PANEL PACKET

AUGUST 2016

STATE OF CALIFORNIA

ETP

EMPLOYMENT

TRAINING PANEL

TABLE OF CONTENTS

Panel Meeting of August 26, 2016

PRELIMINARY MATTERS

Directions to Meeting Site
Future Meeting Sites
Prior Meeting Minutes
Key Program Elements

REVIEW AND ACTION ON PROPOSALS

Consent Calendar ***Tab***

ADT LLC ---------- 1
ENGEO Incorporated ---------- 2
Erickson Framing CA LLC ---------- 3
National Veterans Transition Services, Inc. ---------- 4
Northern California Shop Ironworkers Local 790 Apprenticeship and Training Trust Fund ---------- 5
Northrop Grumman Technical Services, Inc. ---------- 6
Onestop Internet, Inc. ---------- 7
PAMC, Ltd. dba Pacific Alliance Medical Center, Inc. ---------- 8
Pyramid Berkeley Management L.P. dba Doubletree by Hilton Hotel Berkeley Marina ---------- 9
Rocket EMS, Inc. ---------- 10
SYSCO Ventura, Inc. ---------- 11
Total Transportation & Distribution, Inc. ---------- 12

Proposals for Single-Employer Contractors ***Tab***

North Hollywood Area Regional Office
AHMC San Gabriel Valley Medical Center LP ----------13
AHMC Whittier Hospital Medical Center LP ----------14
C. R. England, Inc.----------15
Holthouse Carlin & Van Trigt LLP----------16

San Diego Regional Office
Altman Specialty Plants, Inc.----------17
ARS National Services Inc.----------18
Optima Tax Relief, LLC----------19
Temecula Valley Hospital, Inc. dba Temecula Valley Hospital ----------20

San Francisco Area Regional Office
Juniper Networks, Inc. ----------21
On-Time Air Conditioning and Heating, Inc. dba Service Champions ----------22
Palo Alto Networks, Inc.----------23

Sacramento Area Regional Office
Aerojet Rocketdyne, Inc. ----------24
Bay Alarm Company ----------25
Health Net, Inc. ----------26
Sysco Sacramento, Inc. ----------27

Proposals for Multiple-Employer Contractors ***Tab***

North Hollywood Area Regional Office
Finishing Trades Institute of District Council 36 Joint Apprenticeship
Training Trust Fund ---------- 28

San Francisco Area Regional Office
Bay Area Video Coalition ----------29
San Francisco Electrical Industry Apprenticeship and Training Trust----------30

Amendments ***Tab***

Murrieta Chamber of Commerce ----------31

SUMMARY OF DELEGATION ORDERS

Delegation Orders ***Tab***

7th Inning Stretch LLC dba Stockton Ports
Applied Ceramics, Inc.
Attivo Group, Inc.
Bakersfield Baseball Club, LLC dba Bakersfield
Blaze Buster Biofuels LLC
Charles McMurray Co.
Dart NeuroScience LLC
Emerald Kingdom Greenhouse LLC
JBE International LLC
Nellson Nutraceutical, LLC
Procore Technologies, Inc.
Quality Controlled Manufacturing, Inc.
Quality First Home Improvement, Inc.
Saddleback Roofing, Inc.
SigmaTron International, Inc.
Stack Labs, Inc.
STK Architecture, Inc.
T.G.I.F. Body Shop Inc.
The Coca-Cola Company
Weatherby, Inc.

State of California

M e m o r a n d u m

To: Panel Members

Date August 26, 2016

From: Stewart Knox
Executive Director

File: Panel Memo Doc.

Subject: **Directions to Meeting Site**

The Employment Training Panel will meet on FRIDAY, **August 26, 2016 at 9:30 a.m.**

California Environmental Protection Agency
Coastal Hearing Room, 2nd Floor
1001 I Street
Sacramento, CA 95814
Telephone (916) 327-5640 (ETP Central Office)
FAX: (916) 445-5972 (ETP Central Office)

Directions to the California Environmental Protection Agency - Sierra Hearing Room

From Sacramento International Airport:

- Take **Hwy 5** South
- Exit on **"J" Street** to **11th St.**
- Turn Left on **11th Street**
- Turn Left on **I Street**
- **1001 I Street**

From San Francisco

- Take **I-80 E**
- Merge onto **I-5 N**
- Exit on **"J" Street** to **11th St**.
- Turn Left on **11th Street**
- Turn Left on **I Street**
- **1001 I Street**

M e m o r a n d u m

To: Panel Members

Date August 26, 2016

From: Stewart Knox
Executive Director

File: Mtg. Site Memo

Subject: **Future Meeting Sites**

August 26, 2016	**California Environmental Protection Agency** **Time: 09:30 AM** **Coastal Hearing Room, 2nd Floor** **1001 I Street** **Sacramento, CA 95814**
September 23, 2016	**California Environmental Protection Agency** **Time: 09:30 AM** **Coastal Hearing Room, 2nd Floor** **1001 I Street** **Sacramento, CA 95814**
October 28, 2016	**California Environmental Protection Agency** **Time: 09:30 AM** **Sierra Hearing Room, 2nd Floor** **1001 I Street** **Sacramento, CA 95814**
November	**NO PANEL MEETING IN NOVEMBER**

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL
California Environmental Protection Agency
1001 I Street
Sierra Hearing Room, 2nd Floor
Sacramento, CA 95814
July 22, 2016

PANEL MEMBERS

Barry Broad
Chair

Janice Roberts
Vice-Chair

Gloria Bell
Member

Sonia Fernandez
Member

Leslie McBride
Ex-Officio Member

Gretchen Newsom
Member

Edward Rendon
Member

Sam Rodriguez
Member

Executive Staff

Stewart Knox
Executive Director

Maureen Reilly
General Counsel

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL
California Environmental Protection Agency
1001 I Street
Sierra Hearing Room, 2nd Floor
Sacramento, CA 95814
July 22, 2016

I. PUBLIC PANEL MEETING CALL TO ORDER

Chairman Broad called the meeting to order at 9:36 a.m.

