Institute for Apprenticeship, Training and Education Programs

January 14-16, 2019
Hyatt Regency Miami | Miami, Florida
Preconference: January 13, 2019

Register by December 3 to Save US$300!

www.ifebp.org/apprenticeshipinstitute
Most sessions were designed to address the common elements of apprenticeship programs in Canada and the United States. Where noted, sessions will address the differing legal and regulatory environment in each country.

General sessions  U.S.–specific sessions  Canadian-specific sessions
Institute for Apprenticeship, Training and Education Programs
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Apprenticeship programs are growing in popularity, due in part to a looming skills shortage and the increasing cost of postsecondary education. The Institute for Apprenticeship, Training and Education Programs provides education on effective trust fund management and best practices in Canadian and U.S. apprenticeship programs. This premier conference will help you effectively manage your apprenticeship program as you discuss key topics from recruitment and retention to adult learning and fiduciary responsibility.

Who Should Attend
The institute is designed specifically for the needs and interests of stakeholders involved in training and education funds in both Canada and the United States: trustees, JATC and training trust fund members, union/employer association representatives, administrative staff, training directors, coordinators, instructors, intermediaries, workforce development professionals and others who provide services to training and education funds.

Key Takeaways
• Learn best practices in the management of your fund and in running your training program.
• Understand legal and regulatory requirements.
• Identify ideas and opportunities by networking with peers who face similar challenges.
• Receive valuable written resource materials.

Hear about two new educational opportunities when you attend this institute:
• Online Apprenticeship Program Answer Guide
• Tour of the German Apprenticeship System.
Preconference Workshop
Sunday, January 13, 2019
8:00 a.m.-1:00 p.m.
Hyatt Regency Miami | Miami, Florida

Workplace Harassment—Foundations, Prevention and Investigation

The issue of harassment has garnered much attention in the media of late. Harassment creates a very hostile and unproductive environment, and it can happen anywhere. In these politically contentious and litigious times we live in, you can expect harassment to remain in the headlines for some time. This workshop is designed to help you understand what constitutes harassment and the best practices to create an environment where everyone is free from harassment. The session will cover process, legal issues and people strategies, including:

- Laws that impact plan sponsors, employers and fellow employees
- Policies, procedures and internal controls you should have
- Communication
- Prevention and training
- Warning signs
- What to do when a harassment claim is made
- Investigations
- Roles and responsibilities
- The need for cultural competency.

Workshop Leaders

Paul O. Catenacci, Esq.
Partner
Novara Tesija & Catenacci, PLLC
Southfield, Michigan

Moira J. Kelly
President
Kelly Consulting LLC
New Berlin, Wisconsin

Mark T. Firman
Director and Legal Counsel
Ontario Teachers’ Pension Plan Board
Toronto, Ontario

Separate registration fee is required.
Program Schedule
All sessions are open to all attendees; however, certain sessions will contain country-specific content, as noted.

SUNDAY, JANUARY 13, 2019

7:30-8:00 a.m.
Preconference Registration and Continental Breakfast

8:00 a.m.-1:00 p.m.
Preconference Workshop: Workplace Harassment—Foundations, Prevention and Investigation

4:00-6:00 p.m.
Conference Registration/Information

MONDAY, JANUARY 14, 2019

7:00-7:30 a.m.
Registration/Information and Continental Breakfast

7:30-8:45 a.m.
Opening Session—Artificial Intelligence, the Future of Work and Implications for Apprenticeship Programs

Speaker
Shawn DuBravac, Ph.D., CFA, Futurist and Best-Selling Author, Former Chief Economist and Senior Director of Research, Consumer Technology Association, Lorton, Virginia

9:00-10:15 a.m. Concurrent Sessions
Fiduciary Responsibility in U.S. Apprenticeship Programs

ERISA-covered apprenticeship programs are required to adhere to certain standards of conduct relating to the oversight of fund assets. This session will provide an overview of:

- Legal framework, governing laws and documents
- The two-hat rule and prohibited transactions
- Who a fiduciary is and what fiduciary responsibilities and obligations are
- Best practices.

Fiduciary Responsibility in Canadian Apprenticeship Programs

This session will focus on fiduciary responsibilities in running a training trust fund in Canada, including:

- Review of fiduciary responsibility
- Who is a fiduciary?
- Best practices.
Program Schedule

MONDAY, JANUARY 14, 2019 (CONT.)

