

Innovation Grant

Applicant	Scott Stephens
Applicant ID	APP-000405
Company Name	Idaho State University
Recipient Address	Idaho State University 921 South 8th Avenue Mail Stop 8101 Pocatello, ID 83209-8101
Email	stepscot@isu.edu
Funding Requested	\$21,945.00
Status	Submitted
Funded	<input type="checkbox"/>

Application Title: ISU Innovation Grant

Review Notes:

12/22/2020 Grant Review Committee Notes

Idaho State University – Innovation Grant

Idaho State University Continuing Education and Workforce Training has applied for an innovation grant to create a test preparation program for the Property and Casualty Licensure exam that will use storytelling and visual animation. This program will make it easier for individuals to process and retain the concepts of property and casualty insurance. The Southeast Idaho Region is home to two major insurance provider centers, Allstate Call Center and Idaho Farm Bureau Mutual Insurance. Both employers have expressed frustration in finding qualified individuals to work as agents in their companies. Furthermore, due to changes to the laws and regulations surrounding the insurance industry, policy processing clerks working in property and casualty insurance agencies are required to have a Property and Casualty license to make any adjustments to policies relating to clients' property. This requires independent agencies to hire licensed individuals or train current staff to pass the test in order to work as processing clerks.

WDTF Request: \$21,945

ISU is going to be training 50 people, 25 of which will be incumbent workers.

Idaho Power has been using a similar format. The format is interactive and engaged versus sitting in a PowerPoint presentation. Interactive programs tend to have more of an impact on learners. This program is geared to all different types of learners.

ISU is trying to come up with a better way to train individuals because the individuals are not passing their licensing exam.

The funds are going to be used as startup funds. ISU is not charging participants for the first year, but students will be charged in the future to keep the program sustainable. ISU will also be sharing the program with other workforce training centers across the state.

Is this a big deal in this region because of the Farm Bureau and Allstate? Is this an issue in other areas of the state?

- The Labor insight shows there is a statewide need. Even in rural counties and larger areas need training.

Is the training going to need to be updated every year or will it be able to last 10-15 years?

- Mr. Thomsen did not get the longevity of the training from ISU. Any content that is specific to what is required under law and policy will need to be updated as law and policy is updated.

This could take the place of the other standalone trainings that someone could decide to choose or is this more of a study tool after the training?

- It is to replace the current training. It is a start-to-finish training.

There are several letters of intent from other organizations. What are they agreeing to?

- Innovation grants require that there is community involvement. There is no measure of how much community involvement is required. ISU has several employers who are saying they would hire as well as provide support to this program.

- It is important that ISU is ensuring the training is relevant and are working with so many different employers.

Motion by Ms. Griffin to recommend approval of the ISU Innovation Grant in the full amount of \$21,945. Second by Mr. Greene. Motion carried.

Contact Information

Question: Lead entity legal name

Idaho State University

Question: "Doing business as" entity name (if Applicable)

Idaho State University

Question: Federal Tax ID Number

82-6000924

Question: Street address

921 South 8th Avenue Mail Stop 8046

Question: PO Box (If applicable)

Not Answered

Question: City

Pocatello

Question: State

ID

Question: Zip Code

83209-8046

Question: Website

isu.edu

Question: First name of person to be contacted about this application

Scott

Question: Last name

Stephens

Question: Job title

Business Consultant

Question: Street address

921 South 8th Avenue Mail Stop 8380

Question: City

Pocatello

Question: State

ID

Question: Zip code

83209-8380

Question: Email address

stepscot@isu.edu

Question: Contact phone

208-282-3372

Project Overview

Innovation grants can fund projects that address local workforce development needs. Projects may provide skills training to individuals and/or assist individuals with connecting to careers.

Question: Please provide a brief overview/executive summary addressing what you're trying to accomplish with this project. (You are limited to 2000 characters for this section so please be concise.)

- Idaho State University Continuing Education and Workforce Training will create a test preparation program for the Property and Casualty Licensure exam that will use storytelling and visual animation. This program will make it easier for individuals studying to take the exam to process and retain the concepts of property and casualty insurance. This will increase their capability to pass the exams and become licensed in property and casualty insurance and eligible to work in the industry.

