesses would pay a minimal amount for training; for "high end" contractors, this might not be sufficient.

- Staten Island corporations, such as Con Edison, Keyspan Energy, and Verizon, have in-house training services that meet employees' training requirements, address industry-specific trends and demands, and provide management and leadership training. These companies either depend on internal expertise or outsource. Some training is mandated, while other offerings are optional and rely on employee interest and motivation for participation. These companies tend to run a yearlong training series with myriad optional and mandated offerings from which employees can choose.

- Specialized industries, such as hospitals and nursing homes, and accounting and real estate firms, participate in moderately priced or free training offered by industry-specific contractors and/or associations. These courses provide certification and continuing education credits professionals require in their fields. For example, nursing home professionals tend to receive training through the New York State Department of Health, and the Board of Realtors offers leadership training within the context of real estate.

- There is some competition with local organizations such as BUCKS, the Department of Labor, and the College of Staten Island, primarily in terms of small business development. However, these entities provide a strong gauge of the response level the Chamber can anticipate from local businesses to proposed training seminars. They also pose an opportunity for collaboration.

- The Chamber survey is over two years old and thus may not accurately reflect businesses' current interests or those of specialized industries. (A recent BUCKS survey might be more reflective of current needs. Attachment V)

VI. Implementation Plan

Taking into consideration current training trends, interviewee responses, survey results, and potential obstacles, ECG suggests plan of action for the first year of project implementation, with some ideas for the second and third years of operation.

<u>Year I</u>

A) Administration and delivery

Purpose: The Chamber should concretize what it hopes to achieve through the institute, identifying goals and measurable objectives. This will drive the ultimate format of the institute, help in the selection of contractors and focus assessments. One element is to grow local business community's understanding of the value of training. Key to this process is clearly identifying and naming community business needs, assessing the Chamber's capability to provide a full-range of management training services,

Institute Management: Hire a part-time coordinator to oversee the institute's development, hiring of contractors, marketing efforts, registration, outreach to the business community, etc.

Contractor: Hire one contractor or a set of contractors to design curricula/training modules and facilitate training. It is important to note that a single contractor cannot address all topics, needs, or interests. The Chamber might consider hiring specialists on a per course basis or looking into companies that provide comprehensive offerings across disciplines (such as the AMA). Industry-specific training should rely only on industry experts; for example, if local restaurants seek staff training, the consultant should have thorough knowledge of restaurant staffing issues, not generic expertise in personnel management. The Chamber might want to jumpstart the institute with vendors with which it is familiar, while researching other contractors to engage as the institute evolves. Most important is that the contractor not focus on generic offerings, but work closely with the Chamber and related parties to design coursework that is community specific.

Funding: Establish and fundraise for a first-year operational budget that includes: average course and contractor fees, costs of materials, marketing, and venues, marketing expenses, and personnel (coordinator, support staff). It is important to keep in mind that at least initially, participants would prefer low cost offerings, which suggests the budget should include funds to offset most participant fees, perhaps on a sliding-scale basis or in the form of scholarships or stipends.

Marketing: Identify marketing costs and processes for a cost-efficient way to draw interest in the training initiative. This might best be done internally, with monies available merely for quality visual presentation.

B) Institute Format

Audience: *Mid-level management and small business*

These audiences are most representative of the majority of the businesses on Staten Island (mid-level management was identified as a key audience in the Chamber survey). The Chamber could narrow its focus to areas that the majority of the survey respondents represent: professional or business services, health care, financial services, and retail/wholesale/food services/leisure.

The SICOC might consider working with upper level managers on a limited basis, perhaps in the form of a weekend institute or leadership development conference to gauge the likelihood of their interest in Year II programming

Topics and coursework: *Functional mid-management and small business focus*

Generic topics listed in the SICOC and BUCK surveys and trends should be adapted to community management and business needs. Or, the Chamber might sponsor generic management training offerings to jumpstart the institute. In Addenda II and III (pages 25-29), ECG has placed asterisks next to course topics the Chamber could offer during the institute's first year of operation.