10:30-11:45 a.m. Concurrent Sessions

**U.S. Legal and Legislative Update**

This session will provide an overview of the current legal, legislative and regulatory issues impacting apprenticeship programs. Topics may include:

- Marijuana in the workplace
- Partners Act
- CFR 2930.

**Hot Topics in Canadian Apprenticeship Programs**

This session will focus on current hot topics that Canadian apprenticeship programs are dealing with. Topics may include:

- Harmonization and Red Seal Trades
- Relocation support—transitioning apprentices to new jurisdictions
- Impact of cannabis legalization
- Engaging indigenous apprentices.

11:45 a.m.-1:15 p.m.

**Luncheon**

1:15-2:30 p.m.

**Spotlight on the Role of JATC Members/Trustees**

While every organization is slightly different, the duties and responsibilities of those who serve as JATC members and/or trustees are very important. This session will discuss:

- Different models of governance relative to JATC members and trustees
- Understanding the role of a JATC member and/or trustee relative to apprentices and industries
- How JATC members and/or trustees can best support directors, coordinators and instructors.

2:45-4:15 p.m.

**Spotlight on the Role of Directors/Coordinators**

Directors and coordinators are essential to the successful day-to-day operations of your organization. This session will focus on:

- What JATC members and trustees expect of directors/ coordinators
- Continuing education for directors/ coordinators
- When to call in the professionals
- In the office vs. in the field
- Dealing with discipline
- Unique challenges that directors and coordinators deal with.

4:15-5:15 p.m.

**Welcome Reception**
Program Schedule

TUESDAY, JANUARY 15, 2019

7:00-7:30 a.m.
Registration/Information and Continental Breakfast

7:30-9:00 a.m.  Concurrent Sessions

Rethinking Recruitment and Retention
Economic conditions and employment opportunities have a direct impact on how you approach recruitment and retention. Your tactics may need to change quickly. This session will take a strategic look at recruitment and retention activities, including:

• The numbers game—How many do you need?
• Long-term workforce planning
• Who are you recruiting, and where are they coming from?
• Partnering with government, industry, academia, community organizations and intermediaries
• Career and technical education in high schools and community colleges
• Legal issues
• Developing a strategic plan
• Contingency planning for changing market conditions
• Rebranding the trades.

Risk Management for Apprenticeship Programs
This session will consider many of the exposures to risk for apprenticeship programs, with a focus on:

• Operational risks
• Reputational risks
• Cybersecurity risks
• Developing a process to identify and mitigate potential threats
• Insurance coverage options.

9:15-10:30 a.m.  Concurrent Sessions

Supporting a More Diverse Workforce
This session will focus on the unique needs of working with two targeted segments of your population—women and minorities. Working with these segments may require different strategies and tactics. This session will look at:

• Barriers that women and minorities face when working in the trades
• Best practices for recruiting and retaining
• EEOC and legal issues (U.S.)
• Employment Equity Act (Canada)
• Success stories.

Working With Veterans and Ex-Offenders
This session will focus on the unique needs of working with those who are preparing for or living life after military service or incarceration. This session will consider:

• Barriers to employment
• Best practices for recruiting and retaining
• Needs in the classroom and on the jobsite
• Success stories.
Program Schedule

TUESDAY, JANUARY 15, 2019 (CONT.)

10:45 a.m.-12:00 noon  
Concurrent Sessions

Promoting the Trades
This session will focus on communicating the value of work in the trades and apprenticeship programs, including:

- Messaging regarding your industry, work in the trades and employment opportunities
- Developing your plan and tactics and measuring success.
- Different channels such as social media, web-based and face-to-face communications

The Importance of Building Essential Skills
Ensuring apprentices have essential skills is key to their success. This session will look at initiatives training and apprenticeship funds have implemented to ensure their apprentices have the necessary communication, reading, math and technology skills to become journeyworkers and masters.

12:00 noon-1:30 p.m.

Luncheon

1:30-2:45 p.m.  
Concurrent Sessions

Running Your Training Fund as a Business
This session will focus on best practices for financial and operations management for apprenticeship programs. Key areas of discussion will surround:

- Strategic planning
- Audits
- Metrics
- Internal controls
- Financials
- Fraud and cybersecurity.

