



Incentive Funding for APICS Training

**What you need to know to save on your
corporate training costs**

Donna L. Harak



Advancing Productivity, Innovation, and Competitive Success





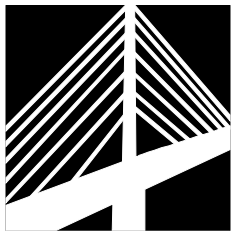
Who we are.....

Harak Associates is a consulting firm that manages the application and reimbursement process for state and local incentive programs available to local businesses, including but not limited to:

Training grant programs

Workforce programs

Tax refund programs



Donna Harak (813) 240-7047

HARAK ASSOCIATES

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APICS Educational Resources

- Florida West Coast Chapter (<http://www.apics-flwc.org/education.html>)
 - Certified in Production and Inventory Management (CPIM)
 - Customer-Focused Supply Chain Management Course
 - Certified Supply Chain Professional (CSCP)
 - Global Sourcing Workshop Series
 - Lean Enterprise Workshop Series
- Course content, schedule, and pricing information:
Jerry Kilty, CFPIM, CIRM, CSCP
EducationVP@apics-flwc.org
(727) 725-7674



Training Grants that reimburse Businesses using APICS Training

- ▶ State of Florida programs for Businesses
 - **Incumbent Worker Training (IWT) grant**
 - (Existing employees)
 - **Quick Response Training (QRT) grant**
 - (New hires)
- ▶ Regional Workforce Board programs
 - **Employed Worker Training (EWT) grant**
 - (Existing employees)
 - **On-The-Job (OJT) grant**
 - (New hires – salaries, not actual training)



State of Florida Training Grant Programs

- Incumbent Worker Training (IWT) grant

If your company:

- Has been in business at least one year
- Has at least one Full Time Employee working 37.5 hours/wk or more
- Is NOT a Retail establishment
- Is NOT a Not-for-Profit company
- Is NOT a government entity
- Has NOT been awarded an IWT grant award in the last program year

THEN.....



Incumbent Worker Training Grant

- You may create an employee training plan that includes but is not limited to:
 - Occupational Skills Training
 - Educational Training including: CEUs, workplace literacy, soft skills
 - Training in sales, management, strategies to improve business operations, etc.
 - Generic computer software training (i.e. Word, Excel, Access, etc.)
 - Computer software training specific to the business (custom and/or proprietary) software
 - Webinars, seminars, conferences, etc.



Incumbent Worker Training Grant

- This means ALL TRAINING offered under the APICS umbrella is eligible for a reimbursement grant
 - A company may only apply once in a state fiscal year, and can only apply every other year, so maximizing the training forecast is essential. Once pre-approved for all training, including APICS courses, the company has up to 12 months to use the grant award.
 - The state offers 50% reimbursement of the training budget up to \$50,000 per county AND business unit with a maximum of \$4,500 for any one individual trainee



Add'l State of Florida Training Programs

The Quick Response Training (QRT) grant for NEW hires may be a good fit for your company if you:

- Plan to add 10 percent to your Full Time Employee (FTE) base AND
- Will pay an average annual wage for those permanent, NEW positions of approximately \$46,800 AND
- Agree to post the NEW job requirements with your local Regional Workforce Board



Quick Response Training (QRT) Grant

- You may create a training plan for the NEW hires for:
 - Customized skills training
 - Maximum \$1,250/job created
 - 2 year grant timeframe
 - May reapply for a new grant after all training is completed
- Reimbursable expenses include tuition, curriculum development and textbooks. Again, this requires pre-approval before training may begin.



