



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**ECONOMIC DEVELOPMENT AND INDUSTRY SECTOR (EDIS) COMMITTEE MEETING**

**Thursday, December 11, 2008**

**8:00 A.M.**

South Florida Workforce Investment Board Headquarters

7300 Corporate Center Drive

5th Floor - Conference Room 3

Miami, Florida 33126

**AGENDA**

1. Call to Order and Introductions
2. Approval of EDIS Committee Meeting Minutes
  - A. December 6, 2007
  - B. February 7, 2008
  - C. June 5, 2008
  - D. October 2, 2008
3. Recommendation as to the Approval of Revised ITA Policy
4. Recommendation as to the Approval of New Training Agents and New Programs for Approved Training Agents
5. Discussion - Employed Worker Training Program (EWTP)
6. Informational - National Emergency Grant

South Florida Workforce Investment Board is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.



2.A

**SFWIB - Economic Development and Industry Sector Committee**

*December 11, 2008*

**Minutes of SFWIB Economic Development and Industry Sector Committee Meeting  
December 6, 2007**

South Florida Workforce Investment Board  
 Economic Development and Industry  
 Sector Committee Meeting  
 December 6, 2007, at 8:00 A.M.  
 South Florida Workforce Investment Board Headquarters  
 7300 Corporate Center Drive, 5th Floor - Conference Room 3

<b>COMMITTEE MEMBERS IN ATTENDANCE</b>	<b>COMMITTEE MEMBERS <u>NOT</u> IN ATTENDANCE</b>	<b>OTHER ATTENDEES</b>
1. Andre (Andy) Perez 2. Bill Diggs 3. Thomas Roth 4. Monica Russo 5. Holly Weidman  <b>OTHER SFWIB MEMBERS IN ATTENDANCE</b>	6. Joe Chi 7. Maria Cristina Regueiro 8. Gregg Talbert  <b>SFW STAFF</b> Beasley, Rick Glancy, Anne Hernandez, Juan Kistner, Ken Pierre, Linda	Cartwright, Jerry, <i>Small Business Development Center</i> Costas, Jorge, <i>Youth Co-Op, Inc.</i> Sanchez, Ofelia, <i>Management Resources, Inc.</i>

Agenda items are displayed in the order they were discussed.

**1. Call to Order and Introductions**

Mr. Andy Perez called the meeting to order at 8:25 A.M. and introductions were made. Mr. Perez noted that a quorum was present.

**2. Approval of EDIS Committee Meeting Minutes October 4, 2007**

Bill Diggs moved approval of the minutes of October 4, 2007. The motion was seconded by Thomas Roth and approved.

**10. Recommendation as to an Allocation of Funds to the University of West Florida for a Region 23 Small business Needs Assessment**

Monica Russo moved approval of an allocation of funds to the University of West Florida for a Region 23 small business needs assessment. The motion was seconded by Thomas Roth and approved.

**3. Recommendation as to an Approval of New Programs for Approved Training Agents**

[Holly Wiedman left the room.]

Bill Diggs moved approval of New Programs for Approved Training Agents Technical Career Institute, and Sullivan & Cogliano Training Centers, Inc. The motion was seconded by Holly Wiedman and approved.

[Holly Wiedman returned.]

**4. Recommendations as to an Approval of Employed Worker Training Program Applications**

Thomas Roth moved approval of Employed Worker Training Program applications from Baptist Health South Florida, Inc. and Tim-Bar Corporation dba Tim-Bar Packaging and Display. The motion was seconded by Holly Wiedman and approved.

**5. Employed Worker Training Program (EWTP) Update**

Mr. Beasley noted that there were no new trainings since the last report.

Mr. Perez urged Members to notify Mr. Beasley if they are aware of training needs.

**6. Florida Career and Professional Education (CAPE) Act Discussion**

Mr. Beasley reported that the Florida Career and Professional Education (CAPE) Act, Chapter 2007-216, passed during the 2007 legislative session which ensures career and technical education programs are academically rigorous and relevant to the work place, and it provides a statutory bond between career and technical education and the workforce development system.

He noted that on December 7, 2007, from 9:00 a.m. to 1:00 p.m., SFW is hosting a meeting at the Robert Morgan Educational Center on the Florida Career and Professional Education Act.

Mr. Beasley also noted that the act requires that a strategic 5-year plan be jointly developed between school districts, regional workforce boards and postsecondary institutions and that plan would be reviewed by this Committee.

**7. Annual Recognition Event Discussion**

There was much discussion as to the merits of various recognition events, as well as the need to have the events.

Discussion included: the criteria to select those to be recognized; success stories; showcasing of employees; business leaders bring their leaders; and elevating the SFW brand.

Ms. Russo noted that SFW is a secret, and having participants tell their success stories are the most moving.

Mr. Beasley commented that publicity be arranged when funds are awarded by SFW to an organization. Ms. Wiedman suggested that Mr. Beasley meet with the editorial Board of the Miami Herald.

**8. Workforce Estimating Conference Discussion**

Mr. Beasley reported that as soon as he has a date when the information is due to the State, he would inform the Committee.

**9. Training Reconciliation Discussion**

Mr. Beasley noted that this would be a sub-group to review data to determine if our programs are effective, and to make recommendations to improve where necessary. The group should include one SFW staff person, service providers, training partners, and a Member of this Committee.

Mr. Perez noted that the time commitment would be two to three meetings of an hour each.

Mr. Beasley noted that this would not be a staff driven group. He added that an email message would be sent to request input.

The meeting adjourned at 9:32 A.M.



2.B

**SFWIB - Economic Development and Industry Sector Committee**

*December 11, 2008*

**Minutes of SFWIB Economic Development and Industry Sector Committee Meeting  
February 7, 2008**

South Florida Workforce Investment Board  
 Economic Development and Industry  
 Sector Committee and Workforce Estimating Conference Meeting  
 February 7, 2008, at 8:00 A.M.  
 South Florida Workforce Investment Board Headquarters  
 7300 Corporate Center Drive, 5th Floor - Conference Room 3

<b>COMMITTEE MEMBERS IN ATTENDANCE</b>	<b>COMMITTEE MEMBERS <u>NOT</u> IN ATTENDANCE</b>	<b>OTHER ATTENDEES</b>
1. Andre (Andy) Perez 2. Thomas Roth 3. Monica Russo  <b>OTHER SFWIB MEMBERS IN ATTENDANCE</b> Margolis, Edward Manrique, Carlos	4. Joe Chi 5. Bill Diggs 6. Maria Cristina Regueiro 7. Gregg Talbert 8. Holly Weidman  <b>SFW STAFF</b> Beasley, Rick Glancy, Anne Kistner, Ken Pierre, Linda	Costas, Jose, <i>Youth Co-Op, Inc.</i> Faughaner, Maria, <i>New Professions Technical Institute.</i> Gordon, Barry, <i>Miami Dade College</i> Heit, David, <i>Youth Co-Op, Inc.</i> Mitchell, Carlana, <i>Miami-Dade County Public Schools</i> Ortiz, Ofelia, <i>Total International Career Institute</i> Ramallal, Jose, <i>Compu-Med</i> Sanchez, Ophelia, <i>Management Resources, Inc.</i> Sokolowitz, Vicky <i>Avborne</i> Suarez, Sofia, <i>ATC</i> Zuniga, Veronica, <i>Management Resources, Inc.</i>

Agenda items are displayed in the order they were discussed.

**1. Call to Order and Introductions**

Mr. Andy Perez, Committee Chair, called the meeting to order at 8:21 A.M. and introductions were made. Mr. Perez noted that a quorum had not been achieved.

**2. Approval of EDIS Committee Meeting Minutes of December 6, 2007**

The minutes were not approved due to the lack of a quorum.

**3. Recommendation as to the Approval of New Programs for Approved Training Agents**

Mr. Beasley introduced the item, and noted that Workforce Florida, Inc. and the Agency for Workforce Innovation (AWI) allow each Workforce Region to determine their approved Training

Agents based upon their Region's criteria. The local procedure currently in place, permits training institutions to request approval to become training agents for Educational Scholarships (ITAs) and for current training agents to request the addition of new training programs or facilities. He then directed attention to the attachment which included information regarding the institutions and programs proposed.

Mr. Perez requested, as a Partner of The Academy of South Florida, Inc. that the school's request to add a new program be removed from the list of institutions and programs reflected on the attachment. He noted that a correction must be made to the State by the Academy.

Mr. Margolis asked if the occupations were in demand and Mr. Beasley responded in the affirmative.

Ms. Russo asked why the Nurses Aides and Patient Care Technicians are Temporary Assistance for Needy Families (TANF) only. Mr. Kistner responded that the wage rate under TANF would not be an issue, but under WIA it would become an issue.

Ms. Russo asked why the wage rates are different for the Radiology Technician occupation on the attachment to this item compared to the wage rate on the attachment to the Workforce Estimating Conference item which is next on the agenda. Mr. Kistner responded that the information on the attachment to the Workforce Estimating Conference item is preliminary information for 2008-2009.