II. ROLL CALL

Present
Gloria Bell
Barry Broad
Will Koch (on behalf of Leslie McBride)
Edward Rendon
Janice Roberts
Sam Rodriguez (arrived after initial roll call at 9:47 a.m.)

Absent
Sonia Fernandez
Gretchen Newsom

Executive Staff Present
Stewart Knox, Executive Director
Maureen Reilly, General Counsel

III. AGENDA

Chairman Broad asked for a motion to approve the Agenda.

ACTION: Ms. Roberts moved and Ms. Bell seconded the motion that the Panel approve the Agenda.

Motion carried, 5 - 0.

IV. MINUTES

ACTION: Ms. Bell moved and Ms. Roberts seconded the motion that the Panel approve the Minutes from the June 24, 2016 meeting.

Motion carried, 5 - 0.

V. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director, said, welcome and good morning Panel members, applicants, and stakeholders. Following the Panel meeting in June, we have a smaller Panel meeting today with approximately $6.4M in projects with another $844,000 in Delegation Orders, for a total of just under $7.2M.

Today we have a mix of Single Employers and Multiple Employer Projects. Diana Torres, San Diego Regional Office Manager, Creighton Chan, Foster City Regional Office Manager, and Willie Atkinson, Sacramento Regional Office Manager, are here today to present the Proposals.

Regarding the Alternative Fuels and Vehicle Technology Program, we signed another $2M Interagency Agreement in partnership with the California Energy Commission going into the new Fiscal Year (FY) 2016/17. Also, the one-time $2M appropriation for drought funding has been completely expended.

In regards to Core Funds for FY 2016/17, today the Panel will consider $6.4M in projects with an additional $844,000 approved by Delegation Order. Should the Panel approve all the projects today, ETP will have approximately $74.8M for the remainder of the FY 2016/17. Again, we are in good shape going into the next FY.

Under Delegation Order, all project proposals are capped at $100,000 to be approved by the Executive Director on a continuous flow basis, and as of today, 8 projects were approved totaling over $844,000.

For FY 2016/17 funding to date, we have approximately 385 projects submitted, with a value of just over $55M. If all the projects are approved today, the Panel will have approved close to $15M in proposals. Financially we are in great shape as we move into the next FY. We are working with the Administration to look at a higher appropriation for the Budget Year 2017/18.

Regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at $36M; $35M in allocation. Multiple Employer Contract (MECs) requests are at $7.2M; $16M in allocations. Small Business has $3.7M in demand; $5.4M in allocations. Critical Proposals are at $552,000 in demand; $6.9M in allocations. Apprenticeships are at $4.8M in demand; $10.1M in allocations. Overall demand is approximately $55M.

Regarding the number of projects remaining in the Regional Offices: Single Employers 129, MECs 17, Small Business 109, Critical Proposals 2, and Apprenticeships 18 for a total of 275. AAU by category: Single Employers 53, MECs 9, Small Business 40, Critical Proposals 0, and Apprenticeships 8 for a total of 110. Staff is currently working very hard to get those projects; about 75% have been assigned to the regional office thus far.

In regards to legislation, there isn’t anything new to report to the Panel at this time.

VI. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

Mr. Knox said, as requested by a few of the Panel members, Item #1, ARS National Services Inc., and Item #8, Optima Tax Relief, LLC will be removed from the Consent Calendar. We will put them over to the next Panel meeting for discussion.

Ms. Roberts said, I would like to remove Item #1 and Item #2. There are some problems there; it's a call center and a debt collection agency. I would like them to come before the Panel.

Mr. Knox asked for a motion to adopt Consent Calendar Item #2 through #7, and Item #9 through #11.

Bluebeam, Inc.	$120,288
CHA Hollywood Medical Center, L.P. dba Hollywood Presbyterian Medical Center	$126,360
Harris & Bruno Machine Co., Inc. dba Harris & Bruno International	$108,000
Heritage Distributing Company	$187,200
LiDestri Foods, Inc.	$231,160
OpenX Technologies, Inc.	$248,000
Santa Monica Seafood Company	$173,600
SingerLewak, LLP	$122,400

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of Consent Calendar Items #2 through #7, and Items #9 through #11.
Motion carried, 6 – 0.

Mr. Broad said, I would like to note the arrival of Mr. Rodriguez (9:47am).

VII. REQUEST MOTION TO DELEGATE IN EVENT OF LOSS OF QUORUM

Mr. Knox asked for a motion for the Panel to delegate authority to the Executive Director to approve Proposals and other action items on the Agenda in consultation with the Panel Chair or Vice Chair.

ACTION: Ms. Roberts moved and there was a second on the approval to delegate authority to the Executive Director in event of loss of quorum.

Motion carried, 6 – 0.

Mr. Knox said, I would like to talk about our new online system, Employment Training Management System, ETMS. Most of you have been around long enough to know the history of this project. We are extending the launch date by another 6 to 8 weeks.

I would like to thank the Panel members and stakeholders for being patient. The new system has been in the works for about seven years in terms of the overall design. As many of you are aware, this project was initiated from the last Administration and placed under the Employment Development Department (EDD). We were added into the scope of redesign over 7 ½ years ago, in addition to the EDD CalJOBS System.

Geographic Solutions, which is the entity that holds the contract with EDD, has been working on the custom off-the-shelf build out of the ETP system. This is based on the backbone of our current operating system, and there's been a lot of negotiation for the last 3 ½ years on what we can and cannot change; we are getting close to a launch date. We had brought in some of our stakeholders and contractors to preview the new system and received some feedbacks. Our original launch date was planned for Monday, July 25th. However, after some consideration, we are working on some issues that could pose as potential problems. We will continue to move forward; we will push out the launch date by 6 to 8 weeks.

The cost of the system is very low, and that was part of the benefit in having our design going under EDD. Unfortunately, it has taken up a lot of time, but based on some feedbacks, not a lot of people are eager for the system to launch quickly.