The Southeast Idaho Region is home to two major insurance provider centers, Allstate Call Center and Idaho Farm Bureau Mutual Insurance. Recent discussions with the Idaho Farm Bureau Headquarters Training department and the Allstate Call Center revealed a shortage of licensed insurance professionals in the area. Both departments expressed frustration in finding qualified individuals to work as agents in their companies. Furthermore, due to changes to the laws and regulations surrounding the insurance industry, policy processing clerks working in property and casualty insurance agencies are required to have a Property and Casualty license to make any adjustments to policies relating to clients' property. This requires independent agencies to hire licensed individuals or train current staff to pass the test in order to work as processing clerks.

Due to this situation both Allstate and Farm Bureau agreed to work on a program to develop a local property and casualty test preparation program. Farm Bureau specifically allowed their training manager to work with Idaho State University Continuing Education and Workforce Training to create a curriculum and teach an in-person class to gauge interest in Property and Casualty test preparation services. The initial class was well attended but the instructors (one

from Idaho Farm Bureau and One from ISU CEWT) found that the time allotted was insufficient. They needed more time to prepare the students and instill confidence to help them pass

Question: If training is part of the project, how does it address specific employer-identified skills gaps in the community?

- Training is the primary reason for the project. Currently no local programs exist to provide test preparation assistance to individuals seeking employment in the insurance industry. A thorough review of the Jobscape portal on the Idaho Department of Labor website indicates that Insurance Agents and Insurance Claims and Policy Processing Clerks are in high demand in Region Five (Southeast Idaho). This corroborates with the what both Allstate and Idaho Farm Bureau have expressed in recent discussions. Individuals are left with the only option to order books online and create a personal study system or sign-up for an online study program that may not be specific enough for the state of Idaho exam. Both these options inhibit many individuals entering the industry. Many want a local program where they have someone they can reach out to when they struggle learning a concept. Without this option many potentially good employees decide not to go into the insurance industry.

Question: Workforce Development Training Funds are intended to supplement, but not supplant or compete with resources available through existing programs. Are there existing resources available to meet the employers' needs? How are those resources lacking?

There are no formal local programs in the region. The only way an individual can prepare to take the property and casualty licensure tests is through a self-study program or online web-based package.

Question: What employment opportunities does the project seek to fill?

The Idaho Department of Labor website Jobscape indicates that insurance sales agents and Insurance Claims and Policy Processing Clerks are in high demand in the Southeast Idaho. Furthermore the same site indicates that these jobs have an average salary of \$46,000 and \$32,000 respectively. Historically, in Southeast Idaho there are 32 annual openings for insurance agents and 12 annual openings for Insurance Claims and Policy Processing Clerks. However, with an aging workforce both of these professions are expected to rise.

Question: How will the project accelerate the pathway to a career for individuals being trained.

The Idaho Department of Labor website Jobscape indicates that insurance sales agents and Insurance Claims and Policy Processing Clerks are in high demand in the Southeast Idaho. This corroborates with the employment opportunities at the Allstate Call Center and Farm Bureau Headquarters. Furthermore, the same site indicates that these jobs have an average salary of \$46,000 and \$32,000 respectively.

Question: How will the project change and/or enhance the current landscape of Idaho's talent pipeline/development efforts.

This program can be combined with other educational and professional programs throughout the state to create highly professional insurance representatives. Due to the fact that the modules

will be stored on Idaho State University Continuing Education and Workforce Trainings server these modules can be accessed by anyone throughout the state.

Question: Who will provide the training and/or implement the project?

Idaho State University Continuing Education and Workforce Training will conduct the training. However, other educational institutions can access these modules and use them in a similar format.

Question: Where will the training be provided/project be implemented?

The training will be hosted by Idaho State University Continuing Education and Workforce Training. Students will be either able to access the training online or in a formal in-person training program.

Question: Who will benefit from this project, (Examples - adult job seekers, high school seniors, current employees)?

Beneficiaries of this project will be anyone interested in entering the insurance industry and people already employed in the industry but lack the appropriate licensing. These individuals include but are not limited to adult job seekers, high school seniors, college students, college graduates, and current employees.