Mr. Roth asked why the Dental Lab Technician occupation is to be dropped from the 2008-2009 Targeted Occupations List (TOL). Mr. Kistner explained the reason for the proposed removal. And as of yet no justification information to keep the occupation on the list has been received from the school. Mr. Perez asked that staff contact the school.

Mr. Roth suggested that if an occupation currently on the 2007-2008 TOL, not identified for removal on the 2008-2009 TOL, then SFW should consider it off the list now, as a lame duck.

Mr. Beasley noted that change information to the TOL is due to the State by the 15<sup>th</sup>.

Mr. Margolis asked what would happen if the occupation was not on the list, and Mr. Beasley responded that the person could be enrolled, but SFW would not pay for the training. The participant could find other funds to pay for the training, such as a loan, or a Pell Grant.

Mr. Beasley added that as long as the training began while the occupation was on the TOL, and if later the occupation is no longer on the TOL, the student would be able to continue with SFW.

Mr. Perez noted that information could be received from employers to show that the occupation should remain on the TOL, and the full Board could then request that the occupation remain on the TOL.

Mr. Margolis noted that Career Center providers must meet the wage rate of \$12 per hour and is it viable to have lower paying occupations on the TOL.

Mr. Carlos Manrique noted that the return on our investment must be reviewed in light of a provider requirement of \$12 per hour average wage rate. He suggests that SFW should probably not include any occupations at less than \$11-\$12 per hour.

Mr. Manrique asked if the investment in training is working, and what are the completion rates and job placement rates after training.

Mr. Beasley commented that providers must not "cherry pick" and all customers must be served. The goal is to strive towards occupations that pay \$12 or more per hour. SFW must get jobs for TANF recipients and wages below the \$12 wage-rate must still be included.

Mr. Beasley added that when the final TOL is received, it would be brought back to the Committee.

He added that the completed program review checklists are is included in the agenda as an attachment.

#### **4. Workforce Estimating Conference**

Ken Kistner reported that this second annual Region 23 Workforce Estimating Conference is in response to the release by the State of the Region 23 Preliminary 2008-2009 Targeted Occupations List. The Conference affords the Region the opportunity to request the addition of high-skill/high-wage occupations or other occupations that are important to the Region's or State economy. In addition, it also allows the Region to request the deletion of occupations from the list.

He noted that an occupation must have at least 25 openings a year, a positive growth rate, an entry level wage of \$9.96, and a mean wage of \$12:25. In order to be a high skills/high wages occupation the entry level wage must be \$12.25 and the mean wage \$19.20.

Mr. Kistner reported that eight requests were received to add occupations to the TOL:

- Customer Service Representative
- Major Appliance Technician
- Avionics Technician
- Aircraft Mechanic
- Electrical Powerline Installer
- Producer/Director Program
- Automotive Technicians and Mechanics

Mr. Beasley explained that SFW last year worked very hard to get the Major Appliance Technician occupation back on the TOL, and again it was recommended for deletion.

Mr. Kistner commented that the definition of an opening is very broad.

He also brought to the Committee's attention that some occupations that meet the State criteria but not the Region's criteria may be added to the TOL.

Mr. Beasley noted that the surveys of employers are very important, and the State surveys them as well.

Mr. Roth commented that the data shows the gap between supply and demand for jobs in an area.

Mr. Kistner noted that if the survey is not completed by an employer, then the data is not necessarily complete.

Mr. Manrique added that a past SFW Board Member, Dr. Nora Hernandez-Hendrix considered this process her pet peeve. She and Mr. Beasley worked very hard to try to improve this process.

There was discussion as to the occupational titles and the number of career areas that might be included an occupational title.

Mr. Margolis was of the opinion that airport/transportation jobs were increasing.

Mr. Perez noted that there was consensus of the Committee to submit the information to the State to add the occupations as presented to the TOL.

Mr. Beasley announced that if any information changes the item would be brought to the Board.

[Mr. Manrique left.]

Mr. Kistner presented the request to remove Self Enrichment Teachers that includes such occupations as: Dance Teacher, Tae Kwon Do Instructor, Dive Instructor, etc. from ~~on~~ the TOL.

Mr. Beasley noted that the requested occupations would be submitted for inclusion on the TOL.

#### **5. Employed Worker Training Program (EWTP) Update**

This item was not discussed, as it was an informational item.

Mr. Perez noted that the agenda had been completed, and asked for questions ore comments.

Mr. Beasley briefed the Committee on the *Region 23 State of the Workforce Report* that staff has spent much time preparing. The report includes information on the status of workforce in Miami-Dade and Monroe counties. He added that there is a considerable problem with under education of the population compared to the occupations to be filled.

He added that the un-employment numbers are increasing.

Mr. Perez asked that Ms. Russo and Mr. Roth to put together a breakfast meeting focused on economic development and to include unions, legislators, chambers, and construction.

Mr. Margolis noted that having a breakfast meeting is fine, but the organizations that participate with SFW must be accountable. In addition, realistic goals must be developed for one, two, and three years from now.

The meeting adjourned at 9:55 A.M.



2.C

**SFWIB - Economic Development and Industry Sector Committee**

*December 11, 2008*

**Minutes of SFWIB Economic Development and Industry Sector Committee Meeting June 5, 2008**

South Florida Workforce Investment Board  
 Economic Development and Industry  
 Sector Committee and Workforce Estimating Conference Meeting  
 June 5, 2008, at 8:00 A.M.  
 South Florida Workforce Investment Board Headquarters  
 7300 Corporate Center Drive, 5th Floor - Conference Room 3

COMMITTEE MEMBERS IN ATTENDANCE	COMMITTEE MEMBERS <u>NOT</u> IN ATTENDANCE	OTHER ATTENDEES
1. Andre "Andy" Perez 2. Thomas Roth 3. Maria Cristina Regueiro 4. Holly Weidman  <b>OTHER SFWIB MEMBERS IN ATTENDANCE</b> Margolis, Edward Manrique, Carlos	5. Joe Chi 6. Bill Diggs 7. Monica Russo 8. Gregg Talbert  <b>SFW STAFF</b> Beasley, Rick Glancy, Anne Kistner, Ken Pierre, Linda	Rodriguez, Maria- <i>Youth Co-Op, Inc.</i>

Agenda items are displayed in the order they were discussed.

**1. Call to Order and Introductions**

Mr. Andy Perez, EDIS Committee Chair, called the meeting to order at 8:20 A.M. and introductions were made. Mr. Perez noted that a quorum had not been achieved.

**2. Approval of EDIS Committee Meeting Minutes of December 6, 2007, and February 7, 2008**

The minutes were not approved due to the lack of a quorum.

**3. Employed Worker Training Program (EWTP) Update**

**3A. 2007/2008 Update**

Executive Director, Rick Beasley, updated the members on the Employed Worker Training Program. He noted that approximately \$300,000 was spent of the \$800,000 that was budgeted. He explained that the funds were held in anticipation of a funding rescission, and to prevent affecting provider contracts. Even with that, more people at a lower cost per rate were trained compared to last year.

The State has since absorbed the full amount of the rescission, which allows us to carry forward funds. It is anticipated that SFW new funding would be reduced by \$4Million.

**3B. 2009/2009 Allocation Discussion**

Mr. Beasley noted the importance of allocating-funds for the EWT program since it helps to raise the region's wage rates.

Mr. Perez noted that 2,000 employees were trained during a six month period.



Mr. Beasley indicated that if the Beacon Council could decide that certain skill sets are necessary for SFW participants to become job-ready, SFW could then use EWT funds to upgrade those skill sets.

He added that SFW may not use EWT funds for “soft” skills training, but a certification program could be devised at the recommendation of an organization such as the Beacon Council to include necessary skills. This requires written policies by SFW so that providers may be reimbursed for their expenditures.

Ms. Wiedman noted that the Beacon Council was ready to talk about aviation.

Mr. Beasley noted that the service strategy for Monroe County must be revised since EWT is the most beneficial program given their population, and there is a need for training in the “soft” skills.

Ms. Maria Rodriguez noted that there are not many training agents in Monroe County.

Mr. Perez noted that the EWT program has had another benefit because it opened the door for our providers to work with local businesses and corporations and to develop a continuing relationship.

Mr. Roth asked what the guidelines are or should be. Mr. Beasley suggested that the Committee could recommend that a certain percentage of funding could be put into EWT. Mr. Perez asked for a recommendation to take to the Finance Committee.

Mr. Perez noted that EWT is currently funded at 10 percent and asked whether that amount should be maintained, or increased? The Committee could recommend that the policy be for an example, a 10%-15% range of funding, for EWT. Mr. Roth offered that a range of 10%-15% would be a good start.

Mr. Beasley reported that the health, construction, and retail areas are using primarily ITAs. He added that SFW must work with the large local hospitals such as Mercy, and Ms. Regueiro could assist in that effort.

Mr. Perez explained the process for Individual Training Accounts (ITA) and that the applications are reviewed by SFW staff.

Mr. Beasley explained that industry specific certifications could be given for skills determined to be necessary by an association, such as the Beacon Council. Ms. Weidman suggested that a meeting be scheduled on this issue with SFW staff and the 12 staff persons who work with companies for the Beacon Council.

Mr. Beasley noted that SFW would focus on certain industries using the strategic plan as a guideline.

