



Institute *for*  
**Apprenticeship**

Training and Education Programs

**January 13-15, 2025**

Disney's Yacht & Beach Club Resorts | Orlando, Florida

**Preconference Session: January 12, 2025**

**Virtual Option Available!**



# Institute *for* Apprenticeship

## Training and Education Programs

**January 13-15, 2025**

Disney's Yacht & Beach Club Resorts  
Orlando, Florida

**Optional Preconference Session: January 12, 2025**

The Institute for Apprenticeship, Training and Education Programs is the premier conference for those who manage apprenticeship programs in the U.S. and Canada. Learn current trends and best practices in managing trust funds and apprenticeship programs. Discuss the current and relevant issues that are impacting your program, providing the clarity you need to plan for the future. Join your peers in Orlando to learn from experts and share ideas, opportunities and lessons learned.

### **Who Should Attend**

This conference is designed for all stakeholders of apprenticeship, training and education funds in both the U.S. and Canada, including:

- Trustees, both labor and management
- Training directors, coordinators and instructors
- JATC training trust fund members
- Union and employer association representatives
- Administrators and staff
- Intermediary and workforce development professionals
- Service providers to apprenticeship and training programs.

**Register online at**  
[www.ifebp.org/apprenticeshipinstitute](http://www.ifebp.org/apprenticeshipinstitute)

## Key Takeaways

This conference is loaded with opportunities to engage and learn so you can:

- Understand the legal requirements and issues that must be addressed operationally and at the fund level
- Learn best practices in program management to improve efficiency and grow engagement
- Benchmark your key metrics, curriculum and instruction
- Identify new ideas and opportunities as you network with peers who face similar challenges
- Receive valuable resource materials
- Network with peers and industry leaders who have faced the issues you have and learn what worked for them
- Get inspired to improve employee engagement and produce positive outcomes for plan members
- Explore turnkey solutions that can be applied right away for health and wellness in the workplace and beyond.

## Can't Join Us in Orlando?




Join us virtually!

When you select the virtual option, you have the flexibility of participating in the live sessions as they are scheduled or watching them on demand in the 30 days following the conference. Virtual attendees are also eligible to receive a Certificate of Attendance, provided they meet the same participation requirements as those attending in person. Continuing education credit for professional licenses/designations/certifications is only available for those who attend in person.

# PROGRAM AT A GLANCE

SUNDAY   January 12, 2025			
8:00 a.m.-1:00 p.m.	<b>Preconference:</b> Understanding and Engaging With Your Apprentices, Journeyworkers and Today's Workforce		
MONDAY   January 13, 2025			
7:30-8:45 a.m.	The Artificial Intelligence Era		
9:00-10:30 a.m.	Apprenticeship Panel Discussion— Attracting and Retaining Workers in the Trades		
10:45-11:45 a.m.	Understanding Grant Funding: Opportunities and Complexities	In Pursuit of Accreditation	
1:15-2:30 p.m.	Canadian Legal and Legislative Update	U.S. Legal and Legislative Update	Best Practices in Recruitment
2:45-4:00 p.m.	Canadian Fiduciary Responsibility in Apprenticeship Programs	U.S. Fiduciary Responsibility in Apprenticeship Programs	Best Practices in Retention
4:00-5:00 p.m.	Welcome Reception		

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




	U.S. and Canadian sessions
	U.S. content only
	Canadian content only



# PROGRAM AT A GLANCE

<b>TUESDAY</b>   January 14, 2025		
<b>7:30-8:45 a.m.</b>	Risk Management for Apprenticeship Programs	The Psychology of Learning—Understanding the Wants and Needs of Today’s Learners
<b>9:00-10:15 a.m.</b>	Financial Management Tools	Designing and Delivering Efficient and Effective Instruction
<b>10:30-11:45 a.m.</b>	The Business Side of Your Apprenticeship Program	Engage, Belong and Excel: Transformative Training Techniques for Instructors
<b>1:15-2:30 p.m.</b>	Know Your Policies	
<b>2:45-4:00 p.m.</b>	Roundtable Discussions	
<b>WEDNESDAY</b>   January 15, 2025		
<b>7:30-8:45 a.m.</b>	Canadian Guided Open Forum	U.S. Guided Open Forum
<b>9:00-10:15 a.m.</b>	Cybersecurity Best Practices	
<b>10:30-11:45 a.m.</b>	Mental Health Panel Discussion	

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

	U.S. and Canadian sessions
	U.S. content only
	Canadian content only

Early registration ends December 2, 2024. Register today at [www.ifebp.org/apprenticeshipinstitute](http://www.ifebp.org/apprenticeshipinstitute) to save US\$300!