The full system has always been under oversight by the California Department of Technology. When you're placed under review with that entity, there is a timeline that we have to meet; we have extended it out as far as we can. We will have the Panel preview the new ETP system, if not next month, the following month. We also would like to provide an in-depth training for the contractors, and I think everybody will be relatively pleased in the end.

Mr. Broad said, I have read some of the emails, and I know that some of you are not happy with the new system. You will get a chance to come up and speak before the Panel for public comments, and we can then take a look and see if we can accommodate your requests or not.

VIII. REPORT OF THE GENERAL COUNSEL

Maureen Reilly, General Counsel, said, I have no comment.

IX. REVIEW AND ACTION ON PROPOSALS

Single Employer Proposals

Physicians for Healthy Hospitals, Inc.

Diana Torres, Manager of the San Diego Regional Office, presented a Proposal for Physicians for Healthy Hospitals, Inc. (PHH) in the amount of $385,550. PHH is a for-profit coalition of local doctors whose mission is to create strong state-of-the-art hospitals that serve as centers of medical excellence in the Hemet, San Jacinto, and Menifee Valleys in Southern California. This will be PHH's third ETP Agreement in the last five years.

Miss Torres introduced Joseph Trainer, Director of Education.

Ms. Roberts asked Ms. Torres regarding the computation of substantial contribution for the active project and current proposal, and Ms. Torres addressed Ms. Roberts' questions.

Ms. Roberts said, Mr. Trainer, this has nothing to do with your training capability. Everything in this proposal looks good; we just want to be consistent from one contract to another when we look at the substantial contribution and logistics of the grants. For future contracts, keep

in mind that you might be subject to a substantial contribution. Mr. Trainer said, that sounds good to me.

ACTION: Ms. Roberts moved and Mr. Rendon seconded approval of the proposal for Physicians for Healthy Hospitals, Inc. in the amount of $385,550.

Motion carried, 6 – 0.

Reborn Cabinets

Ms. Torres presented a Proposal for Reborn Cabinets in the amount of $266,040. Founded in 1983, Reborn Cabinets, a family-owned company, designs, manufactures, and installs custom cabinetry for kitchens and baths.

Ms. Torres introduced Vince Nardo, President, and Rocio Leon, Manager and Strategic Partnership and Training, CMTC.

Mr. Rodriguez asked, did your father start the company? Mr. Nardo said, yes. Mr. Rodriquez asked, where did he learn his craftsmanship? Mr. Nardo said, he learned from one of his brothers who owned a large 200-person cabinet company in New York.

Ms. Roberts said, this is a great proposal. This is your first contract and you have a great infrastructure. You have a consultant in place to help you get through this project, and once you're familiar with the process, you can probably come back on your own.

Ms. Roberts said, using $5 per hour to meet the post-retention wage seems high for a $10 per hour position; and part of that $10 per hour is commission wage, is that correct? Mr. Nando said, we have changed the base wage for the new employee since the time we've submitted our application. The base wage was $10 per hour, but we raised it to $12 per hour. I've found two employees that are making $10 per hour, but their wage will be moved up to $12. We can't be competitive at $10 per hour, so everybody starts at $12 per hour. This is specifically for the commission sales person when they come in for training. I need to pay them a wage. Otherwise, they won't be able to live. So, we start them in the training program at $12 per hour for about 2 weeks, then they move on to commission. Ms. Roberts said, okay.

Ms. Leon said, I'm going to jump in the conversation. During the development, we were given some numbers; employer and employee portion. The dollar amount to meet the post-retention wage should be closer to $1.25 rather than $5. I apologize for that mistake. Ms. Roberts said, I'm glad we got that squared away.

Ms. Roberts asked, how many of your employees make $12 per hour? Mr. Nando said, the ones that make $12 per hour would be the line workers and manufacturers. When you start as a line worker or as a manufacturer, you only get the base wage. Most of the other positions are above $12 per hour, or $12 per hour plus a bonus. Ms. Roberts asked, after the training, would the trainees be bumped up to $13.73? Mr. Nando said, absolutely. Ms. Roberts said, okay.

Mr. Nando said, what we've seen in the newspapers, companies like Target, were raising their wages; and now we have to raise our wages. But I just can't raise an employee's wage unless they receive some type of training, because it wouldn't make sense. So, what we would like to do is put them through manufacturing and installation training.

Mr. Nando said, I would like to share two stories. The first story is about Matthew Arietta, who was a ticket taker at the movie theater. He was 21 years old and had no experience. We provided him with the training on how to reface a kitchen and bathroom, and now he's making almost $7,000 a month. The second story is about Charles Lopez. Mr. Lopez and his family thanked me at our company picnic, because prior to working for us, they were homeless. We hired him, provided him with training as a kitchen installer, and now they are able to afford a home and take a vacation. Our number one goal is to build a winning team, and I take that to heart. Our first and foremost responsibility is to give back to our people. Ms. Roberts said, those are great stories, and I appreciate you being candid. Mr. Nando said, thank you.

Ms. Bell said, thank you for being transparent. What type of benefits do you offer your employees; is there a waiting period? Mr. Nando said, the qualifying period is 60 days. We offer two different plants. The first plan is Kaiser HMO. The annual cost is $2,000 a year, and we cover about $1,700 of that amount. The employees have the option to add to their plan. The second option is Blue Cross PPO; this is for the employees who can afford a better plan. Ms. Bell said, thank you. Mr. Nando said, you're welcome.

Mr. Broad asked, are the commissioned salespeople guaranteed a minimum wage? Mr. Nando said, yes. Mr. Broad asked, how many of those 45 salespeople are new to sales? Mr. Nando said, 12 to 15; we have a high retention rate. Mr. Broad asked, are they doing cold-calls? Mr. Nando said, our salespeople are called designers. Although they are in sales, we have to train them on how to design a kitchen or bathroom; it's a design-based training. We want to hire people with no experience, because we want to be able to mold them. We set up the appointment, and the designer goes out to the customer's home. Our designer will then go over some layouts, and quote a price. We hold their hand throughout the process until the construction begins.