#### **4. Small Business Development Center (SBDC) Update**

Mr. Beasley reviewed the highlights of the DRAFT *Business Needs Assessment of Miami-Dade and Monroe Counties, April 2008* prepared for SFW by Florida’s SBDC Network, State Director’s Office, May 6, 2008.

He added that CAMACOL receives a direct allocation from the state, and is able to fund only half of the cost of providing a home for the SBDC. CAMACOL has asked if SFW could fund the balance. The survey of local small businesses was requested in order to determine the role that SFW might fulfill-

#### **5. State of the Workforce Event Follow-up – Action Plan**

Mr. Beasley thanked board members, Tom Roth, and Andy Perez, for their sponsorship of the event in partnership with Mayor Alvarez. He noted that Holly Weidman was unable to attend as a panelist due to travel problems.

Mr. Beasley noted that a plan of action must be prepared for ways to enhance workforce services within the county. One suggestion from the event was to identify permanent funding streams to prevent a dependency on only state and federal funds. There was also a discussion of ways to generate funding to retain companies in the region.

Mr. Beasley suggested that businesses be assessed 0.5%, and then receive a 0.5% reduction in their tax payment.

Mr. Perez commented that the committee and SFW would begin the process and that it would take some time to get Commission approval. He added that suggestions are requested from this Committee.

Mr. Perez asked whether meetings should be scheduled with industry, Miami-Dade County and the chambers to identify the barriers, and the solutions.

Mr. Perez requested a report on the use of the mobile units including where they have been used and for what events. Mr. Roth asked what services are provided by the mobile units, and Mr. Beasley responded that the mobile units are able to provide full services. Mr. Perez noted that in the event of a company closing and having to lay off staff, the mobile units can go to the company to assist the employees.

Mr. Beasley reported that the meeting of the US Conference of Mayors was to meet in Miami, June 20<sup>th</sup>-24<sup>th</sup>, and asked members for their support.

The meeting adjourned at 9:41 A.M



**2.D**

**SFWIB - Economic Development and Industry Sector Committee**

*December 11, 2008*

**Minutes of SFWIB Economic Development and Industry Sector Committee Meeting  
October 2, 2008**

South Florida Workforce Investment Board  
 Economic Development and Industry  
 Sector Committee and Workforce Estimating Conference Meeting  
 October 2, 2008, at 8:00 A.M.  
 South Florida Workforce Investment Board Headquarters  
 7300 Corporate Center Drive, 5th Floor - Conference Room 3

<b>COMMITTEE MEMBERS IN ATTENDANCE</b>	<b>COMMITTEE MEMBERS <u>NOT</u> IN ATTENDANCE</b>	<b>OTHER ATTENDEES</b>
1. Andre “Andy” Perez 2. Thomas Roth 3. Maria Cristina Regueiro 4. Monica Russo  <b>OTHER SFWIB MEMBERS IN ATTENDANCE</b> Margolis, Edward	5. Joe Chi 6. Bill Diggs 7. Gregg Talbert 8. Holly Weidman	None  <b>SFW STAFF</b> Garcia, Karla Glancy, Anne Hernandez, Juan Kistner, Ken Parodi, Silvio Pierre, Linda Smith, Marian

Agenda items are displayed in the order they were discussed.

**1. Call to Order and Introductions**

Mr. Andy Perez, Committee Chairperson, called the meeting to order at 8:20 A.M. and introductions were made. Mr. Perez noted that a quorum had not been achieved.

**2. Approval of EDIS Committee Meeting Minutes of December 6, 2007, and February 7, 2008**

The minutes were not approved due to the lack of a quorum.

**3. SBDC Small Business Assessment Report**

Mr. Perez commented that Mr. Jerry Cartwright was not able to present, and added that he requested that Mr. Cartwright, of the Florida Small Business Development Center (SBDC) be invited to attend the meetings of CAMACOL and the Beacon Council.

Mr. Perez added that the item should be forwarded to the full Board.

**4. Employed Worker Training Program (EWTP)**

Mr. Perez reported that the EWT program had been on hold pending the expected funding rescission, but there has been some success. Ms. Maria Cristina Regueiro had some questions, such as:

Did the average wage for the trainee increase after completing the training?  
Was the trainee promoted to a higher paying job after completing the training?  
Is EWT to increase wages of employees, or to subsidize the employers

Mr. Perez noted that the EWT program is to enable employees to move up in their organization/company. Mr. Perez also added that the original wage rate as well as the final wage rate be included on the report. Mr. Roth noted that the EWT program is a subsidy for targeted industries to raise the skill levels of their employees. Mr. Margolis commented that the program is important for career laddering. Ms. Monica Russo asked if more value could be attained. Mr. Perez asked that a column be added to the report of the results/benefit to SFWIB. Mr. Margolis added that the benefits outweigh the concerns.

Mr. Perez commented that how we do business is being revamped to stop wasteful spending regarding the TOL.

Mr. Perez noted that as there is no quorum, the consensus is to move the item to the full Board.

**5. Recommendation as to the Approval of New Programs for Approved Training Agents**

There was conversation regarding the TOL. It was noted that the TOL is expected to be received from the State in February, at which time the Estimating Conference could be scheduled. The discussion continued as to the fastest growing occupations, and new legislation regarding paralegals and a new certification requirement.

**7. Individual Training Accounts (ITAs) Report**

Mr. Perez noted that the training providers had many questions, such as the steps taken due to the downturn in the economy; requests for a handout to of the past three (3) years; possibility of setting a cap on funds to be approved for certain occupations; a report of the cost per program.

The training providers will meet again and will consider shorter trainings; not paying for the entire training; and ways to fund the balance of the training.

It was also noted that SFWIB must ensure that the training provided actually benefits, not just that the provider receives payment; and work to reduce the TOL to focus spending wisely; require more accountability by the schools.

It was noted that becoming successful in a few industries could be used as a model to build from and SFWIB must listen to business rather than education.

Concern was expressed that the data in SAMS was not reliable and it was recommended that a monthly reconciliation of trainee status be received from the provider by the 30<sup>th</sup> of each month.

**6. Digital Skills Workgroup**

Mr. Perez noted that this item would be moved to the next meeting.

The meeting adjourned at 9:48 A.M



3.

**SFWIB - Economic Development & Industry  
Sector (EDIS) Committee**

***December 11, 2008***

**Approval of Revised Individual Training  
Account Policy**

**RECOMMENDATION**

SFWIB staff recommends the approval for the attached draft revised SFWIB ITA Policy, as set forth below.

**BACKGROUND**

Individual Training Accounts (ITAs) are used to provide training services to eligible SFWIB customers. The training must be in an occupation on the Region's Targeted Occupations List (TOL) and is used to defray the cost of the training at an approved SFWIB Training Vendor.

The current ITA Policy provides for the following:

1. The maximum ITA Cap is \$10,500 per program.
2. ITAs cover the cost of training for A.S. Degree and Certificate/Diploma programs.
3. ITAs could be used for Bachelor Degree Programs on a case-by-case basis by paying for up to \$2,500 per year for tuition or books and allowed for up to five years to complete.
4. Each occupation has a an ITA fee which includes all associated training costs, i.e. tuition, books, registration fees, testing fees, etc. The baseline ITA cost is for each occupational training area is based on the overall price information of the public educational institutions that are on the Region's approved ITA list and uses the highest of these fees to establish the baseline ITA fee. To enable the private educational institutions the ability to participate a 10% ceiling above the baseline price was established as the maximum allowable ITA fee for the occupational training area.

The current ITA Policy limits the funding available for new SFWIB customers to participate in training services. SFWIB staff has been working with the Service and Training Partners on a revised ITA Policy for the Region and have developed the attached draft revised SFWIB draft ITA policy. In addition, other Region's in the State were contacted to determine their ITA policy, which is detailed in the attached chart.

This policy revises the current policy as follows:

1. Decreases the maximum cap for the Individual Training Account (ITA) to \$7,500.00.
2. Establishes the ITA amount for each occupational training area based on if an occupation is identified as High Wage/High Growth, High Wage/Low Growth, Low Wage/High Growth, and Low Wage/Low Growth, as follows:
  - Occupations identified as High Wage/High Growth **up to** \$7,500.00
  - Occupations identified as High Wage/Low Growth **up to** \$5,625.00
  - Occupations identified as Low Wage/High Growth **up to** \$3,750.00
  - Occupations identified as Low Wage/Low Growth **up to** \$1,875.00
3. Establishes a time limit by adding that Individual Training Accounts can only be used to cover the cost of **up to** one year of training, which is tuition.
4. Removes the use of ITA for Bachelor Degree programs.