# PRECONFERENCE WORKSHOP

## Understanding and Engaging With Your Apprentices, Journeyworkers and Today's Workforce

**Sunday, January 12, 2025**

8:00 a.m.-1:00 p.m.

We are clearly dealing with a different world as it relates to work—our own work and the work of others that we rely on. At the same time, there is a full range of expectations around work. This workshop will examine the changing workforce and help you understand how to evaluate and implement positive change in your apprenticeship program, fund office, job site or whatever work environment you are part of.

Topics include:

- Demographics of today's workforce
- Changing norms, expectations and desires
- Managing multigenerational issues
- Creating positive culture in the office and on the job site
- Supporting neurodivergent workers
- Harassment
- Policies
- Communication
- Do your benefits benefit your participants?
- Understanding your workforce
- Building a strategy for change.

### Speaker:



**Lauri Rollings**

CEO

Lauri Rollings and  
Associates, LLC  
Whitefish Bay, Wisconsin

**Separate registration for the preconference is required.**

Save US\$150 if you register by December 2, 2024.

Through December 2, 2024    Member: US\$540 | Nonmember: US\$650  
After December 2, 2024    Member: US\$690 | Nonmember: US\$800

## PROGRAM SCHEDULE

### SUNDAY | January 12, 2025

7:00-8:00 a.m.

#### **Preconference Registration and Continental Breakfast**

8:00 a.m.-1:00 p.m.

#### **Preconference Session: Understanding and Engaging With Your Apprentices, Journeyworkers and Today's Workforce**

*(Separate registration is required.)*

4:00-6:00 p.m.

#### **Registration/Information**

### MONDAY | January 13, 2025

6:30-7:30 a.m.

#### **Registration and Continental Breakfast**

7:30-8:45 a.m.

#### **The Artificial Intelligence Era**



AI is here, it's everywhere and its implications are many. This session will discuss how AI has evolved and how it's impacting your industry and the apprenticeship world. Take away an understanding of the challenges and possibilities.



#### **C. Anton Ames**

Data and Information Systems  
Management Consultant  
Anton Ames Group  
Omaha, Nebraska

## MONDAY | January 13, 2025 *(continued)*

9:00-10:30 a.m.

### **Apprenticeship Panel Discussion— Attracting and Retaining Workers in the Trades**



This session will feature a panel of apprentices and early career journeyworkers sharing their personal stories and providing insights on what motivates them. They will also discuss what they want out of their relationship with an apprenticeship program/union/employer. Take away an understanding of what is driving the next generation of workers so you can design your recruitment and retention efforts to be mutually beneficial.

10:45-11:45 a.m. | concurrent sessions

### **Understanding Grant Funding: Opportunities and Complexities**



New initiatives and growth in many apprenticeship programs are made possible through funding provided by grants. This session will help you identify where to find grant funding and provide an overview of how grants operate. Topics include:

- Legislated grant opportunities
- Other grant sources
- Applying for grant funding
- Reporting and oversight
- Challenges and best practices.



### **In Pursuit of Accreditation**

This session will provide an overview of the accreditation process, including:

- Why consider accreditation
- Understanding the accreditation process
- Challenges that will arise
- Best practices.

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[www.ifebp.org/apprenticeshipinstitute](http://www.ifebp.org/apprenticeshipinstitute)



## MONDAY | January 13, 2025 *(continued)*

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

**Lunch** *(provided)*

1:15-2:30 p.m. | concurrent sessions

### Canadian Legal and Legislative Update



This session will provide an update on the Canadian legal, legislative and regulatory environment, including:

- Relevant laws and regulations you need to be complying with
- Industry activity to pay attention to
- Provincial initiatives.

### U.S. Legal and Legislative Update



With the presidential election over and a new administration taking office, there are many questions about how registered apprenticeship programs will be impacted. This session will provide insights on the current and future environment to help you plan for what lies ahead. The panel discussion will address:

- Update on the Advisory Committee on Apprenticeship
- Update from the Office of Apprenticeship (OA) National Office
- How apprenticeships may be impacted by the new administration
- Legislative and regulatory activity impacting registered apprenticeship programs.