Overview of the German Apprenticeship System
For centuries, the German model has relied on industry-based relationships that include the secondary educational level in order to produce most of their journeyworkers. This is in stark contrast to the postsecondary leanings of the over-70-year-old U.S. model. This session will examine the many aspects of the German system that experts often cite as the world's best example of an effective and efficient apprenticeship system. The session will also provide an overview of the International Foundation Tour of the German Apprenticeship System, which will be offered in June of 2019.

“The education received from this conference is worth every penny spent.”

Adam Holmes  
Director of Training  
IUPAT District Council 7  
Big Bend, Wisconsin
Program Schedule

TUESDAY, JANUARY 15, 2019 (CONT.)

3:00-4:15 p.m.  Concurrent Sessions

HR Issues in Apprenticeship Programs 🇺🇸
For those who manage apprenticeship programs, there are many facets of human resource management when dealing with instructors, staff and students. This session will cover:

- Policies and procedures you should have
- Managing people
- Understanding labour and employment law.

Jobsite Training and Field Mentoring 🇺🇸 🇨🇦
This session will feature a discussion of training that happens in the field. Topics include:

- Addressing the culture of the worksite
- Jobsite training programs
- Job quality
- Training journeymen and -women
- Mentoring programs
- Soft skills and upskills.

WEDNESDAY, JANUARY 16, 2019

7:00-7:30 a.m.
Registration/Information and Continental Breakfast

7:30-8:45 a.m.
Addressing Mental Health and Substance Abuse in Apprenticeship Programs 🇺🇸 🇨🇦
Mental health and substance abuse have reached epidemic proportions in recent years. Whether it is rooted in anxiety, depression, PTSD, PCS, CTE or some other source, its impact is significant. This session will feature a discussion of the unique challenges that apprenticeship programs have in dealing with those who are battling addiction or illness. Topics include:

- Issues in school and on the worksite
- Policies
- Finding services
- Legal issues
- Mental health first aid
- What you can and should do—situational best practices.

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Program Schedule

WEDNESDAY, JANUARY 16, 2019 (CONT.)

9:00-10:15 a.m.  
Concurrent Sessions

Workforce Development Solutions

Workforce development activities develop the workers with the right skills for the right jobs at the right time. Taking a broad view of training and bringing together all stakeholders produces results. This session will focus on:

- Local workforce development boards
- WIOA implementation
- External grant funding
- Intermediaries—bringing together industry, labour, government and other stakeholders
- Success stories.

Supporting Apprentices With Learning Disabilities

This session will focus on the unique needs of those with learning disabilities and how to best support them throughout their apprenticeship, including:

- Recognizing disabilities
- Best practices for accommodations
- Curriculum design
- Testing accommodations
- Jobsite support
- Legal issues
  - Americans with Disabilities Act
  - Canadian Charter of Rights and Freedoms
  - The Canadian Human Rights Act.

10:30-11:45 a.m.  
Concurrent Sessions

U.S. Open Forum

This is an open discussion of issues that are relevant to training trust funds. This session will provide a forum to address the most pressing issues that trustees, JATC members, administrators, directors/coordinators and instructors struggle with on a daily basis. Questions and topics may be related to any of the conference sessions or emerging issues.

Canadian Open Forum

This is an open discussion of issues that are relevant to training trust funds. This session will provide a forum to address the most pressing issues that trustees, JATC members, administrators, directors/coordinators and instructors struggle with on a daily basis. Questions and topics may be related to any of the conference sessions or emerging issues.

Session topics and speakers are subject to change. For the most current list of speakers and sessions, visit www.ifebp.org/apprenticeshipinstitute.
Hotel Information

Hyatt Regency Miami

Hyatt Regency Miami sits next to the heart of Brickell, one of the trendiest neighborhoods in Miami. With its iconic white towers overlooking the Miami River, the hotel puts you steps from the Miami Riverwalk and less than two miles from the Port of Miami. Walk to the Metromover station next door and ride to destinations like Coral Gables or the Wynwood Arts District. Shop the Brickell City Centre, less than a mile away, visit Little Havana for authentic Latin flavors, or explore the Phillip and Patricia Frost Museum of Science.