*Attachments*

<b>RWB</b>	<b>WIA ITA Maximum Cap</b>	<b>WIA Support Services Cap</b>	<b>WT ITA Maximum Cap</b>	<b>WT Support Services Cap</b>
<b>1</b>	\$5,000	-	-	\$3,500
<b>2</b>				
<b>3</b>				
<b>4</b>				
<b>5*</b>	\$5,000	\$1,000	\$5,000	\$1,000
<b>6</b>				
<b>7</b>				
<b>8</b>	\$6,000	-	\$6,000	-
<b>9</b>				
<b>10</b>	Funding Limit - not to exceed published in-state tuition at a local public institution	No minimum or max handled case-by-case	Funding Limit - not to exceed published in-state tuition at a local public institution	No minimum or max handled case-by-case
<b>11</b>				
<b>12</b>	Tier 1 - \$3,000 Tier 2 - \$5,000	-	Tier 1 - \$3,000 Tier 2 - \$5,000	\$800
<b>13</b>				
<b>14</b>	\$3,500	\$500	\$3,500	\$500
<b>15</b>	\$5,000	\$50 maximum per month	\$5,000	\$60 maximum per month
<b>16</b>	\$1,500	\$800	\$1,500	\$800
<b>17</b>				
<b>18</b>				
<b>19**</b>	\$2,500	**	\$2,500	**
<b>20***</b>	Tier 1 - \$2,500 Tier 2 - \$5,000 Tier 3 - \$7,500	\$1,000	Tier 1 - \$2,500 Tier 2 - \$5,000 Tier 3 - \$7,500	\$1,000
<b>21</b>				
<b>22</b>	\$6,000	\$2,500	\$6,000	\$2,500
<b>23</b>				
<b>24</b>	\$6,500	\$3,000	-	\$2,000

Region 5\* - Lifetime limit

Region 19\*\* - Support Service caps are related to services provided.

Region 20\*\*\* -Lifetime limit for training is \$7,500.00.

**DRAFT**  
**INDIVIDUAL TRAINING ACCOUNT (ITA) POLICY**  
**SFWIB #PY' \_\_\_ - \_\_\_\_**

**I. Of Interest to**

The Individual Training Account (ITA) Policy should be of interest to members of the South Florida Workforce Investment Board (SFWIB), Region 23 Career Center contractors, training vendors, job seekers in Miami-Dade and Monroe counties, and South Florida Workforce Investment Board (SFWIB) staff.

**II. Subject**

Training utilizing Individual Training Accounts

**III. Purpose**

The purpose of the Individual Training Account (ITA) Policy is to provide all SFWIB stakeholders with parameters regarding the use of training funds utilizing Individual Training Accounts (ITA).

**IV. Background**

An Individual Training Account (ITA) is a vehicle through which SFWIB can expend training dollars. An ITA may be used to help pay for or defray the cost of training at an approved SFWIB training vendor. An ITA can be used to provide training in an occupation clearly linked to a priority industry that is in local demand or that appears on the Region's Targeted Occupations List (TOL). An ITA is available to customers eligible for WIA Adult, Dislocated Workers, Youth and Welfare Transition program; however it is not an entitlement. The document that is used for an ITA is a voucher.

**V. Individual Training Account Fee Structure**

A. Individual Account Training Cap:

The maximum cap for the Individual Training Account (ITA) is \$7,500.00.

B. ITA Amount for Occupational Training Areas:

The ITA amount for each occupational training area is based on if the occupation is identified as High Wage/High Growth, High Wage/Low Growth, Low Wage/High Growth, and Low Wage/Low Growth.

The maximum ITA amounts are as follows:

- Occupations identified as High Wage/High Growth **up to** \$7,500.00
- Occupations identified as High Wage/Low Growth **up to** \$5,625.00
- Occupations identified as Low Wage/High Growth **up to** \$3,750.00
- Occupations identified as Low Wage/Low Growth **up to** \$1,875.00

The benchmark to determine whether an occupation is high wage/high growth, low/wage growth, etc is based on the State of Florida LMI data for the fastest growing occupations within Region 23 by growth rate and salary rate. The average growth rate and average salary rate will be determined for the identified occupations.

The occupations are sorted accordingly by growth rate and average salary and placed in the appropriate category.

For the current program year (PY2008-2009) the average growth rate was determined to be 2.6% and the average annual wage was \$43,434 or \$20.88 per hour.

The benchmark to determine whether an occupation is high wage/high growth, low/wage growth, etc will be calculated every year based on the fastest growing occupations identified by the State's LMI data within Region 23 to determine the average growth rate and average salary rate for the fastest growing occupations.

**VI. Duration of Training for Individual Training Accounts**

Individual Training Accounts can only be used to cover the cost of **up to** one year of training, which is tuition.

If the SFWIB customer's tuition cost is covered by another funding source, for example Pell Grants or scholarships, the ITA may be used to offset the costs of books, certification examination/testing fees, etc for up to eighteen months.-

SFWIB customers that elect to go to training that is more than one year in length, i.e. an A.S Degree program, will be responsible for all training costs beyond the one year that may be covered by the ITA.

SFWIB customers that elect to attend training that is less than one year in length will only have that training covered.

Associate of Arts (A.A. Degree) and Bachelor Degree programs are not covered by the Individual Training Account.

## **VII. Financial Aid**

### **A. PELL Grants**

All SFWIB customers requesting training using an ITA are required to apply for the Pell Grant (Title IV) by completing the Free Application for Student Aid (FASA).

SFWIB customers pending PELL Grant approval/award may be enrolled in training through an ITA voucher. If subsequently awarded, the Pell Grant proceeds will be applied towards the tuition costs, with the ITA paying only for costs in excess of the PELL Award. In the case that the PELL award covers the cost of the training, the training vendor will reimburse SFWIB the amount of tuition paid by SFWIB.

### **B. Other Financial Aid/Student Loans**

If an SFWIB customer has another grant or scholarship, the ITA funds will be available only after the other grant or scholarship has been utilized.

SFWIB customers that elect to attend training programs may be required to obtain student loans and/or other grants to cover the cost of the program that they wish to enroll in if the ITA amount and the Pell Grant, if eligible for Pell, does not cover the full cost of the program. If the SFWIB customer is not Pell eligible, or the school or program is not Title IV eligible, the SFWIB customer will be required to obtain student loans and/or other financial aid to cover the cost of the program not covered by the ITA amount. SFWIB will not be responsible for any debts that an SFWIB customer incurs.

## **VIII. ITA Payment**

A. For schools and programs that operate on a term or similar basis, the ITA will be written on a term-by-term basis, with renewal per term based on satisfactory performance, that is:

1. Remain in good academic standing (not on academic probation), and
2. Show progress in completing their pre-approved or amended Career & Training Plans.

B. For schools and programs that operate on a shorter term basis, the ITA will be written upfront.

## **IX. Limitations**

A. Only one training occupation per SFWIB customer can be paid through the ITA.

B. The SFWIB customer must enroll in school **half-time or full time** as defined by the training vendor.

C. The ITA can only be used for courses that are specifically required for the program of study

D. SFWIB will only pay once for each required class in an approved training program.

E. SFWIB will only pay once for each required certification examination.

F. In the case of those occupational training areas where the State licensing and/or certification examinations are offered only in the English language, SFWIB customers enrolled in the



training must shall be taught in English.

G. Associate of Arts (A.A. Degree) and Bachelor Degree programs are not covered by the Individual Training Account.

**X. Service Account Management System (SAMS)**

Approved SFWIB Training Vendors shall utilize the SFWIB SAMS Training Vendor screen to submit information on training status (drop, withdrawals, PELL information, etc), attendance, training progress, placement, credential attainment information and performance information on an ongoing basis. The Training Vendor will provide credential information to the service provider and any follow-up data required.

Service Provide case managers shall track SFWIB customer training performance through SAMS.

**XI. Training Vendor Performance**

Training Vendors that agree to accept ITAs from SFWIB will be required to meet SFWIB Performance standards. These standards are:

Performance Measure	Performance Standard
Training Completion Rate	70%
Placement After Training	70%
Training Related Placements	70%

1. Training Completions Rate:

This measure consists of those SFWIB customers who enrolled in training with an enrollment end date and have attained a credential or completed training divided by the number of SFWIB Customers enrolled in training with an enrollment end date during the reported period.

The data on the completion of the training is collected and analyzed using SAMS. The information is obtained from Career Center or Training Agents' module.

2. Placement after Training:

This measure consists of those SFWIB customers who completed training in SAMS and have been placed within three months of training completion divided by the number of SFWIB customers who completed training during the reported period.

The data on the completion of the training is collected and analyzed using SAMS. The placement information is obtained from EF and OSST systems.

3. Training Related Placements:

This measure consists of those SFWIB customers who completed training and obtained employment and have been placed in a training related occupation divided by the number of SFWIB customers who completed training and were placed during the reported period.

The training completion and training occupational codes are collected and analyzed using SAMS. The placement information and occupational codes (O\*Net) codes are obtained from EF and SAMS systems. The O\*Net codes are used to map the training occupations with the placement occupations.



4.

**SFWIB - Economic Development & Industry Sector (EDIS) Committee**

*December 4, 2008*

**Recommendation as to the Approval of New Training Agents and New Programs for Approved Training Agents**

**RECOMMENDATION**

SFWIB staff recommends the approval for the new training vendors and new training programs for approved Region 23's Training Agents, as set forth below and in the attached table.

**BACKGROUND**

Workforce Florida, Inc. and the Agency for Workforce Innovation (AWI) allow each Workforce Region to determine their approved Training Agents based upon their Region's criteria. The local procedure currently in place, permits training institutions to request approval to become training agents for Educational Scholarships (ITAs) and for current training agents to request the addition of new training programs or facilities.