Quick Response Training (QRT) Grant

- This means **ALL TRAINING** offered under the APICS umbrella is eligible for use to train **NEW Hires**
 - You may forecast training to occur over a maximum of 24 months and, with pre-approval, the state will reimburse your training costs up to \$1,250 for each new position created (NOT a 50% reimbursement program)
 - The **MAXIMUM** dollar cap for this grant is based on the number of new jobs you create (10 new jobs = \$12,500; 100 = \$125,000)



Regional Workforce Board Grants

- ▶ Local Workforce Board Programs
 - **Employed Worker Training**
 - Company in business at least one year and only gov't entities are excluded (not-for-profit and retail are eligible)
 - Employee wage falls between \$12/hr and \$25/hr
 - As long as the employee is on payroll at the time of training they are eligible
 - Trainee job description is on the region's Targeted Occupations List
 - Training results in training certificates



Employed Worker Training

- This grant requires pre-approval of the training outline
- This program reimburses 100% of the cost of training
- Employers must provide resources equivalent to 50% of the training reimbursement amount
 - Trainee wages
 - Travel expenses
 - Curriculum development
 - Paying some portion of the tuition, instructor's wages, textbooks, or materials & supplies associated with the training counts towards meeting this requirement



Additional Requirements

- State IWT & QRT training grants are funded by state tax dollars and require an employer to provide financials about the company at time of application. Social security numbers for trainees, as well as hire dates & average hourly wage rates are required to claim reimbursements.
- Regional Workforce Board training grants are funded from federal dollars. They require all trainees to complete and sign a census track-type personal data form before a reimbursement check will be issued.
- Proof of citizenship for all trainees may be requested during any state audit of a grant program for up to five years after training is completed.



Additional Regional Workforce Board Grant

- On-the-Job Training – a Wage reimbursement, not a training cost reimbursement
 - Company must post the jobs with their regional workforce board
 - New position must pay at minimum \$8/hr
 - Company agrees to provide training for a full time position (salaried or hourly) AND retain the employee for a minimum of six months
 - Regional workforce board will reimburse 50% of candidate's wages for a specified timeframe (negotiable, but usually 10-12 weeks) while in training



Unemployed or Dislocated Worker

If you are:

- 18 years of age or older
- Meet US Citizenship requirements or hold a current Authorization to Work in the U.S.
- Have been laid off or received notice of a pending layoff and are unlikely to return
- Have exhausted your Unemployment Compensation benefits
- A displaced homemaker, contractor or self-employed individual unemployed due to current economic conditions
- An unemployed, honorably discharged military veteran or military spouse

THEN....

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Individual Training Accounts

- Individual Training Accounts (ITAs) are available through your local regional workforce boards
- Job Seekers choose among state authorized/eligible providers usually colleges and universities, but multiple choices are available
- Job Seekers then choose the training program that best meets their needs, and is a career path identified on the region's designated targeted occupations list
- Maximum lifetime benefit of \$5,100 per eligible participant

NOTE: We have verified that APICS courses are eligible for reimbursement!

Contact Jerry Kilty for course information...



Bottom Line

- If your business meets the qualifying criteria for a program you could expect:
 - IWT existing employee training – 50% reimbursement of training costs up to a maximum of \$50,000 per county and business unit
 - QRT new hire training grant – up to \$1,250/new hire
 - Employed Worker Training for existing employees – 100% reimbursement up to a maximum of \$50,000
 - OJT new hire training – 50% wage reimbursement for a negotiated timeframe for new hires you agree to train
- If you are unemployed, you may be eligible for up to \$5,100 to offset your personal training costs for APICS courses!



Useful URLs

- <http://www.workforceflorida.com/PrioritiesInitiatives/FundingOpportunities/IWT.php>
- <http://www.workforceflorida.com/PrioritiesInitiatives/FundingOpportunities/QRT.php>
- <http://www.floridajobs.org>
- http://www.floridajobs.org/workforce/WIA_QA_Answers.html
- <https://www.worknetpinellas.org>
- <http://www.workforcetampa.com>



Questions?

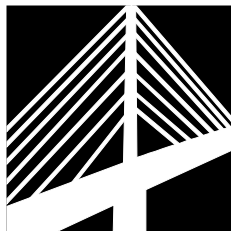
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