Rate: US$244 single/double occupancy

Reservation Deadline: December 10, 2018

You will be charged a US$350 deposit upon registration. Please specify your hotel requirements on the registration form.

Sponsorship Opportunities

Sponsorships are now available to Canadian and U.S. service providers that serve apprenticeship programs. Do you have service providers you would like to share with your peers? Encourage them to sponsor and grow their business with this focused audience of trustees, administrators, training directors, instructors and plan professionals who work with and manage apprenticeship funds.

Three levels of food and beverage event sponsorships available:

- **Gold Sponsorships** US$5,000
  - Sponsorship of attendee luncheon

- **Silver Sponsorships** US$2,500
  - Sponsorship of continental breakfast

- **Bronze Sponsorships** US$1,500
  - Sponsorship of refreshment break

Sponsorships include company name and logo on conference signage and table tent cards at the sponsored event, inclusion in the Sponsor Directory, complimentary or discounted conference registrations, and much more!

Contact me today for more information!
Diane Mahler
(262) 373-7656 | dianem@ifebp.org
Looking for a central location to find key resources for your training and education fund? Our Apprenticeship Resources web page compiles these items for both Canadian and U.S. stakeholders, including:

- **News Feed of Training and Education Stories**—Find the most current news stories on apprenticeship training, including legislative updates, research studies, blog posts and other helpful resources.

- **Articles, Papers and Survey Data**—Published in *Plans & Trusts* (Canada), *Benefits Magazine* (U.S.) and other sources, useful apprenticeship articles are organized by date and country of origin.

- **Case Studies**—Learn from other members through apprenticeship-focused case studies regarding recruitment, retention and key partnerships. You can also submit your case study for publication consideration!

- **Links to External Organizational Websites**—We’ve selected sites that are most useful for training and apprenticeship funds in Canada and the United States.

- **Suggestions**—Share your success stories, ideas for session topics or resources we should add to our website.

- **Learn About Upcoming Educational Opportunities**—The International Foundation offers a number of educational programs with apprenticeship topics. Plan ahead for your education.

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**On-Site Education**

**Take Your Training to New Heights With On-Site Education**

Bring the industry-leading International Foundation education directly to your workplace with on-site education. Without the cost or inconvenience of travel, your staff can receive high-quality education in a customized, one-of-a-kind learning experience. Choose from face-to-face training or online learning—whatever works best for your organization.

**Programs of interest to apprenticeship funds include:**

- Deliberate and Impactful Training
- Running Your Training Fund as a Business
- Diversity Training
- Harassment Training.

**For more information, visit:**

www.ifebp.org/onsite-education or call (262) 373-7648.

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**Four Reasons to Choose On-Site Education for Your Organization**

1. **Cost-Effective**
2. **Convenient**
3. **Team Building**
4. **Customized**

Apprentices have a lot to learn. Not only are they acquiring new job skills, but it may be the first time they’ve been offered benefits or earned a substantial paycheck.

This new, easy-to-navigate online course will help apprentices build a solid financial foundation. It highlights the issues they should consider as they are getting started in their jobs and provides helpful tips for the future.

The course builds on the proven curriculum developed by Port Jobs and offers an engaging format complete with self-check quizzes and practical worksheets.

Students will learn how to:

- Estimate earnings
- Start an emergency fund
- Save for retirement
- Plug spending leaks
- Create a spending plan
- Fund big purchases
- Compare credit card offers
- Understand credit scores
- Protect against identity theft
- Determine how much debt is too much
- Create a debt repayment plan

Lesson 1
Be Prepared for Your Apprenticeship
Learn how to prepare for a career in the trades. This lesson demonstrates how to set financial goals, estimate yearly earnings, prepare for financial fluctuations and start saving for retirement.

Lesson 2
The Power of Spending Plans
Setting up a spending plan is one of the best ways to reach personal finance goals. Discover ways to track spending and take steps to increase income or cut expenses.

Lesson 3
Make Credit Work for You
Having a good credit history is an important step toward financial success. Learn how to compare credit card offers, get a free credit report, understand credit scores and avoid identity theft.

Lesson 4
Take Control of Your Debt
Debt is a part of life, but how much is too much? This lesson introduces the concept of debt, shows how to create a debt repayment plan and identifies bankruptcy options if they are ever needed.