Question: List any prerequisites for individuals interested in participating in the project.

Individuals must have a high school diploma and be qualified to work in the insurance industry.

Question: How will participants be selected? What are the agreed-upon screening processes, if any?

Participants will mostly self-select, however, for the initial program employees of various insurance agencies that are not currently licensed maybe asked to participate by their employer.

Question: What outreach efforts will the team use to encourage under-served populations to participate in the project?

Once the program is ready a marketing effort will be conducted by Idaho State University Continuing Education and Workforce Training. The marketing effort will include contacting the local Vocational Rehabilitation offices, Idaho Department of Labor, MAXIMUS and other agencies that work with the under-served populations in the community.

Question: Please provide a detailed description of why funding is needed for this project?

Funding is needed for this project to animate the story and provide voice over work for the characters. Other aspects of this project will be funded as in-kind.

Animation - Southeast Idaho is home to some talented professional animators. This project will work with one of these. This individual will require compensation for their talents and time towards this project.

Voice Over – The animation will require voice over work by a voice over actor. This individual will require compensation for their talents and time towards this project. Talent for this will also

be sourced from Southeast Idaho.

Instructional content – (in-kind) there are several subject matter experts in property and casualty insurance in the Southeast Idaho region that are capable of creating relevant and thorough content for a property and casualty licensure test prep program. Many of them are insurance agents that are in need of finding qualified employees. These individuals are willing to contribute their efforts in creating the content as an in-kind donation.

Story format – (in-kind) we know from education experts that one of the best ways to digest, understand, and remember instruction is to have it provided in a story. To take the content and put it in story form will take creative writers. Idaho State University Continuing Education and Workforce Training employs one creative writer and is willing to donate a portion of her time to this project as an in-kind donation.

Question: Will participants be charged to participate in this project?

For the first year participants will not be charged to access the online material. However, after the first year for sustainability purposes participants will be charged \$75 to access the modules.

Community-Based Team

Innovation Grants require participation from a community-based team with representation and support from business, education and other community partners as an ideal partnership.

[Letter of Intent](#)

Question: Please describe how the community-based team partners are involved in the project.

Community partners will assist in developing the content of the program, specifically the insurance concepts. They will also enroll employees, not already licensed, to test the program once it is finished.

Question: Number of employer partners involved in this project?

5.00

Question: Number of non-employer partners involved in this project?

Not Answered

Question: Please upload completed Letter of Intent from each community-based partner. A link to the Letter of Intent is provided above.

[Ruben_Guzman.pdf](#) (10/20/2020 9:17 AM)

[Moore-Letter_of_Intent.pdf](#) (10/20/2020 9:17 AM)

[Gabe_Allen.pdf](#) (10/20/2020 9:17 AM)

[Farm_Bureau.pdf](#) (10/20/2020 9:17 AM)

[DonWF.PDF](#) (10/20/2020 9:16 AM)

Project Sustainability

Question: If the community has plans to sustain the project beyond the life of a Workforce Development Innovation Grant, please share. (Not a requirement to receive grant funds.)

Idaho State University Continuing Education and Workforce Training will house the modules on its website that will be accessible on a continual basis. ISU CEWT will also offer in-person classes on a semester basis for individuals more comfortable learning in a traditional format. The modules will be used as a visual text book for the in-person classes.

Project Schedule

Please provide anticipated numbers/methods to assess the effectiveness of the proposed project.

[Project Schedule Form](#)

Question: Please provide an anticipated project start date.

1/4/2021

Question: How many training sessions/events will be held during the 12 months of the grant?

3 Training Sessions

Question: Please download and complete the project schedule form. The completed form can be uploaded here. To download the form click on the link provided above.

[Innovation_Grant_Project_Schedule.xlsx](#) (10/20/2020 10:04 AM)

Project Outcomes

Question: How will employer satisfaction be measured?

Employer satisfaction will be measured in two ways. 1) Insurance agents from the surrounding area will be invited to a lunch to review the program and provide feedback. 2) How well their employees are prepared to pass the licensure exam.