It is important is that courses are derived from the most current trends and best practices. It would be helpful if these courses had direct workplace application and enabled participants to review actual workplace concerns, needs, challenges, and interests. The Chamber can offer groupings of these topics/courses focused directly on the key industries highlighted in the survey. (See Audience.) For example, a course grouping could include trends such as new employee orientation, communications, and customer service just for the food service industry. The Chamber must ensure that it is not duplicating offerings provided by other training entities and/or industry-specific associations.

Scheduling and Format: *2-3 hour, half-day, or full-day non-sequential sessions offered every two months, on a cyclical "semester basis" (courses offered in the spring are repeated in the fall)*

Short, non-consecutive sessions seem to interest most people. The Chamber might consider offering a several courses in a day to garner a broader audience. Non-sequential courses do not demand—but leave the option—for further attendance. Perhaps these courses can be directly linked to a Chamber networking event.

An introductory option could be a "business summit," as suggested by the AMA's James Burke, Director of Strategy. This could be a one-day event that draws businesses together in a conference-like setting where participants attend a series of sessions—led by established professionals—that give them a taste of "hot" management and business trends. They network with professional colleagues from boroughs outside of Staten Island, hear from prestigious speakers, have lunch and breakfast, and receive materials. The goal of the "gala" is to draw attention to the value and excitement of training, and hopefully incite interest. Attendees can complete questionnaires regarding future offerings. The AMA could organize the entire event, including the marketing and outreach to audiences beyond Staten Island.

This is not an inexpensive proposition; Burke estimates it could cost between 40-50K, and depending on the number of participants, could run registrants between $99-$199. Burke suggests seeking corporate sponsorship for this type of event. The greatest risk is that the event does not produce community buy in, thus an expensive "dead end" in the long run.

Evaluation:

The Chamber should design assessment that determines whether institute goals and objectives have been met, what works, what additional offerings people want, how to extend institute offerings, etc.

Outreach and research:

During the institute's development and implementation, The SICOC should conduct additional research to begin planning for Year II, and primarily to better identify the business community's needs and interests, reduce or eliminate local competition, and perhaps form partnerships. Suggested activities include:

- Meeting with heads of professional associations and groups that support businesses, such as the Rotary Club and the Kiwanis, to consider ways the Chamber can support, supplement, and perhaps underwrite their training needs. Additionally, the Chamber should broach collaboration on training efforts, bringing the fragmented business community closer together.

- Meeting with heads of industry-specific associations to discuss co-sponsorship, filling in training gaps, collaboration, and industry trends. Perhaps the Chamber can serve as a clearinghouse for and underwrite a portion of mandated training requirements.

- Contacting the human resource departments of all large businesses on Staten Island, such as Verizon, Con Edison, Sears, and Home Depot, to explore the type of training they provide, their training needs and/or gaps, and to whom they outsource training as a way to pitch the Chamber as a source for training services.

- Contacting agencies such as the Department of Labor, particularly the Job Service Employee Committee, BUCKS, and the College of Staten Island to learn what they are offering, what draws the largest audiences, what not to duplicate, and on what to build.

- If the Chamber also wants to reach out the non-profit community, ECG recommends meetings with its key members or leaders to identify training needs.

Years II & III

The Chamber can consider:

- Extending the first year format into a sequential series of offerings that leads to some type of certification or accreditation.

- Broaden its upper-level management offerings, perhaps offering weekend series every six months, with a sequential option leading to some type of accreditation or certification.

- Establish a leadership development institute, similar to that run by the Bridgeport Regional Business Council. This effort combines the best of business management and leadership development, can engage managers from businesses across industry, ensures continuity and the application of new skills, and seems unique to what most other associations and business development entities are providing on the Island.

- Serve as a clearinghouse for all Staten Island business and management training, offering to underwrite a large portion of the services through foundation resources. This is with the understanding that business development and trade associations on the Island can discuss and pursue collaboration that is mutually beneficial.

V. Conclusion

It seems appropriate for the SICOC to want to establish a quality training and education institute that serves its business community. There are many ways to approach such an initiative, but there are also important things the Chamber should consider before it pursues this undertaking—the financial feasibility of such a venture, actual training needs across industries on Staten Island, the potential for collaboration among competing entities. Fortunately, because of the Chamber's already extensive involvement in the community, its alliance with business associations and development programs, and its networking clubs and events, it is in a prime position to test some of its ideas and develop them over time.