Mr. Broad asked, do you have a boiler room operation going? Mr. Nando said, no. Mr. Broad asked, is the commission based on the total cost of the job? Mr. Nando said, to keep it simple, our salespeople are paid on commission versus hourly, because it keeps them honest to do the job right. If they're paid hourly, it would be difficult for me to keep track if they are taking care of the customer. By holding the commission over their head, they are required to visit and take care of the customer.

Ms. Bell asked, does the sale staff receive the commission upon completion of the project? Mr. Nando said, no. They receive half of the commission when they sell the project, because we don't want them to wait; and they receive the other half once the project is completed. Mr. Broad said, thank you.

ACTION: Ms. Roberts moved and Mr. Rodriguez seconded approval of the proposal for Reborn Cabinets in the amount of $266,040.

Motion carried, 6 – 0.

Anheuser-Busch, LLC

Willie Atkinson, Manager of the Sacramento Regional Office, presented a Proposal for Anheuser-Busch, LLC (Anheuser) in the amount of $633,278. Founded in 1852, and headquartered in St. Louis, Anheuser develops, distributes and markets a variety of alcoholic beverages.

Mr. Atkinson introduced Betty Cooper, Regional Training Manager.

Ms. Roberts asked, how long have you been employed with Anheuser? Ms. Cooper said, I've been with Anheuser for 17 years. Ms. Roberts said, Anheuser had a prior contract with ETP, but you weren't involved in that project. Ms. Cooper said, that is correct. Ms. Roberts asked, are you familiar with the ETP process and data collection? Ms. Cooper said, I'm working with Tax Credit Company, and I have learned a lot about the ETP process.

Mr. Rodriguez asked, what is the role of Tax Credit Company with this project, and what services are they providing? Ms. Cooper said, they are collecting data and coaching us through the process. Mr. Atkinson said, they are a third-party consultant. They helped with the development of the proposal, and they will manage the administrative part of the project. Mr. Rodriguez asked, will they be submitting reports? Mr. Atkinson said, yes; they will.

ACTION: Ms. Roberts moved and Mr. Rendon seconded approval of the proposal for Anheuser-Busch, LLC in the amount of $633,276.

Motion carried, 6 – 0.

<u>Multiple Employer Proposals</u>

Glendale Community College Professional Development Center

Ms. Torres presented a Proposal for Glendale Community College Professional Development Center (GCC) in the amount of $925,070. This will be the 38th Agreement between ETP and GCC.

Ms. Torres introduced Kimberly Holland, Executive Director, Joel Isaguirre, Quality Assurance Manager, Roncelli Plastics, and Tony Tartaglia, Board of Trustee.

Mr. Broad said, thank you for coming, Mr. Tartaglia. It's not often that we get a visit from the Community College Board of Trustee; that's very much appreciated.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of the proposal for Glendale Community College Professional Development Center in the amount of $925,070.

Motion carried, 6 – 0.

Santa Monica Community College District

Ms. Torres presented a Proposal for Santa Monica Community College District (SMCCD) in the amount of $949,611. Founded in 1929, SMCCD is a two-year public community college located in the City of Santa Monica. This will be SMCCD's eighth ETP Agreement.

Ms. Torres introduced Sasha King, Director, and Gordon Kirkpatrick, Kirkpatrick Enterprise International (KEI).

Mr. Rodriguez asked, is the data collection system that you are using proprietary to the college, or is it something that's bought off-the-shelf? Ms. King said, no; starting with this contract, we are partnering with KEI. They will be helping us with the administrative component; up until now, it was proprietary. We have been handling all that in-house, but since we've increased our marketing effort and co-branding the training program, we are outsourcing more of those needs to KEI.

Mr. Rodriguez asked, who are you co-branding with? Ms. King said, we are co-branding with our employers. Mr. Rodriguez said, thank you.

There were no further questions from the panel.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of the proposal for Santa Monica Community College District in the amount of $949,611.

Motion carried, 6 – 0.

Northern California District Council of Laborers Construction Craft Laborers Joint Apprenticeship Training Center

Creighton Chan, Manager of the Foster City Regional Office, presented a Proposal for Northern California District Council of Laborers Construction Craft Laborers Joint Apprenticeship Training Center in the amount of $530,512. This is the third ETP Agreement between ETP and Northern California District Council of Laborers Construction Craft Laborers Joint Apprenticeship Training Center.

Mr. Chan introduced Jeff Armstrong, Director of Apprenticeship, and Jan Borunda, California Labor Federation.

There were no questions from the Panel.

ACTION: Mr. Rendon moved and Ms. Roberts seconded approval of the proposal for Northern California District Council of Laborers Construction Craft Laborers Joint Apprenticeship Training Center in the amount of $530,512.

Motion carried, 6 – 0.

Carpenters Training Committee for Northern California

Mr. Atkinson presented a Proposal for Carpenters Training Committee for Northern California (CTCNC) in the amount of $949,180. CTCNC is the educational organization that provides Pre-Apprentice, Apprentice, and Journeyman training services for union carpenters throughout Northern California.

Mr. Atkinson introduced Paula Resa, Director of Training, and Steve Duscha, Duscha Advisories.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Mr. Rendon seconded approval of the proposal for Carpenters Training Committee for Northern California in the amount of $949,180,

Motion carried, 6 – 0.

XI. PUBLIC COMMENTS

Steve Duscha, Duscha Advisories

Mr. Duscha said, Mr. Chairman, you correctly summarized my comments, and I won't expand unless prodded. I am pleased to hear that Mr. Knox will be delaying the implementation of the ETMS. That will give people like me the chance to get a better look at the system and see the "good" and the "bad", and I hope that the staff will take the time to get rid of the "bad". I'm more hopeful than I was prior to the start of this meeting, but I'm still skeptical.

Mr. Broad said, I believe that our staff has been open to suggestions. Clearly, at this point, we are not going to drop the launch of the ETMS and start all over again. We are going to continue and move forward. Our staff is open to constructive suggestion on how to make the system work more efficiently.