### Best Practices in Recruitment



This session will feature a spotlight on successful recruitment programs and discuss best practices for:

- Developing your strategy and messaging
- Outreach to targeted audiences
- Pre-apprenticeship programs
- Partnership opportunities.

## MONDAY | January 13, 2025 *(continued)*

2:45-4:00 p.m. | concurrent sessions

### Canadian Fiduciary Responsibility in Apprenticeship Programs



This session will help Canadian apprenticeship trustees understand the role and responsibilities in managing a training trust fund. Topics include:

- Who is a fiduciary
- Best practices for good governance
- Common fiduciary challenges.

### U.S. Fiduciary Responsibility in Apprenticeship Programs



This session will provide an overview of fiduciary responsibility and review the applicable laws and regulations that apprenticeship trustees must be aware of and adhere to. The session will cover:

- Legal framework and governing documents
- Fiduciary responsibility
- Best practices for good governance
- Introduction to prohibited transactions
- The two-hat dilemma
- Proposed 29 CFR Part 29
- Common fiduciary challenges
- Important legal cases.

### Best Practices in Retention



This session will feature a spotlight on successful retention programs and discuss best practices for:

- Developing your retention strategy
- Advising and mentoring your apprentices
- Addressing issues in the classroom and on the job site.

4:00-5:00 p.m.

### Welcome Reception



**TUESDAY, January 14, 2025**

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6:30-7:30 a.m.

## **Registration and Continental Breakfast**

7:30-8:45 a.m. | concurrent sessions

## **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.

## **The Psychology of Learning— Understanding the Wants and Needs of Today's Learners**



So much has been learned over the past decade about how personality types and learning styles impact a person's ability to learn. This session will help you understand the most current approaches to student learning and development. Topics include:

- The spectrum of neurodivergence
- Assessment tools
- Meeting learners where they are
- Strategies for success.

**Register Online at**  
**[www.ifebp.org/apprenticeshipinstitute](http://www.ifebp.org/apprenticeshipinstitute)**

## TUESDAY, January 14, 2025 *(continued)*

9:00-10:15 a.m. | concurrent sessions

### Financial Management Tools



Designed for training directors and coordinators, this session will focus on the tools you have to manage the business side of your apprenticeship program, including:

- Accounting and budgeting
- Cost tracking
- Dashboards
- Leveraging plan professionals and other resources.

### Designing and Delivering Efficient and Effective Instruction



This session will focus on how instructors can create instruction that not only effectively develops skills for their apprentices but also helps retention through active learning. The session objectives will include:

- Understand diverse learning styles and needs
- Design effective instruction through the DACUM system
- Maximize technology and leverage existing resources
- Make training more efficient through modularization
- Learn strategies for engagement and motivation
- Best practices for evaluation and continuous improvement.

10:30-11:45 a.m. | concurrent sessions

### The Business Side of Your Apprenticeship Program



This session will look at the business side of apprenticeship programs for trustees, directors and others who have a role in the oversight and management of these programs. Topics include:

- Financial statements
- High-level oversight
- Internal controls
- Fraud and abuse.

## TUESDAY, January 14, 2025 *(continued)*

10:30-11:45 a.m. | concurrent sessions *(continued)*

### Engage, Belong and Excel: Transformative Training Techniques for Instructors



During this highly interactive and engaging presentation, participants will learn to transform apprenticeship education. By focusing on engagement; belonging; and practical, innovative training methods, you can help shape the structure and growth of apprenticeship programs. Learning objectives include:

- Identifying the challenges in developing today's workforce
- Discovering ways to deliver cognitive content through active engagement
- Exploring how active engagement can increase the sense of belonging and improve retention.

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

### Lunch *(provided)*

1:15-2:30 p.m.

### Know Your Policies



You run a trust fund that has a certain set of policy requirements. At the same time, you are running a school that has an altogether different set of policies. You are also running a business that requires yet another set of policies. This session will address:

- Checklist of policies you should have
- Components of a good policy
- Policy development, implementation, documentation and oversight
- Common policy challenges.

2:45-4:00 p.m.