For request to become an approved SFWIB Training Vendor, this process requires SFWIB staff to review programmatic and fiscal capabilities for agencies that are not currently approved by SFWIB. For those existing approved Training Agents requesting new training programs, this process requires staff to review programmatic capabilities. Upon approval by SFWIB, the recommendations are entered into the State of Florida Eligible Training Provider List (ETPL).

ATI Enterprises, Inc. (ATI Career Training Centers and ATI College of Health), Professional Training Centers, Inc. and Florida Education Institute, Inc. submitted requests to become approved SFWIB Training Vendors. In addition, Everest Institute and South Florida Career Institute, Inc. submitted a request to add new programs to their list of approved offerings.

The attached Table 1 sets forth the reviewed requests and SFWIB staff recommendation.

*Attachment*

**Summary of Training Institutions Reviews**

NEW SCHOOL REQUESTS									
Training Institution	Proposed Training Program(s)	Program Length	Total Program Cost	Maximum ITA Amount (Current ITA Structure)	Pell Eligible	2008-2009 TOL			Comments
						Related Occupations	Wage Rate		
							Entry	Mean	
ATI - 3 campuses and 1 branch,	A.A.S. and A.S. Degree: Respiratory Therapy	2 years	\$ 37,500.00	\$ 10,500.00	Yes	Respiratory Therapist (SOC 291126)	\$ 17.43	\$ 23.04	Programmatic and Due Diligence reviews were conducted. ATI met all requirements. SFWIB staff recommends approval
	A.A.S. Degree: Diagnostic Ultrasound Technician	2 Years	\$ 37,500.00	\$ 10,500.00	Yes	Diagnostic Medical Sonographer (SOC 292032)	\$ 21.25	\$ 27.37	
	Occupational Associate Degree (OAD) Degree: Air Conditioning, Heating, Refrigeration & Appliances	16 months	\$ 15,875.00	\$ 8,642.00	Yes	Heating, AC, & Refrigeration Mechanic & Installers (SOC 499021)	\$ 12.20	\$ 17.18	
	Occupational Associate Degree (OAD) Automotive Service Technician	16 months	\$ 19,500.00	\$ 6,793.00	Yes	Automotive Service Technicians (SOC 493023)	\$ 10.44	\$ 16.90	
	Occupational Associate Degree (OAD) Degree: Network Administration	16 Months	\$ 17,500.00	\$ 9,915.00	Yes	Computer & Information System Manager (SOC 11302)	\$ 33.04	\$ 48.21	
						Computer Support Specialist (SOC 15104-1)	\$ 13.34	\$ 19.50	
						Network & Computer Systems Administrator (SOC151071)	\$ 22.52	\$ 33.13	
	Diploma Program: Air Conditioning, Heating, Refrigeration & Appliances	12 months	\$ 15,000.00	\$ 4,240.00	Yes	Heating, AC, & Refrigeration Mechanic & Installers (SOC 499021)	\$ 12.20	\$ 17.18	
	Diploma Program: Automotive Service Technician	12 months	\$ 18,000.00	\$ 5,640.00	Yes	Automotive Service Technicians (SOC 493023)	\$ 10.44	\$ 16.90	
	Diploma Program: Business Administration Technology	10 months	\$ 12,000.00	\$ 5,121.00	Yes	Compensation, Benefits & Jobs Analysis Specialist (SOC 131071)	\$ 16.26	\$ 24.02	
						Computer & Information Systems Manager (SOC 13021)	\$ 33.04	\$ 48.21	
						Employment, Recruitment & Placement (SOC 131071)	\$ 14.31	\$ 22.26	
						General & Operations Manager (SOC 111021)	\$ 28.63	\$ 54.42	
						Marketing Manager (SOC 112021)	\$ 30.75	\$ 53.97	
Property Real Estate and Community Association Manager (SOC 119141)						\$ 15.22	\$ 29.82		
Public Relations Specialist (SOC 273031)						\$ 15.50	\$ 23.73		
Real Estate Sales Agent (SOC 419022)						\$ 10.13	\$ 24.20		
Diploma Program: Medical Assisting Technology	10 months	\$ 11,750.00	\$ 5,622.00	Yes	Medical Assistants (SOC 319092)	\$ 10.02	\$ 13.21		
Diploma Program: Medical Administrative Assisting Technology	7 months	\$ 8,500.00	\$ 4,789.00	Yes	Medical Secretaries (SOC 436013)	\$ 10.15	\$ 14.71		

**Summary of Training Institutions Reviews**

<b>Professional Training Center</b>	OAD Program: Diagnostic Medical Sonography (CIP 0317021202)	1,982 Clock Hours (127.5 Quarter Credits) 24.7 months	\$ 26,370.25	\$ 10,500.00	Yes	Diagnostic Medical Sonographers (SOC 292032)	\$ 21.25	\$ 27.37	Programmatic and Due Diligence reviews were conducted. Professional Training Center met all requirements. SFWIB staff recommends approval
	OAD Program: General Radiologic Technology (CIP 0317020904)	2,192 Clock Hours (137.5 Quarter Credits) 27.4 months	\$ 28,394.78	\$ 8,901.00	Yes	Radiologic Technologists & Technicians (SOC 292034)	\$ 17.70	\$ 24.77	
<b>Florida Education Institute</b>	Diploma Program: Medical Assistant	730 Clock Hours (9 months)	\$ 13,025.00	\$ 5,622.00	Yes	Medical Assistants (SOC 319092)	\$ 10.02	\$ 13.21	Programmatic and Due Diligence reviews were conducted. Florida Education Institute met all requirements. SFWIB staff recommends approval
	Diploma Program: Medical Coding & Billing	720 Clock Hours (9 months)	\$ 11,990.00	\$ 4,789.00	Yes	Medical Records & Health Information Technicians (SOC 29207)	\$ 10.00	\$ 14.71	

**NEW PROGRAMS - CURRENT TRAINING VENDORS**

<b>Everest Institute- 3 campuses</b>	<b>A.S. Degree Program: Business Administration</b>	24months	\$ 35,890.00	\$ 8,670.00	Yes	Compensation, Benefits & Jobs Analysis Specialist (SOC 131072)	\$ 16.26	\$ 24.02	Programmatic review was conducted. Everest met the programmatic review requirements. SFWIB staff recommends approval
						Computer & 7 Information Systems Manager (SOC 13021)	\$ 33.04	\$ 48.21	
						Employment, Recruitment & Placement (SOC 131071)	\$ 14.31	\$ 22.26	
						General & Operations Manager (SOC 111021)	\$ 28.63	\$ 54.42	
						Marketing Manager (SOC 112021)	\$ 30.75	\$ 53.97	
						Property Real Estate and Community Association Manager (SOC 119141)	\$ 15.22	\$ 29.82	
						Public Relations Specialist (SOC 273031)	\$ 15.50	\$ 23.73	
						Real Estate Sales Agent (SOC 419022)	\$ 10.13	\$ 24.20	
						Social & Community Services Manager (SOC 119151)	\$ 19.72	\$ 31.29	
						<b>A.S. Degree Program: Criminal Justice</b>	24 months	\$ 35,890.00	
Police and Sheriff's Patrol Officers (SOC 333051)	\$ 20.57	\$ 28.39							
<b>South Florida Career Institute</b>	Diploma Program: Paralegal Assistant	900 Clock Hours (22 weeks)	\$ 10,375.00	\$ 6,749.00	No	Paralegals & Legal Assistants (SOC 232011)	\$ 12.73	\$ 20.78	Programmatic review was conducted. South Florida Career Institute met all requirements. SFWIB staff recommends approval
	Diploma Program: Medical Secretary/Dental Front Office (CIP 0507060503)	420 Clock Hours (10 weeks)	\$ 6,125.00	\$ 3,917.00	No	Medical Secretaries (SOC 436013)	\$ 10.15	\$ 14.71	
	Diploma Program: NCLEX Examination Review for RN/LPN Professionals of Other Countries	600 Clock Hours (15 weeks)	\$ 8,325.00	\$ 5,591.00	No	Registered Nurses (SOC 291111) Licensed Practical and Licensed Vocational Nurses (SOC 292061)	\$ 22.68 \$ 14.67	\$ 31.24 \$ 18.84	

**SCHOOL PROGRAMMATIC REVIEW CHECKLIST**

Institution Name: ATI – 3 campuses and 1 Branch New School XX New Program(s) \_\_\_\_\_