The transition to the new ETMS is like getting a new iPhone. It will be confusing at first, but you'll get it figured out. There's a lot of anxiety over this, because it's a new system, and it's different than what we're used too. The new system is much more automated, and it's Internet-based. Technical support will be available once the system is launched. If people have any questions, they can call our staff for assistance.

There were no further public comments.

XII. MEETING ADJOURNMENT

Mr. Broad adjourned the meeting at 10:41 a.m.

Single Employer Contractor

A single employer, ranging from a small business to a large publicly-traded corporation, may contract directly with the Panel. Usually, these are retraining projects for current employees.

- Unless funded under Special Employment Training (SET), a single employer must face out-of-state competition.
- A single employer must be subject to the Employment Training Tax.
- The employer must also make an "in kind" contribution toward the cost of training, as follows: 1) 100 or fewer employees, at least 50% of the ETP-funded amount; 2) more than 100 employees, at least 100% of the ETP-funded amount.
- The employer must provide union letters of support for employees who are represented. The employer should also be able to show how the training will enhance job security and improve opportunities for advancement.
- A single employer must establish the need for the particular training curriculum proposed.
- The employer must establish its ongoing commitment to training and represent that ETP funds will not displace existing resources.
- All single employer contracts are capped at $750,000.

These features apply to core program funding.

Multiple Employer Contractor

A Multiple Employer Contractor (MEC) may be a group of employers or a training agency, or a Workforce Investment Board.

- Up to 8% of program costs may be approved as additional funding for recruitment, placement and assessment activities. For New Hire training, the MEC may receive up to another 4% (total 12%). These costs must be justified.
- The project may be retraining or new hire training, or a combination of both. Training may take place at the worksite or a training center, or both.
- All MECs are capped at $950,000. MECs with Small Business are capped at $1.2M ($950,000 for any size employer; $250,000 for Small Business only)

Retraining

- Training hours for retrainees are capped at 200. The Panel may modify this cap for good cause on a case-by-case basis.
- The MEC must provide union letters of support for represented employees.
- The MEC must make an "in kind" contribution toward the cost of training, of at least 50% of the ETP-funded amount. These contributions may consist of:

  1) wages/benefits paid during training by participating employers;
  2) development, recruitment, placement, and assessment costs; and,
  3) facility and material expenses.

- The MEC must provide a list of participating employers to demonstrate actual employer demand for the occupational skills in the curriculum.
- The MEC must have a core group of participating employers for at least 80% of the training plan.
- Participating employers must be subject to the Employment Training Tax.
- Participating employers must demonstrate an ongoing commitment to training, and represent that ETP funds will not displace existing resources.

New Hire Training

- Training hours are capped at 260. The Panel may modify this cap for good cause on a case-by-case basis.
- The MEC must have a plan for recruiting trainees and participating employers. As part of this plan, the MEC must have an advisory board of participating employers qualified to provide guidance on needed occupational skills.
- Training must be for job-related skills that apply to specific occupations in a given industry or to specialized occupations across an industry spectrum.
- For all occupations, the MEC should be able to show a statewide or local shortage of skilled workers.

These features apply to core program funding.

Delegation Order Process

- The Panel has delegated authority to the Executive Director, without consultation with the Panel Chair, to approve (1) small business (100 or fewer employees) for $100,000 or less, and (2) single and multiple employer proposals for $100,000 or less.

- This procedure allows projects to be approved on a flow basis. This process recognizes the need for just-in-time training, and reduces or eliminates the need for a Consent Calendar.

- An ETP130 and Curriculum is prepared for each proposal. They are reviewed and approved after the Executive Director signs off. The effective date will be the date specified by the Field Analyst and if no date is specified, the earliest effective date of contract is the day after the project is approved by the Executive Director.

- A copy of approved Delegation Orders is included in each month's Panel Packet, for projects approved prior to the Panel meeting, as an information item.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

ADT LLC

Agreement Number: ET17-0179

Panel Meeting of: August 26, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Reeves

PROJECT PROFILE

Contract Attributes:	SET Retrainee HUA	Industry Sector(s):	Services Priority Industry: ☐ Yes ☒ No
Counties Served:	Alameda, Contra Costa, Fresno, Kern, Los Angeles, Orange, Riverside, Sacramento, San Diego, San Mateo, Santa Barbara, Stanislaus	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No Communications Workers of America Local 9400		

Number of Employees in:	CA: 1,200	U.S.: 14,557	Worldwide: 16,200
Turnover Rate:	15%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$169,560		$0	$0		$169,560

In-Kind Contribution:	100% of Total ETP Funding Required	$375,405

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills, Commercial Skills	417	8-200	0-50	$360	$28.37
				Weighted Avg: 24			
2	Retrainee SET HUA	Business Skills, Commercial Skills	54	8-200	0-50	$360	$16.56
				Weighted Avg: 24			

Minimum Wage by County: Job Number 1: $28.37 per hour Statewide Average Hourly Wage.
Job Number 2 (SET HUA): $15.60 per hour for Fresno, Kern, and Stanislaus counties.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $5.15 per hour may be used to meet the Post-Retention Wage for Job Number 1 only.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		21
Administrator - IT		1
Engineer - IT		1
Installer		270
Specialist – IT		1
Technician		123
Job Number 2 (HUA)		
Installer		31
Administrative Staff		6
Technician		16
Material Handler		1

INTRODUCTION

Founded in 1874, ADT LLC (ADT) (www.adt.com) is a nationwide leader in security and alarm systems. ADT serves more than six million residential and small business customers through an integrated customer service model that includes sales, installation, service, and monitoring. The Company's products and services include burglary and smoke/fire monitoring, carbon monoxide detection, video surveillance, and medical alert systems. This will be ADT's second ETP Agreement; however, it is the first within the past five years.

ADT is headquartered in Boca Raton, Florida and has more than 200 branch locations across the United States and Canada. For this proposal, the Company plans to train employees at multiple California locations including Anaheim, Bakersfield, Brisbane, Chatsworth, Concord, Fremont, Fresno, Goleta, Modesto, Riverside, Sacramento, San Diego, and Torrance.