See page 14 for additional information, or learn more at www.ifebp.org/toolsfortrades.
CONTINUING EDUCATION CREDIT

Programs sponsored by the International Foundation of Employee Benefit Plans are consistently accepted for credit by agencies governing continuing education for license renewal and professional recertification. Please note that preapproval by the governing agency is sometimes necessary. It is important, therefore, to register at least 45 days prior to the program taking place.

Note: Requests made for continuing education credit do not guarantee administration of credit.

For further information on continuing education credit, please call (262) 786-6710, option 2.

POLICIES

New cancellation policies effective for 2019 education programs. Cancel and transfer fees are based on registration fee paid: 60+ days of meeting is 10%; 31-59 days of meeting is 25%; within 30 days of meeting is 50%. Hotel deposit is forfeited for cancellations/transfers received within 3 days (5 days for Disney properties) of arrival. Registration fee is forfeited once program commences. For details and the 2019 policy, see www.ifebp.org/policies.

EDUCATIONAL SESSIONS

Educational sessions at this program can qualify for CEBS Compliance credit. Visit www.cebs.org/compliance for additional information.

RELATED READING

Financial Tools for the Trades: Trainer Toolkit
Port Jobs
Everything an instructor needs to teach Financial Tools for the Trades to apprentices, including an instructor’s script, learning activities, ready-made PowerPoint presentations and more!

US$143 (Nonmembers US$149.25)
www.ifebp.org/books.asp?9101
Prices include shipping/handling.

Port Jobs
This user-friendly book mirrors the content available in the e-learning course and can accompany the Trainer Toolkit or meet the needs of apprentices who would prefer a paper learning guide.

US$12.95 (Nonmembers US$13.60)
www.ifebp.org/books.asp?9103
Quantity discounts start at 20 copies.

REGISTRATION INCLUDES
Continental breakfasts • Lunches • Beverage breaks • Networking reception

JOIN US ONLINE

#IFEBP
REGISTRATION/2019
Institute for Apprenticeship, Training and Education Programs (32-1932)

Attendee Information (Please print clearly)

Individual ID# or CEBS® ID#

Full first name M.I. Last name

Title

Address Business Home

City State/Province Country ZIP/Postal code

Phone Business Home Mobile

E-mail

Form completed by Phone

Not a Member? Join Now and Save!

Join to receive member rates and more at www.ifebp.org/join.

Registration Information

Bill to organization name

Bill to organization ID #

Badge name Badge title

Special assistance—specify

Special dietary requirements—specify

Institute for Apprenticeship, Training and Education Programs (32-1932)

January 14-16, 2019 | Miami, Florida

Conference member fee $1,515

Conference nonmember fee $1,845

Sunday preconference member fee $455

Sunday preconference nonmember fee $565

Hotel

Reservation deadline: December 10, 2018 • Include US$350 hotel deposit

Hyatt Regency Miami—Miami, Florida (US$244 single/double)

# of Adults # of Children King bed Two beds

Arrival date Departure date

Special requests—describe

Continuing Education Credit

The International Foundation will apply for CE credit based on requests indicated below.

☐ Actuary ☐ Attorney ☐ CFP ☐ CIMA ☐ CPA ☐ HRCI ☐ Insurance producer*

☐ SHRM ☐ Other, specify

Licensed in the state(s) of License/NPN/BAR/CPA #

*Preapproval of programs/seminars is required in ALL insurance states. This process can take up to 90 days. Late requests could preclude insurance producers from earning credit. NOTE: Requests made for CE credit on this form do not guarantee administration of credit.

Payment Must Accompany Order

New! Policies have changed. See www.ifebp.org/policies.

Make check payable to International Foundation.

☐ Check # US$ 

Credit card # Exp. date

Cardholder’s name (print)

www.ifebp.org Secure fax International Foundation P.O. Box 689954, Chicago, IL 60695-9954

Questions, e-mail edreg@ifebp.org, or phone (888) 334-3327, option 2.
Session Topics Include:

- Artificial intelligence
- Fiduciary responsibility
- Recruitment and retention
- Risk management
- Running your training fund as a business
- Mental health and substance abuse

Register by December 3 to save US$300 with the early registration discount!

Visit www.ifebp.org/apprenticeshipinstitute to register, or call (844) 809-2698, for more information.

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