### Roundtable Discussions



This time frame is designed to provide attendees with an opportunity to participate in roundtable discussions based on your role. The idea is to provide a facilitated but self-directed opportunity to discuss issues of mutual interest. You will be assigned a table based on one of the following: trustees, apprenticeship directors/coordinators, apprenticeship instructors and general. Each table facilitator will compile a list of key takeaways that will be shared with all conference attendees.

## WEDNESDAY, January 15, 2025

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6:30-7:30 a.m.

### Registration and Continental Breakfast

7:30-8:45 a.m. | concurrent sessions

### Canadian Guided Open Forum



An open discussion of Canadian issues that are relevant to training trust funds, this session will provide a forum to address the most pressing issues that trustees, administrators, coordinators, instructors and directors are dealing with today.

### U.S. Guided Open Forum



An open discussion of U.S. issues that are relevant to training trust funds, this session will provide a forum to address the most pressing issues that trustees, administrators, coordinators, instructors and directors are dealing with today.

9:00-10:15 a.m.

### Cybersecurity Best Practices



You have plenty of data to protect, from trust fund information to student records. Be proactive in looking at your vulnerability to a cyberattack. This session will cover:

- DOL guidance
- Assessment and penetration testing
- Dealing with a breach
- Insurance coverage and claims
- Basic things to do to protect yourself
- Internal controls.

10:30-11:45 a.m.

Closing Session

### Mental Health Panel Discussion



The mental health epidemic is impacting apprenticeship programs both in the classroom and on the jobsite. This session will provide a forum to discuss the scope of these problems and identify solutions, interventions and strategies to make a difference in your programs and for your people.

# Hotel Information



**Name:** Disney's Yacht & Beach Club Resorts

**Reservation Deadline:** December 20, 2024

**Rate:** US\$359 single/double occupancy

**Hotel Accommodations:** Hotel reservations must be made directly with the Disney's Yacht & Beach Club Resorts. To do so, please visit **[www.ifebp.org/apprenticeship-hotel](http://www.ifebp.org/apprenticeship-hotel)** to book your hotel reservations online. For hotel questions, contact the Registration Department at (888) 334-3327, option 2, or [edreg@ifebp.org](mailto:edreg@ifebp.org).

Note: Hotel room availability is not guaranteed outside of scheduled program dates.

## Disney's Yacht & Beach Club Resorts Orlando, Florida

The Institute for Apprenticeship, Training and Education Programs will be held at Disney's Yacht & Beach Club Convention Center. The International Foundation has secured a low room rate of US\$359 for Institute attendees at Disney's Yacht & Beach Club Resorts, adjacent to the convention center.

Evoking the timeless era of New England seaside hotels from the late 1800s, Disney's Yacht & Beach Club Resorts welcome guests into a world of hardwood floors, brass fittings and luxurious accommodations. Anchored along the shores of the 25-acre Crescent Lake, the resorts offer casual elegance combined with serene grounds and nautical touches that transport guests to another place and time. When seeking a little unique recreation, guests can soak up the sun on the white sand beaches lakeside or cool off at Stormalong Bay—a unique, 750,000-gallon feature pool complete with water slide, sandy bottom, whirlpools and water current.

# Conference Sponsorships

## Connect With the Decision Makers in the Trades!

Increase your brand exposure to decision makers in the trades! Gain brand recognition with a high-visibility conference sponsorship.

Network with 450+ attendees learning efficient trust fund management and best practices for apprenticeship programs in the U.S. and Canada. These include labor and management trustees; training directors, coordinators or instructors; Joint Apprenticeship Training Committee (JATC) members; workforce development professionals; and more. They serve apprenticeship programs in the construction, education, entertainment, health care, hospitality, manufacturing, public sector and service industries.

Don't miss this opportunity to show that you support those working in the trades.

All levels include a complimentary and/or discounted registration along with recognition on our conference web page, in preconference emails, in on-site signage, with a company listing in our conference app, on-site brochure display and more!

### Industries to Support:

- Construction
- Education
- Entertainment
- Health care
- Hospitality
- Manufacturing
- Public sector service





## Gold Sponsorships

### ***Attendee Luncheon***

Your company name and logo featured on conference signage in high-traffic areas, on table tent cards placed on attendee tables and at lunch buffet stations at the sponsored event.