PROJECT DETAILS

The capabilities of security systems are constantly changing due to technological advancements and the need to stay ahead of criminals determined to circumvent industry innovations.

In 2010, the Company introduced ADT Pulse, which allows customers to remotely monitor and manage their home and business environments by adding automation capabilities to their monitored security systems. In 2014, ADT introduced the industry's first voice authentication and control application for ADT Pulse. The Company expanded the capabilities of Pulse even further in 2015 by integrating new Internet of Things (IoT) services. Pulse automation combined with IoT technology enables customers to remotely arm/disarm their system, as well as adjust lighting and temperature controls to conserve energy.

Training Plan

Training will take place onsite as delivered by in-house subject matter experts and outside vendors to be identified during the contract term. The majority of training will be Class/Lab, but there will also be some Computer-Based Training (CBT). CBT training will consist of product-related modules to reinforce Class/Lab training.

Business Skills (45%) – Training will be offered to all occupations. Training will focus on communication skills, product knowledge, and sales techniques. This training will ensure that employees at all locations develop the skills to manage assignments efficiently and deliver knowledgeable product presentations and service recommendations.

Commercial Skills (55%) – Training will be offered to Installers, Technicians, and Material Handlers. Workers will receive training on company-specific products and features related to system installation, access control, networking, and troubleshooting.

SET/HUA

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify for SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.

The 54 trainees in Job Number 2 work in Fresno, Kern and Stanislaus Counties, High Unemployment Areas (HUA) with unemployment exceeding the state average by at least 25%. These trainees qualify for the ETP minimum wage, rather than the statewide average hourly wage. The Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. However, ADT is not requesting a wage modification.

Electronic Recordkeeping

ETP staff has approved the use of a Learning Management System for recordkeeping.

Union Support Letter

The Communications Workers of America Local 9400 has provided a letter of support for the training of its union members at all participating facilities.

Commitment to Training

ETP funds will not displace the Company's existing financial commitment to training. ADT spends approximately $600,000 annually on training for various California facilities. Ongoing company-funded training consists of new-hire orientation, anti-harassment, ethics, and basic computer skills. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  ADT has lead personnel in place to centralize and manage the scheduling, tracking, and reporting of all ETP-funded training. The Company has also retained an outside administrative consultant to ensure that training administration meets ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

ADP in San Dimas assisted with development for a flat fee of $10,000.

ADMINISTRATIVE SERVICES

ADP will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS
- Residential High Volume Selling
- Residential High Volume Product
- Residential High Volume Prospecting
- Residential Resale Selling
- Residential Resale Product
- Residential Resale Prospecting
- Custom Home Services Prospecting
- Dealer Operations Product Training
- Dealer Operations Prospecting Training
- Business Writing
- Setting Priorities
- Financial Acumen – How ADT Makes Money
- Communicating Effectively
- Engage & Motivate
- Behavior Based Coaching
- Having Difficult Conversations
- QuickStart – Selling to the ADT Custom Home Market

COMMERCIAL SKILLS
- Field Technician Pulse Training
- Field Technician Panel Training
- Field Technician Video Training
- Field Technician Access Control Training
- Field Technician Troubleshooting Training

CBT Hours
0 - 50

BUSINESS SKILLS
- 50&4 Fundamentals Program (0.5 hour)
- AARP ADT Business Sales Rep Certification (1 hour)
- Building Customer Relationships – Sales (1 hour)
- Completing the Residential Services Contract for Sales (1 hour)

COMMERCIAL SKILLS
- 4000B Control Panel Training 2016 (8 hours)
- Access Control Advanced Module Four: Final Skill Check (0.5 hour)
- Access Control Advanced Module Four: Power and Transmission (0.5 hour)
- Safety Code, Locking and Door Hardware (1 hour)
- Access Control Basics for ADT Non Technicians (2 hours)
- Activate Existing Systems (1 hour)
- ADT Brivo Certification (1 hour)
- ADT Brivo Refresher Course (1 hour)

- ADT Certified Trainer (1 hour)
- ADT Nest Thermostats Installation (1 hour)
- ADT Nest Thermostats Overview (1 hour)
- ADT Pulse Select (1 hour)
- ADT Pulse Training 2016 (16 hours)
- ADT Total Security for Small Business (1 hour)
- Basic Electricity and Troubleshooting (1 hour)
- Basic Networking for Technicians (1 hour)
- Hazardous Materials Training (0.5 hour)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours per trainee.

Communications Workers of America Local 9400

AFL-CIO, CLC

7844 Rosecrans Avenue, Paramount CA 90723-2296 562.259.9400 562.633.0536 Fax CWA9400@pacbell.net

William L. Demers
President

June 16, 2016

Application Review Unit
Employment Training Panel
1100 J Street, 4th Floor
Sacramento, CA 95814

Re: Training

To Whom It May Concern:

On behalf of the employees of ADT Security Services represented by Communications Workers of America Local 9400, I am writing this letter in support of additional training through the ETP program.

We recognize the importance of training and the impact that will have to improve the skills of our workers.

Respectfully,

W Demers

William Demers
President
CWA Local 9400

RETRAINEE - JOB CREATION

Training Proposal for:

ENGEO Incorporated

Agreement Number: ET17-0198

Panel Meeting of: August 26, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** A. Nastari

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Priority Rate Retrainee Veterans HUA	Industry Sector(s):	Engineering Construction Technology/Other Priority Industry: ☒ Yes ☐ No
Counties Served:	Statewise	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No Operating Engineers Local Union No. 3, Sacramento		

Number of Employees in:	CA: 150	U.S.: 150	Worldwide: 215
Turnover Rate:	15%		
Managers/Supervisors: (% of total trainees)	11%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$168,304		$0	$0		$168,304

