

Palm Beach State College  
**Financial Services Business Partnership Meeting**  
**Minutes**

Date: April 26, 2013  
Room: ETA 101  
Time: 9-10 a.m.

**Attendance:**

- |  |   |  |  |
|--|---|--|--|
| <input checked="" type="checkbox"/> David Knopp  | <input checked="" type="checkbox"/> Donald Keller         | <input checked="" type="checkbox"/> Gwen Nicholson | <input checked="" type="checkbox"/> Janine Spiegelman  |
| <input type="checkbox"/> Barbara Masi            | <input type="checkbox"/> Lou Ludwig                       | <input type="checkbox"/> Kenn Norberg              | <input checked="" type="checkbox"/> Christine Thompson |
| <input checked="" type="checkbox"/> Hustad, Leon | <input checked="" type="checkbox"/> Jo Ann Mazzeo (guest) |  |  |

**ITEM 1. Welcome, Introduction of Members, and Announcements**

**Discussion:**

Gwen presented a newly-created brochure on the Business & Office Management Programs at Palm Beach State College as well as a copy of the generic program flyer created by the college's Community Relations and Marketing (CRM) Division for the Real Estate and Insurance PSAV programs. CRM also has developed some marketing banners that can be used for community outreach events. A copy of the Summer Term Class Schedule for both Real Estate and Insurance was also discussed. She mentioned that enrollment has increased for the Real Estate Sales Agent program but some of the enrolled students never submit course fee payment and are dropped from enrollment. Gwen presented a handout which outlines three new Bachelor degree concentration areas:

- Project Management and Entrepreneurship under the Supervision and Management B.A.S program
- Project Management concentration in the Information Management B.A.S. program

Gwen also discussed the new "STEAM" Initiative underway at Palm Beach State College which attempts to draw students into the Science, Technology, Engineering, Arts, and Mathematics academic programs.

**Data Source:** Business & Office Management Brochure; Summer Term Class Schedule; Handout on new Bachelor program concentration areas

**Action:**

N/A

**ITEM 2. Real Estate**

**Discussion:**

**CAM (Community Association Manager)**

Gwen questioned council members on whether or not there is currently a demand for instructional courses in Community Association Management. Janine mentioned that some area private companies are offering this course of training and there was a consensus among members that the College should look into offering a similar program. Gwen said that this type of program would need to be offered under Continuing Education and she had been told not to offer any more continuing education courses.

**PSAV 45-hour Post –Licensure Course**

Gwen stated that the State now has a new PSAV 45-hour Post-Licensure Real Estate program and she is interested in offering it at Palm Beach State. It could be offered at a cost of only \$125.10 for Florida residents, a very competitive price. She discussed a handout which outlines the curriculum Framework for the program. Council members suggested marketing this program to previous Real Estate students as well as area real estate offices.

**Assessment Outcome Report – David Knopp**

David Knopp explained that the College conducts annual program reviews and he presented a copy of the report findings to members. It showed that the year 2010 had the greatest number of course Certificates awarded and generated the most FTE. David discussed the various program learning outcomes for the Real Estate Agent

program and there are three measures that must be met in order to get Perkins Grant funding and currently these measures are not being met. Gwen stated that If an enrolled student fails to submit a High School diploma, the College does not consider them a program completer. However, the State of Florida does not have this requirement. Many of the real estate program students already possess a college degree. Discussion followed.

**Data Source:** "Curriculum Framework" handout for Real Estate Post licensing program; Assessment Outcome Report.

**Action:** Gwen will follow up with the College Curriculum Committee to see if a CAM program can be offered at Palm Beach State College. She will also submit a formal request at the Fall meeting of the College Curriculum Committee and the program could be slated to begin in January or August of 2014. Gwen will also follow up on offering a PSAV 45-hour Post Licensure program.

### **ITEM 3. Insurance**

**Discussion:**

David discussed the Assessment Outcome Report for the Insurance programs. The Insurance Customer Service Representative, Life, Health & Variable Annuities, and Property and Casualty programs are being reviewed because they did not have at least 10 completers. The Insurance Claims Adjuster program is doing well and Gwen mentioned that student completers are getting employment. She also stated that enrollment for the Insurance Customer Service Representative program has been increasing. A Royal Palm Beach insurance company will soon be opening a new call center which should drive up demand for Customer Service Reps. Also, changes in health care laws should increase demand for students with a 2.15 license. Gwen discussed a handout on Curriculum Framework for a PSAV Personal Lines Insurance Agent program that would be offered under the Finance career cluster. Discussion followed.

**Data Source:** Assessment Outcome Report for Insurance programs; Handout on PSAV Personal Lines Insurance Agent program

**Action:** N/A

### **ITEM 4. Marketing**

**Discussion:**

Gwen discussed how marketing efforts are always an issue due to less department funding available for this purpose. Current marketing activities include the following:

1. Email blasts to current and past students using email lists obtained from the IRE and other sources.
2. Flyer distribution at community events. Most recent event attended was "College is Possible" held on the Lake Worth campus on February 23.
3. Responding to incoming phone calls and emails from the public seeking program information.

She mentioned that the Real Estate Broker course has failed to run for several terms. Jo Ann mentioned that she has had some of her firm's employees obtain their Real Estate Broker license and she feels that with the local real estate market activity increasing and Agents have more discretionary funds to spend, they may be more likely to go on to attain their Broker license. She also felt that some Real Estate Agents are hesitant to take on the added responsibility of a Broker vs. a Sales Agent. Gold Coast Realty is heavily marketing their Real Estate students to pursue their Broker license at their school and Jo Ann suggested increasing our emarketing efforts to capture more of these potential students.

Leon inquired about the possibility of re-starting the College relationship with the Realtors Association of Palm Beach County to offer real estate courses. Gwen stated that since the Association has wanted an increase cut in the proceeds, that it was decided to end this relationship. Discussion followed.

**Data Source:**

**Action:** Gwen will follow up with the Curriculum Committee to see if it will be possible to re-establish a working relationship with the Realtors Association to offer future courses.

**ITEM 5. Other Issues**

**Discussion:**

1. **BPC Action Plan** – Gwen discussed the current 2013 Financial Services BPC Action Plan with members. The names of two new Council members have been submitted and are in the approval process. The new members are Jo Ann Mazzeo for Real Estate and Jeff Phifer for Insurance. Gwen suggested that the Council maintain the current established goals into the 2014 Action Plan. All members agreed.
2. **Potential new seminar offering** – Don introduced the idea of offering a short seminar to be offered to homeowners on “Understanding TRIM Notices”. He has offered these in the past with great success and it teaches homeowners how to challenge their home assessments. He feels that there is a great need for increase consumer education regarding this issue. Discussion followed. David questioned how such a program would be marketed to the public and Janine suggested targeting 55+ communities since senior citizens seem to have the most difficulty understanding their appraisal information.

**Data Source:** Handout of BPC Action Plan 2013;

**Action:**

Gwen to follow up.

**ITEM 6. Evaluation**

**Discussion:**

Evaluation forms for the Business Partnership Council were distributed and completed.

**Data Source:** BPC Annual Evaluation form

**Action:**

N/A

Respectfully submitted,

*Christine Thompson / Scribe*