### ***Sponsorship of Conference App (Exclusive)***

Your company logo will appear on the splash screen each time attendees open the app and on signage located in high-traffic areas of the venue.

### ***Specialty Conference Bundle Discount***

Sponsor any three or more specialty conferences at the Gold Level within a calendar year and receive a 20% discount on each sponsorship.



## Silver Sponsorships

### ***Continental Breakfast***

Your company name and logo featured on conference signage in high-traffic areas, on table tent cards placed on attendee tables and at breakfast buffet stations at the sponsored event.



## Bronze Sponsorships

### ***Refreshment Break***

Your company name featured on conference signage in high-traffic areas and on table tent cards placed on refreshment stations at the sponsored event. Includes a listing in the conference app featuring your company description, contact information and more!



To learn more on showcasing your brand to this audience, contact Diane Mahler, Manager, Sponsorship and Advertising, at [dianem@ifebp.org](mailto:dianem@ifebp.org).

# Apprenticeship Resources

## Financial Skills for Life

[www.ifebp.org/skills-for-life](http://www.ifebp.org/skills-for-life)

In this online course that helps apprentices build a solid financial foundation, students will learn how to:

- Understand banking
- Create and adjust a budget
- Start an emergency fund
- Save for retirement
- Fund major purchases
- Compare types of debt
- Assess the risks of credit cards
- Create a debt repayment plan
- Understand credit scores
- Use insurance coverage
- Protect against identity theft.

## Apprenticeship Toolkit

[www.ifebp.org/apprenticeshipresources](http://www.ifebp.org/apprenticeshipresources)

The International Foundation offers additional resources to support training directors, program coordinators and labor/management trustees.

- Apprenticeship news
- External resources
- Articles, papers and research
- Training for your participants
- Educational opportunities for plan sponsors
- Apprenticeship Program Answer Guide

## Designing Curriculum to Close the Skills Gap

Brookfield, Wisconsin | July 22-23, 2025

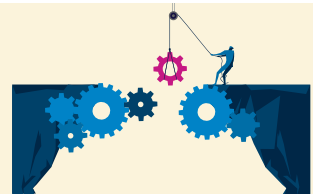
San Diego, California | November 2025

*(prior to the 58th Annual Canadian Employee Benefits Conference)*

[www.ifebp.org/skills-for-life](http://www.ifebp.org/skills-for-life)

This two-day course is designed to help seasoned and new professionals improve the development, delivery and evaluation of learning by providing a proven process to incorporate into their apprenticeship program.

- Learn how to improve apprenticeship program performance with greater learner efficiency, effectiveness and engagement.
- Gain a foundation in analysis to ensure your training initiatives are aligned and have the impact you and your program expect.
- Build a curriculum road map that will prepare your program for success today and in the future.



Register today! [www.ifebp.org/skills-gap](http://www.ifebp.org/skills-gap)

## REGISTRATION

Go to [www.ifebp.org/apprenticeshipinstitute](http://www.ifebp.org/apprenticeshipinstitute) to register.

### CONFERENCE REGISTRATION FEES

*Save US\$300 if you register by December 2, 2024.*

Through December 2, 2024    Member: US\$1,750 | Nonmember: US\$2,080  
After December 2, 2024        Member: US\$2,050 | Nonmember: US\$2,380

### **Separate registration for the preconference is required.**

*Save US\$150 if you register by December 2, 2024.*

Through December 2, 2024    Member: US\$540 | Nonmember: US\$650  
After December 2, 2024        Member: US\$690 | Nonmember: US\$800

### REGISTRATION INCLUDES

Continental Breakfasts | Lunches | Beverage Breaks

## POLICIES

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 (8 days for Disney properties) of arrival. Registration fee is forfeited once the program commences. Visit [www.ifebp.org/policies](http://www.ifebp.org/policies) for more details and to view the current policy.

## CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must register for the program and request CE credit at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency.

Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2, or email [continuinged@ifebp.org](mailto:continuinged@ifebp.org).



Educational sessions at this program can qualify for self-reported CEBS® Compliance credit. Visit [www.cebs.org/compliance](http://www.cebs.org/compliance) for additional information.





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**Apprenticeship**  
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**January 13-15, 2025**

Orlando, Florida

**Register Today!**

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18700 West Bluemound Road  
Brookfield, WI 53045



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