In-Kind Contribution:	100% of Total ETP Funding Required	$297,070

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Advanced Technology Skills, Business Skills, Commercial Skills, PL-Commercial Skills, Hazwoper	150	8 - 200	0 - 24	$432	$18.00
				Weighted Avg: 24			
2	Retrainee Job Creation Priority Rate	Advanced Technology Skills, Business Skills, Commercial Skills, PL-Commercial Skills, Hazwoper	34	8 - 200	0 - 24	$2,240	$18.00
				Weighted Avg: 112			
3	Retrainee Priority Rate Veterans	Advanced Technology Skills, Business Skills, Commercial Skills, PL-Commercial Skills, Hazwoper	5	8 - 200	0 - 24	$2,288	$18.00
				Weighted Avg: 104			
4	Retrainee Job Creation Priority Rate Veterans	Advanced Technology Skills, Business Skills, Commercial Skills, PL-Commercial Skills, Hazwoper	3	8 - 200	0 - 24	$2,288	$18.00
				Weighted Avg: 104			

Minimum Wage by County: $17.02 for Alameda, Contra Costa, San Francisco, and Santa Clara counties; $16.48 for Los Angeles County; $16.51 for Orange County, and $15.60 for San Joaquin and Placer counties

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe

Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 Engineers & Geologists Level 1		50

Engineers & Geologists Level 2		3
Field Representatives Level 1		69
Field Representatives Level 2		2
Lab Representative		10
Managers		16

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job 2 – Retrainee - Job Creation: Engineers & Geologists Level 1		6
Engineers & Geologists Level 2		6
Field Representatives Level 1		22
Job 3 – Retrainee - Veterans		
Field Representatives Level 1		5
Job 4 – Retrainee – Job Creation - Veterans		
Field Representatives Level 1		3

INTRODUCTION

Founded in 1971, ENGEO Incorporated (ENGEO) www.ENGEO.com, provides specialized engineering services required for the design and construction of buildings, reservoirs, pipelines and commercial sites, such as sports arenas, medical facilities, and rail lines. ENGEO competes with international, national and local firms. ENGEO's clients include city, county, state and local agencies and utility districts throughout California, public and private land developers, builders, financial institutions and land owners.

ENGEO meets out-of-state competition standards as a company providing engineering services. As an engineering services provider, ENGEO is also eligible for priority industry reimbursement.

ENGEO has nine California locations: Antioch, Irvine, Lathrop (HUA), Oakland, Rocklin, San Francisco, San Jose, San Ramon (headquarters) and Santa Clarita. The Company's Engineers, Geologists and Field Representatives provide the following services: analysis of soil and rock for construction design, consultation and design to address environmental clean-up of contaminated groundwater and soil; grading of the land; soil testing; storm water management, including creation and implementation of Storm water Pollution Prevention Plans and Storm water Management Plans and permitting support.

This is ENGEO's third ETP Proposal. Since its last Agreement, ENGEO increased its workforce by 20 employees (15%), expanded its business services, and added two facilities, Antioch and Oakland, as a result of significant increase in construction related activities. ENGEO is

geographically expanding its business to include other areas throughout California. Its Irvine facility has seen a business growth of 100% over the past two years. To meet business demands, the Company's goal is to hire 34 workers (Job Creation).

In previous ETP Agreements, ETP funds assisted the Company in developing the skills of its existing and newly-hired Engineers, Geologists, and Field Representatives. Training consisted of courses in regulatory changes regarding water quality, air quality, and permitting for geotechnical and environmental exploration. Workers were also trained in the utilization of highly technical equipment such as x-ray florescence equipment, vapor operated equipment, and meters to measure the pH of soil and water. Trainees learned how to use nuclear density gauges to measure and assess moisture and density of the soil or water being tested and report on their findings.

Today, ENGEO's Field Representatives, Engineers, and Geologists must possess knowledge in California's regulatory changes pertaining to seismic building codes, storm water management, and environmental assessment standards in order to clearly inform clients of its effects on the projects. Regulatory changes impact ENGEO's processes from project analysis, testing, inspection, costing, to field design implementation. During the proposed training plan, ENGEO will train on updated regulatory changes that impact construction improvement projects. These are updated every 2-4 years.

Due to the complexity of the subject matter, ENGEO will send its trainers to workshops delivered by the regulatory authors who discuss the changes and interpretations. ENGEO's trainers will train staff on the changes.

Additionally, ENGEO must continue to train Field Representatives, Engineers, and Geologists in the use of technical x-ray florescence equipment, vapor operated equipment, and meters used to measure the pH of soil and water. Trainees must learn how to accurately conduct tests by measuring and assessing moisture and density of the soil or water through the use of nuclear density gauges. They must then provide an accurate report on their findings.

Union Support

ENGEO's Field Representatives are represented by Operating Engineers Local Union No. 3, from Sacramento. The union provided a letter supporting its training initiatives. It specifically supports site specific training or training conducted at a client's job site.

Retrainee - Job Creation

In support of job creation, the Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

ENGEO has committed to hiring 34 new employees (Job Number 2). It also plans to hire three Veterans (Job Number 4). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract. ENGEO facilities are equipped to accommodate the anticipated new hires.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Higher support costs are also available to reach participants for this program. ENGEO currently has five incumbent workers in Job Number 3 who are Veterans and

who will participate in the Company's training plan. Additionally, it plans to hire three new Veterans in Job Number 4 during the term of the Agreement.

High Unemployment Area

Twenty five trainees (Job Number 1) work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's location in San Joaquin County qualifies for HUA status under these standards.

- Wage Modification

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. However, ENGEO is not asking for a wage modification.

Temporary to Permanent Hiring

ENGEO intends to train 3-5 workers in Job Number 2 under Panel guidelines for the Temporary to Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. The average time for "converting" temporary workers into full-time permanent employment is six months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled as trainees until after they have been hired by ENGEO into full-time, permanent employment. Until they are so hired, retention and post-retention wage requirements cannot be satisfied and the Company will not receive progress payments.

PROJECT DETAILS

Training Plan

The courses in this Proposal build upon the skills delivered to incumbent and newly-hired workers in its previous ETP funded training Agreement. The majority of the courses have been designed by ENGEO's expert Engineers and Geologists. The courses consist of several levels and topics within a Master Series. Each trainee is required to complete Level 1 before participating in the next level of training in the specific topic. Each topic level is built upon the previous level and topic levels are added, as necessary, when code or industry practice changes occur.