Date: 4/29/2008 – 4/30/2008 Updated: October 9, 2008

	<b>PROGRAMMATIC REVIEW AREAS</b>	<b>(Yes/No /N/A)</b>	<b>COMMENTS</b>
1.	School's Licensing Information.	YES	ATI 4 locations in South Florida are licensed by the State of Florida/DOE/Commission for Independent Education (CIE).
	Accreditation Information, if applicable.	Yes	All ATI locations are accredited by the Accrediting Commission of Career Schools and Colleges of Technology (ACCSCT). In addition, ATI College of Health in Miami is also accredited by the Committee on Accreditation for Respiratory Care (CoARC).
2.	School's enrollment information.	YES	<p>ATI's total enrollment as of April 18, 2008 was 2,119 (both day &amp; evening) for all locations in Broward and Miami-Dade Counties. Enrollment by locations is as follows:</p> <ol style="list-style-type: none"> <li>1. ATI Career Training Center: School # 3114 - Fort Lauderdale, FL - 199 students</li> <li>2. ATI Career Training Center: School # 3115 – Oakland Park, FL - 445 students</li> <li>3. ATI Career Training Center: School # 3117 – Miami, FL - 398 students</li> <li>4. ATI College of Health: School # 3116 – Miami, FL – 1077 students</li> </ol> <p><u>Updated Enrollment Information:</u> ATI's total enrollment as of October 8, 2008 was 2,678 (both day &amp; evening) for all locations in Broward and Miami-Dade Counties. Enrollment by locations is as follows:</p> <ol style="list-style-type: none"> <li>1. ATI Career Training Center: School # 3114 - Fort Lauderdale, FL - 304 students</li> <li>2. ATI Career Training Center: School # 3115 – Oakland Park, FL - 643 students</li> <li>3. ATI Career Training Center: School # 3117 – Miami, FL - 626 students</li> <li>4. ATI College of Health: School # 3116 – Miami, FL – 1105 students</li> </ol>
3.	Training Program/Design – Per training program.	Yes	<p><b>A.S. Degree Program:</b></p> <ol style="list-style-type: none"> <li>1. Diagnostic Ultrasound Technician (CIP 0317021300) or (CIP317021200) 24 months</li> <li>2. Respiratory Therapy (CIP 0317081800)- 24 months</li> </ol> <p><b>OAD Programs:</b></p> <ol style="list-style-type: none"> <li>3. Air Conditioning, Heating Refrigeration &amp; Appliances (CIP 0647020101) – 16 months</li> <li>4. Automotive Service Technician (CIP 0647060400)- 16 months</li> <li>5. Network Administration (CIP 0507030609) – 16 months</li> </ol> <p><b>Certificate Programs:</b></p>

			<p>6. Medical Assisting Technology (CIP 0317050300) - 10 months/40 weeks</p> <p>7. Medical Administrative Assisting Technology (CIP 0507060502) - 7 months//30 weeks.</p> <p>8. Air Conditioning, Heating Refrigeration &amp; Appliances (CIP 0647020101) 11 months</p> <p>9. Automotive Service Technician (CIP 0647060400) 12 months</p> <p>10. Business Administration Technology (CIP 0507040102) 10 months</p>
4.	Curriculum per training area requested. Affiliation Agreements, if applicable.	Yes	Full curricula were available and reviewed. Lesson plans developed and instructional objectives and strategies were incorporated. Affiliation Agreements in place for required programs.
5.	Instructional staffing.	Yes	Resumes, CIE Instructional and Administrative Personnel Forms were provided for instructional staff.
6.	Facility.	Yes	<p>ATI has two campuses in Broward County and one campus and a branch in Miami-Dade County. ATI's Fort Lauderdale campus is comprised of two standalone buildings located on NW 62<sup>nd</sup> Street and occupies approximately 25, 000 sq ft of space (13 classrooms and 4 labs)</p> <p>ATI's Oakland Park campus is two standalone buildings land occupies approximately 25,000 sq feet of space (6 Classrooms and 11 Labs).</p> <p>ATI's Career Center located at 7625 NW 25<sup>th</sup> Street, Miami is a 30,000 sq foot facility. (13 classrooms and 5 labs).</p> <p>ATI's College of Health, located at 1395 NW 167 Street, Miami, is housed in two locations in an office complex and is approximately 16,000 square feet (8 classrooms, 5 labs). This campus will be moving to a new facility, within the same complex they are currently located in.</p>
7.	Equipment, training aids, books and other instructional material.	Yes	Inventory provided. All equipment maintained and in good working order. Books and materials are on hand.
8.	Placement information. Licensing or Certification rate, if applicable.	Yes	Provided Annual Reports for 2006 and 2007 required by ACCSCT. Performance varies from campus to campus and by the programs offered. The placement rate for all programs: reported was 78.4% with a 94.2% training related placement rate.
9.	Staff job development/placement information.	Yes	Resumes provided for the staff responsible for placement assistance.
10.	Additional staffing capabilities, i.e. counseling, case management, etc.	YES	Resumes of other staff provided.
11.	Cost data per training program.	Yes	<p>ATI's Total Program cost:</p> <p><b>A.S. Degree Program:</b></p> <p>1. Diagnostic Ultrasound Technician : \$37,500.00</p> <p>2. Respiratory Therapy : \$37,500.00</p> <p><b><u>OAD Programs:</u></b></p> <p>3. Air Conditioning, Heating Refrigeration &amp; Appliances:</p>

			<p>\$15,875.00</p> <p>4. Automotive Service Technician: \$19,500.00</p> <p>5. Network Administration: \$17,500.00</p> <p><b>Certificate Programs:</b></p> <p>6. Medical Assisting Technology: \$11,750.00</p> <p>7. Medical Administrative Assisting Technology: \$8,500.00</p> <p>8. Air Conditioning, Heating Refrigeration &amp; Appliances :\$15,000.00</p> <p>9. Automotive Service Technician: \$18,000.00</p> <p>10. Business Administration Technology: \$12,000.00</p>
12.	Financial Aid Information.	Yes	<p>ATI is a Title IV eligible school. The School participates in the Federal Pell Grant Program, as well as other loan programs such as: Federal Stafford Subsidized and Federal Stafford Unsubsidized Loans, Federal Direct Subsidized and Federal Direct Unsubsidized Loans, Federal Supplemental Loans for Students (Federal SLS Loans).</p> <p>ATI default rate varies from campus to campus. 1. ATI College of Health final default rate in FY 2005 was 3.3%, 2. ATI Career Training Center, Oakland Park and Miami combined FY 2005 final default rate was 10.5%, and 3. ATI Career Training Center, Fort Lauderdale, FY 2005 final default rate was 9.3%</p> <p>These rates were a decrease from the previous year report.</p>

## SCHOOL PROGRAMMATIC REVIEW CHECKLIST

**Institution Name:** Professional Training Center **New School:**   X   **New Program(s)** \_\_\_\_\_

**Date:** 11/9/07 **Updated:** September 23, 2008

	PROGRAMMATIC REVIEW AREAS	(Yes/No/ N/A)	COMMENTS
1.	School's Licensing Information.	YES	Professional Training Center is licensed by the FLDPE/Commission for Independent Education by "Means of Accreditation"
	Accreditation Information, if applicable.	Yes	Accredited by the by the Accrediting Bureau of Health education Schools (ABHES).
2.	School's enrollment information.	YES	PTC's enrollment as of July 1, 2008 was 408 students (day and evening) At the time of the initial review the enrollment was 380 students (both day & evening).
3.	Training Program/Design – Per training program.	Yes	<b><u>Occupational Associates Degree (OAD) Programs</u></b> Diagnostic Medical Sonography General Radiologic Technology
4.	Curriculum per training area requested. Affiliation Agreements, if applicable.	Yes	Full curricula were available and reviewed. Lesson plans developed and instructional objectives and strategies were incorporated. Affiliation Agreements in place for required programs.
5.	Instructional staffing.	Yes	Resumes, CIE Instructional and Administrative Personnel Forms were provided for instructional staff.
6.	Facility.	Yes	Professional training Center (PTC) is located on a six acre campus, currently comprising six buildings with approximately 36,000 square feet of space (offices, classrooms, labs, library and a cafeteria) the school has 16 classrooms, 7 labs (1 Computer Lab, 3 DMS labs, 2 X-Ray Labs and 1 Pharmacy Lab).
7.	Equipment, training aids, books and other instructional material.	Yes	Inventory provided. All equipment maintained and in good working order. Books and materials are on hand.
8.	Placement information. Licensing or Certification rate, if applicable.	Yes	Florida Education & Training Placement Information Program (FETPIP) provided. Performance varies from program. The placement rate for all programs: reported was 85.5%. The School provided its Accrediting Bureau of Health Education Schools (ABHES) Annual reports. The reports are: <ul style="list-style-type: none"> <li>• 2006-2007 Intuitional Annual Report for the period July 1, 2006 – June 30, 2007, and</li> <li>• 2005-2006 Intuitional Annual Report for the period July 1, 2005 – June 30, 2006.</li> </ul> The placement rate for all programs reported was: 74.5% Diagnostic Medical Sonography: 72.45% as of June 30, 2008 General Radiologic Technology: 73.70% as of June 30, 2008.
9.	Staff job development/placement information.	Yes	Resumes provided for the staff responsible for placement assistance.
10.	Additional staffing capabilities, i.e. counseling, case management, etc.	YES	Resumes of other staff provided.