Question: How will participant satisfaction be measured?

Participant satisfaction will be measured through an eval survey that will ask how well they enjoyed the program and if they felt it prepared them to take the test.

Question: Total number of individuals served by this project?

50.00

Question: Number of individuals receiving credential(s)?

50.00

Question: Number of individuals already employed who will receive training?

25.00

Question: Anticipated wage gain for individuals already employed? If applicable.

4.00

Question: Anticipated starting hourly wage for individuals entering employment? If applicable.

15.00

Question: What additional metrics do you propose to gather to measure the success of the project?

Passing Rate of the Property and Casualty Licensure Exam for participating individuals

Budget

The application must provide a detailed explanation of how grant resources will be used to directly support the identified skills training. Provide the line item budget amount and detailed narrative for each item listed below to delineate how Innovation Grant resources will be used. Each line item's narrative should clearly describe how the line item amount was determined, as well as the necessity of the line item to develop/deliver the project.

[Budget Sheet](#)

Question: Why do you think WDTF is a good source of funding for this project?

Due to the high demand for insurance agents and policy processing clerks in Region Five and that these jobs are good paying jobs it makes sense to invest into a local program that can assist in obtaining the appropriate licensure. Being licensed as a property and casualty agent is a step towards self-sufficiency for many community members of Southeast Idaho.

Question: How else have you sought to fund this project?

Idaho State University Continuing Education and Workforce Training has considered using proceeds from other trainings and classes to develop this program. Also, ISU CEWT has looked

into other grant opportunities specifically related to the insurance industry. Unfortunately, these opportunities are not currently available.

Question: Please download the attached budget. A link to the budget is provided above. Once completed, upload budget here.

[OCT20_PC Grant Budget \(4\).xlsx](#) (12/16/2020 1:48 PM)

Organizational and Fiscal Capacity

Question: Provide the accounting structure, job titles and qualifications of staff responsible for fiscal actions.

Grants are managed with ISU's Grants and Contracts Accounting Office along with the Project Director and departmental Grants Administrator. All staff are qualified and have years of experience managing grant funds. Team members will work closely with ISU's Grants and Contracts Accounting Office to submit all financial reports. As with all universities, there is a specific structure in place to ensure that all programs are in line with their contracts, accountability is provided, and A-133 audit requirements are met. All grant proposals at the University are reviewed in order to ensure that the funding source is in line with the greater ISU mission, controls are in place to adequately administer the grant, and personnel working on the project are aware of the rules and regulations.

Question: Please provide a short summary outlining your organizations capacity to complete this project.

Idaho State University Continuing Education and Workforce Training has a reputation for implementing effective training programs in several different industries. Having access to talent and resources available through Idaho State University and having the support of the local insurance community gives CEWT confidence in completing this project. ISU CEWT will dedicate their Business Consultant as the project manager of this program as well as their outreach representative to facilitate working with community partners in the insurance industry. An animation professional has already been identified and is willing to work with ISU CEWT on this project. Also, CEWT's creative writer will assist in developing the overall story.

Question: Upon request, the lead organization may be asked to provide a statement from the entity's independent auditing firm regarding the entity's most recent fiscal audit to include a statement of any audit findings. Is an audit available?

Yes

No

Tracking and Reporting

Innovation Grant funds must be expended within a one-year time period. Quarterly tracking and reporting of individuals participating in the project will be required. Individual names, start and end dates, and outcome data must be collected and reported.

Question: Entity responsible for tracking and reporting.

Idaho State University Workforce Training

Question: Contact Person First Name

Scott

Question: Contact Person Last Name

Stephens

Question: Job Title

Business Consultant

Question: Contact Phone

208-282-3026

Question: Email Address

stepscot@isu.edu

Question: Street Address

921 South 8th Avenue Mail Stop 8380

Question: City

Pocatello

Question: State

ID

Question: Zip Code

83209-8380

Terms and Conditions

[Terms and Conditions](#)

Question: I certify I have read the terms and conditions governing the Workforce Development Training Fund grant and agree to comply if awarded a training grant. Click on the link above to view a copy of the terms and conditions.

Yes

No