	PROGRAMMATIC REVIEW AREAS	(Yes/No/ N/A)	COMMENTS
11.	Cost data per training program.	Yes	PTC's Total Program cost: <b>OAD Programs</b> 1. Diagnostic Medical Sonography = \$26,370.25 2. General Radiologic Technology = \$28,394.78.
12.	Financial Aid Information.	Yes	PTC is a Title IV eligible school. The School participates in the Federal Pell Grant Program, Federal Supplemental Education Opportunity Grant. In addition PTC participates in the following loan programs: Federal Subsidized and Unsubsidized Stafford Loan Programs, and Federal PLUS Loan Program  PTC's default rate was: 2005 (0.4%, 2004 (7.3%) and 2003 (5.63%)

## SCHOOL PROGRAMMATIC REVIEW CHECKLIST

**Institution Name:** Florida Education Institute (FEI) **New School:**   X   **New Program(s)** \_\_\_\_\_

Date: 08/15/08

Updated: November 19, 2008

	PROGRAMMATIC REVIEW AREAS	(Yes/No/ N/A)	COMMENTS
1.	School's Licensing Information.	YES	Florida Education Institute (FEI) is licensed by the FLDPE/Commission for Independent Education by "Means of Accreditation"
	Accreditation Information, if applicable.	Yes	Accredited by the by the Commission of the Council on Occupational Education (COE).
2.	School's enrollment information.	YES	FEI's enrollment as on 8/15/08 was 228 students (both day & evening). As of October 16, 2008 the total enrollment was 253 students (day and evening)
3.	Training Program/Design – Per training program.	Yes	<u>Proposed Programs:</u> Diploma Programs: Medical Assistant – 730 clock hours – 9 months Medical Coding & Billing – 720 clock hours – 9 months
4.	Curriculum per training area requested. Affiliation Agreements, if applicable.	Yes	Full curricula were available and reviewed. Lesson plans developed and instructional objectives and strategies were incorporated. Affiliation Agreements in place for required programs.
5.	Instructional staffing.	Yes	Resumes, CIE Instructional and Administrative Personnel Forms were provided for instructional staff.
6.	Facility.	Yes	Florida Education Institute (FEI) is located at 5818 SW 8 <sup>th</sup> Street, Miami, FL, in approximately 7,200 square feet of space (offices, classrooms, labs, library) the school has 7 rooms dedicated for training (2 – general classrooms, 2 labs (1 Computer Lab, 1 Massage Therapy Lab) and 3 Combination Class/labs (1-Medical Assistant, 1-Pharmacy, 1 Patient Care).
7.	Equipment, training aids, books and other instructional material.	Yes	Inventory provided. All equipment maintained and in good working order. Books and materials are on hand.
8.	Placement information. Licensing or Certification rate, if applicable.	Yes	<ul style="list-style-type: none"> <li>• FEI's provided. FDOE/CIE Annual Completion, Placement and Licensing performance information on the various programs for the period:</li> <li>• July 1, 2007 – June 30, 2008 – Placement rate for all programs reported was 78.5%</li> <li>• July 1 2006 – June 30, 2007 - Placement rate for all programs reported was 80.77%</li> <li>• July 1, 2005 – June 30, 2006 - Placement rate for all programs reported was 81.08%</li> </ul> Medical Assistant: 77.78% as of June 30, 2008 Medical Billing & Coding: 70.2% as of June 30, 2008.
9.	Staff job development/placement information.	Yes	Resumes provided for the staff responsible for placement assistance.
10.	Additional staffing capabilities, i.e. counseling, case management, etc.	YES	Resumes of other staff provided.

	PROGRAMMATIC REVIEW AREAS	(Yes/No/ N/A)	COMMENTS
11.	Cost data per training program.	Yes	FEI's Total Program cost: <b>Diploma Programs</b> 1. Medical Assistant = \$13,025.00 2. Medical Coding & Billing = \$11,990.00
12.	Financial Aid Information.	Yes	FEI is a Title IV eligible school. The School participates in the Federal Pell Grant Program, Federal Supplemental Education Opportunity Grant. In addition FEI participates in the following loan programs: Federal Subsidized FFEL/Direct Loan, Federal Unsubsidized FFEL/Direct Loan Programs, and Federal PLUS Loan Program  FEI's default rate was: 2006 (0.0%), 2005 (0.0%) and 2004 (0.0%)

**SCHOOL PROGRAMMATIC REVIEW CHECKLIST**

Institution Name: Everest Institute – 3 campuses    New School \_\_\_\_\_    New Program(s) \_\_XX\_\_

Date: 10/29/08    **Update: 12/5/08**

	<b>PROGRAMMATIC REVIEW AREAS</b>	<b>(Yes/No /N/A)</b>	<b>COMMENTS</b>
1.	School's Licensing Information.	YES	Everest Institute three campuses in Miami-Dade County are licensed by the State of Florida/DOE/Commission for Independent Education (CIE).
	Accreditation Information, if applicable.	Yes	Everest Institute three campuses are accredited Institutionally by Accrediting Bureau of Health Education Schools (ABES) and the Accrediting Council of Independent Colleges and Schools (ACICS) In addition; Everest Institute Kendall campus is accredited by the Commission on Accreditation of Allied Health Education – Programmatic Accreditation for Surgical Technology.
2.	School's enrollment information.	YES	Everest's total enrollment as of 12/5/08 was 2533 (both day & evening) for all locations in Miami-Dade County. Enrollment by locations is as follows:  1. Everest Institute, Hialeah Campus – 973 students 2. Everest Institute , North Miami campus - 840 students 3. Everest Institute ,Kendall campus – 715 students
3.	Training Program/Design – Per training program.	Yes	<b>A.S. Degree Program:</b> 1. Business Administration (CIP 0506040102) - 24 months 2.Criminal Justice (CIP 0743010300)- 24 months
4.	Curriculum per training area requested. Affiliation Agreements, if applicable.	Yes	Full curricula were available and reviewed. Lesson plans developed and instructional objectives and strategies were incorporated.
5.	Instructional staffing.	Yes	Resumes, CIE Instructional and Administrative Personnel Forms were provided for instructional staff.
6.	Facility.	Yes	Everest Institute, Hialeah campus located at 530 W. 49 <sup>th</sup> Street, Hialeah, FL occupies approximately 40, 000 sq ft of space and includes 16 Classrooms and 9 labs. Everest Institute, Kendall campus located at 9020 SW 137 <sup>th</sup> Avenue, Miami, FL occupies approximately 26,000 sq ft of space and includes 17 classrooms and 10 labs. Everest Institute, North Miami campus located at 111 NW 183 <sup>rd</sup> Street, 2 <sup>nd</sup> Floor, Miami, FL 9020 SW 137 <sup>th</sup> Avenue, Miami, FL occupies approximately 20, 500 sq ft of space and includes 9 classrooms and 7 labs. This campus is currently in a build out in another building to add approximately 25,000 sq feet of additional space.
7.	Equipment, training aids, books and other instructional material.	Yes	Inventory provided. All equipment maintained and in good working order. Books and materials are on hand.

8.	Placement information. Licensing or Certification rate, if applicable.	Yes	Provided Annual Reports for 2006-2007 and July 1, 2007 – June 30, 2008 required by ABHES. Performance varies from campus to campus and by the programs offered. The placement rate for all programs: reported was 89% with a 72.5% training related placement rate.
9.	Staff job development/placement information.	Yes	Resumes provided for the staff responsible for placement assistance.
10.	Additional staffing capabilities, i.e. counseling, case management, etc.	YES	Resumes of other staff provided.
11.	Cost data per training program.	Yes	Everest's Total Program cost: A.S. Degree Program: 1. Business Administration: \$35,890.00 2. Criminal Justice: \$35,890.00
12.	Financial Aid Information.	Yes	Everest Institute's three campuses are Title IV eligible schools. The School participates in the Federal Pell Grant Program and the Federal Supplemental Educational Opportunity Grant (FSEOG). The schools participate in as well Federal Perkins Loans, Federal Stafford Subsidized Federal Stafford Unsubsidized Loans, Federal Parent Loan for Undergraduate Students (PLUS) and the Florida's Bright Futures Scholarships. Everest's default rate varies from campus to campus. 1. Hialeah and North Miami's final default rate in FY 2005 was 4.5%. In FY 2006 the default rate was 13.0%. 2. Kendall's final default rate in FY 2005 was 4.0%. In FY 2006 the default rate was 136%.

## SCHOOL PROGRAMMATIC REVIEW CHECKLIST

**Institution Name:** South Florida Career Institute (SFCD) **New School:** \_\_\_\_\_ **New Program(s)** XX  
**Date:** 08/26/08 **Updated:** November 24, 2008

	PROGRAMMATIC REVIEW AREAS	(Yes/No/ N/A)	COMMENTS
1.	School's Licensing Information.	YES	South Florida Career Institute (SFCD) is licensed by the FLDPE/Commission for Independent Education by "Means of Accreditation"
	Accreditation Information, if applicable.	Yes	N/A
2.	School's enrollment information.	YES	South Florida Career Institute is a small school with limited enrollment. Class sizes are limited to 12 students. The current enrollment was 4 students.
3.	Training Program/Design – Per training program.	Yes	<u>Proposed Programs:</u> Diploma Programs: Medical Secretary/Dental Front Office – 420 clock hours – 10 weeks Paralegal Assistant – 900 clock hours – 22 weeks NCLEX Examination Review for RN/LPN Professionals of Other Countries – 600 clock hours – 15 weeks
4.	Curriculum per training area requested. Affiliation Agreements, if applicable.	Yes	Full curricula were available and reviewed. Lesson plans developed and instructional objectives and strategies were incorporated.
5.	Instructional staffing.	Yes	Resumes, CIE Instructional and Administrative Personnel Forms were provided for instructional staff.
6.	Facility.	Yes	South Florida Career Institute is a small school and is located at 7615 Davie Road Extension, Hollywood Fl 33024 and is approximately 1,600 square feet of space (2 offices and 2 classrooms, and 1 dedicated computer lab) Note: all classrooms have computer stations for all students. .
7.	Equipment, training aids, books and other instructional material.	Yes	Inventory provided. All equipment maintained and in good working order. Books and materials are on hand.
8.	Placement information. Licensing or Certification rate, if applicable.	Yes	<ul style="list-style-type: none"> <li>• South Florida Career Institute provided. FDOE/CIE Annual Completion, Placement and Licensing performance information on the various programs for the period:</li> <li>• July 1, 2007 – June 30, 2008 - Placement rate for all programs reported was 86.5% ( 31 enrollments, 30 graduates and 26 placements)</li> </ul> In addition, the school also submitted performance information maintained for individuals that are referred by workforce for the periods:: <ul style="list-style-type: none"> <li>• July 1, 2006 – June 30, 2007 – Placement rate for all programs reported was 96.9% ( 33 enrollments, 32 graduates and 31 placements)</li> <li>• July 1 2005 – June 30, 2006 - Placement rate for all programs reported was 95.0%.</li> </ul>
9.	Staff job development/placement information.	Yes	Resumes provided for the staff responsible for placement assistance.
10.	Additional staffing capabilities, i.e. counseling, case management, etc.	YES	Resumes of other staff provided.

	PROGRAMMATIC REVIEW AREAS	(Yes/No/ N/A)	COMMENTS
11.	Cost data per training program.	Yes	South Florida Career Institute Program costs are: <b>Diploma Programs</b> 1. Medical Secretary/Dental Front Office = \$6,125.00 2. Paralegal Assistant = \$10,375.00 3. NCLEX Examination Review for RN/LPN Professionals of Other Countries = \$8,325.00
12.	Financial Aid Information.	Yes	South Florida Career Institute is not participating in any financial aid program (Title IV, or loan programs) at this time.



5.

**SFWIB - Economic Development & Industry Sector (EDIS) Committee**

*December 11, 2008*

**Employed Worker Training Program (EWTP)**

**Informational Item**

SFW's Employed Worker Training (EWTP) program created in January 2007 is designed to offer outreach to the Region's employer community by providing training services to enhance the skills of the employer's workforce in an effort to assist the employer in becoming more competitive in the global marketplace.

For PY 2007-2008, SFWIB allocated \$800,000 for the EWTP training pool. Approximately, 393 workers were provided training services through EWT program. Due to the anticipated funding rescission alert, EWTP funds were placed on hold and only \$134,251 were awarded for PY 07-08.

The 2008-2009 SFWIB budget, includes an allocation of \$500,000 for the EWT program

*Attachment*



**Summary of EWTP Projects**

Company Name	Funds Awarded - Appropriated from SFW Pool (\$800,000.00)	Training Area(s) Provided	# of Employees to be trained	Average Wage	Service Partner Requesting Funds	Cost Per Trainee	Remaining Balance from the SFW EWTP Pool - (\$800,000.00)	Approved	Total Number Trained	Funds Paid	Comment
<b>ACE American Insurance Company dba ACE International</b> -- Regional office for Latin America - The company is involved in financial services, provides insurance for private and corporate clients in Latin America	\$ 20,850.00	MS Bootcamp - EXCEL and PowerPoint	15	\$ 28.13	SER-Jobs for Progress	\$ 1,390.00	\$ 779,150.00	Aug-07	15	\$ 20,850.00	Training Completed
		MS 2003 Server Admin., CISSPBC Exchange 20									
		MS SQL 2005 Admin., MS C# Programming									
<b>Atlantic Dental, Inc.</b> - The company is a provider of dental insurance services and claims processing.	\$ 29,456.25	Excel, PowerPoint, Word, Access, QuickBooks, Great Plain	37	\$ 19.35	SER-Jobs for Progress	\$ 1,061.49	\$ 749,693.75	Oct-07	33	\$ 29,075.00	
<b>Tradewinds Power Corporation.</b> - The company is a Original Equipment Manufacture (OEM) of pump sets, generators and control panels.	\$ 38,443.75	Lean (1) 3 Workshops (2) 1	60	\$ 20.71	Youth Co-Op	\$ 833.23	\$ 711,250.00	Oct-07	58	\$ 33,200.00	
		Lean Dev. VSM (3)									
		3 Rapid Improvement Events (RIE)									
<b>Bella Automotive Group, LTD dba Headquarters Toyota</b> - The company is an automotive car dealer that services new and used vehicles.	\$ 19,975.00	Automotive training: Electrical and Electronics Technology	25	\$ 14.46	Arbor E&T	\$ 799.00	\$ 691,275.00	Oct-07	19	\$ 15,181.00	
<b>Palms Springs General Hospital, Inc.</b> - Provides healthcare services.	\$ 22,850.00	Nurse Legal documentation	207	\$ 20.30	City of Hialeah	\$ 110.39	\$ 668,425.00	Nov-07	195	\$ 21,800.82	
		OSHA compliance Customer Service and leadership									
<b>Tim-Bar Corporation dba Tim-Bar Packaging and Display</b> - a manufacturing company that converts rolls of paper into corrugated (carboard) sheets.	\$ 94,500.00	Lean Fundamentals	158	\$ 17.70	Youth Co-Op	\$ 598.10	\$ 573,925.00	Dec-07	61	\$ 4,557.00	
		Kaizen Training									
		Value Stream Mapping									
<b>Esserman Nissan Inc.,</b> - The company is an automotive car dealer that services new and used vehicles.	\$ 15,181.00	Automotive training: Electrical and Electronics Technology	19	\$ 15.26	Arbor E&T	\$ 799.00	\$ 549,144.00	Mar-08	12	\$ 9,588.00	

Funds Awarded - Appropriated from SFW Pool (\$800,000.00)*	# of Employees to be trained	Average Wage	Cost Per Trainee
\$ 134,251.00	393	\$ 19.41	\$ 341.61

\*Baptist Health South Florida, Inc. information not included.



6.

**SFWIB - Economic Development & Industry Sector (EDIS) Committee**

*December 11, 2008*

**Informational - National Emergency Grant (NEG)**

## INFORMATIONAL ITEM

National Emergency Grants (NEG) are discretionary awards by the Secretary of Labor that temporarily expand service capacity at the State and local levels through time-limited funding assistance in response to significant dislocation events. Significant events are those that create a sudden need for assistance that cannot reasonably be expected to be accommodated within the ongoing operations of the formula-funded Dislocated Worker program, including the discretionary resources reserved at the State level.

The DOL Employment & Training Administration (ETA) supports innovative strategies that assist dislocated workers, and the communities in which they live and work, recover economically from the effects of plant closures and mass layoffs. A primary strategy is building a demand-driven workforce system that integrates workforce investment activities with economic development initiatives.

National Emergency Grant applications cover the following dislocation events:

1. *Regular - A single company layoff* of 50 or more workers. Priority in funding will be given to applications that document the participation of a large enough group of workers to sustain a separately funded project. Generally, participation of **fewer than 50 workers** would be expected to be served with formula Dislocated Worker program funds, but ETA will examine the sustainability of projects serving smaller groups on a case-by-case basis.
2. *Multiple company layoffs*, where the dislocations from each company **impact 50 or more workers**. Priority will be given to applications that demonstrate a sustainable project size. Generally, the documented planned participation of at least 50 workers from each qualified company will be considered to meet this standard.
3. *Industry-wide layoffs* from companies in the same industry as determined by the three-digit code level in the North American Industrial Classification System. Priority will be given to applications that document the planned participation of 50 or more workers from each company of 50 or more workers (mass layoff/plant closure minimum for a NEG application) when the affected workers are not in the same local workforce investment area. Where the dislocation events are in the same local workforce investment area, one company must have a layoff of more than 50 workers, and other identified companies may have layoffs of fewer than 50 workers as part of the same application.
4. *Community impact* projects to assist workers in a local workforce investment area (primarily rural) where multiple small dislocations over a 6-month period have a significant impact on the unemployment rate of the local workforce area, as determined by the State. For single-area States, a local commuting area or labor market area should be used. Priority will be given to applications where an increase in the unemployment rate of 1 percent has occurred in the affected local workforce area (or local commuter area or labor market area in single area states) over the previous six months. Each company and location must be identified as with other multiple company applications.

On Monday, November 24, 2008 SFW in partnership with the Beacon Council, Monroe County, Miami-Dade County, Key West Chamber of Commerce, Miami-Dade College and the Academy met to discuss the preparation for an NEG.

The purpose of this meeting is to determine the industries to focus on, as well as the number of Miami-Dade/Monroe County citizens that are laid off in order to draft a proposal to request additional dollars under the National Emergency Grant to assist lay off workers with training and/or employment. A NEG outline was developed to gather material to draft NEG.