Additionally, ENGEO has developed and added several new courses and series, such as Technical Acumen Series, Concrete and Post-Tension skills, advanced Soil and Materials Testing, which comprises of various materials from California regions.

Participating Engineers and Geologists must be employed with ENGEO for at least two years in order to obtain the foundation and experience in the Company's service offerings. Field Representatives are entry-level and intermediate positions. It's the Company's goals to provide workers the necessary skills and tools to develop a flexible team allowing for advancement opportunities in high-skilled, high-paying jobs.

Advanced Technology (35%): This training will be offered to all occupations in the areas of Commercial Skills in testing techniques, processes, analysis, storm water management, environmental site assessments and construction foundations.

Business Skills (15%): All occupations will receive some or all training in project management, managing projects in construction services, and technical acumen series.

Commercial Skills (15%): All occupations will receive training as pertinent to their job functions in the operation of storm water pollution prevention and management plans, concrete, field grading, and nuclear gauges, which is equipment used to measure and assess the moisture and density of soil or water.

HAZWOPER (5%): The Company plans to deliver this training via CBT. Training will be provided to all occupations as specific to their job functions.

Advanced Technology

Training in AT will be provided to Engineers, Geologists and Field Representatives. Newly-hired Engineers and Geologist will receive training in utilizing highly technical sampling equipment used in soil and groundwater collection. The samples will be tested at ENGEO's laboratories which will be used in high-level engineering analysis for planned construction improvements.

These occupations require specialized skills and training to maintain high-level quality controls and quality assurance practices required to meet EPA and environmental standards and requirements prior to construction.

Training in the accurate use of the equipment and testing procedures is paramount because an improper technique or analysis could result in structural damage to a construction site. The cost to deliver this training may be as high as $65 per hour per trainee.

The trainer-to-trainee ratio is 1:10 for AT, to allow in-depth coverage and personal attention from the instructor.

Productive Laboratory (30%)

Trainees may produce goods for profit as part of PL training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

Commercial skills are required by Engineers, Geologists, and Field Representatives and are very specialized and technical in nature. Training must be performed on the job site or at ENGEO's laboratories, where trainees apply hands-on procedures. During PL, trainees will use Nuclear Gauges, Field Stake Readings and equipment required for grading construction. Trainees will gather soil and water samples from the construction sites and learn to perform lab testing and analysis conducted at ENGEO's laboratories. Trainees will write reports based on their findings. The test results are used by Engineers to develop recommendations necessary to support land development.

A high level of proficiency can only be attained using actual materials at the job site. Therefore, ENGEO projects 75 trainees across all occupations will receive up to 60 hours of PL. Training will be delivered under the direction and guidance of ENGEO's Senior Engineers. The trainers' will provide specific tasks and conduct side-by-side testing and analysis. Training will be provided primarily at a 1:1 trainer-to-trainee ratio; and up to 1:2 ratio in a few situations.

Productive Lab training will be delivered to Field Representatives, both incumbent and newly hired, as well as new Engineers/Geologists, at the client's job site.

Certified Safety Training

Hazardous Waste Operations and Emergency Response Standard (HAZWOPER). This training is a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 8 - 24 hours of classroom or CBT training, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Training Location

ENGEO estimates that 90% of the class/lab curriculum will be provided at ENGEO's facilities. The remaining 10% will be provided on construction sites, higher learning institutions, seminar locations and/or college campuses, to be determined as needed.

Commitment to Training

The training ENGEO proposes complements its programs already in place which proactively respond to industry demands that are in a state of constant and rapid change.

ENGEO's annual training budget of $950,000 provides training to workers throughout its facilities. Training includes new employee orientation and on-boarding, human resources related skills, company required safety training, management training in hiring, interviewing and employee relations. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

As with ENGEO's previous Agreements, the Company has its dedicated administrative staff in place to enroll trainees, obtain rosters and enter the data into ETP's online system. It has identified its internal trainers so that training will begin immediately following project approval by the Panel.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by ENGEO Incorporated under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET15-0191	Statewide	7/7/2014 – 7/6/2016	$102,400	$93,624 (91%)*
ET12-0398	San Ramon	5/11/2012 – 5/10/2014	$49,920	$49,920 (100%)

*ET15-0191 ENGEO is in the process of closing out this Agreement. The ETP online Tracking system shows enough hours to earn $93,624. Trainees have completed their 90-day retentions. Therefore, ENGEO expects to earn 91% of the approved amount of $102,400.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Master Series
- Project Management
- New Staff Engineer/Geologist Training
- Technical Acumen Series
- Construction Services Management Series
- Software/Application Marketing Training

COMMERCIAL SKILLS

- Nuclear Gauge Operator Training
- Qualified SWPPP Developer (QSD)
- Qualified SWPPP Practitioner (QSP)
- Field Representative Performance Training
- Field Representative Winter Field Training
- Field Representative Winter Office Internship
- ICC Reinforced Concrete Preparation Series
- ICC Post-Tension Preparation Series
- ACI Concrete Field Grade I Training

AT Hours
0 – 60

ADVANCED TECHNOLOGY (ratio 1:10)

Geotechnical Engineers/Geologists:

- Soil Index/Strength Testing- Triaxial, Shear, Consolidation, Atterberg
- Construction Observation for Engineering/Geologists
- Foundation Construction Observation Introduction
- Geotechnical Exploration for Schools/Hospitals – CGS Note 48
- Grading Plan Review and Corrective Grading Plan Preparation
- Analysis Topic – Liquefaction/Lateral Spreading Analysis
- Analysis Topic – Compressible Soils/Bay Mud Analysis
- Analysis Topic – Developing Foundation Design Criteria
- Analysis Topic – Ground Improvement Techniques
- Analysis Topic – Stabilized Earth Retaining Wall Design
- Analysis Topic – Structural Retaining Wall Design
- Analysis Topic – Soil Structure Interaction Analysis

Environmental Engineers/Geologists**:**

- Phase II Environmental Site Assessment Scoping/Field Work
- Phase III Environmental Site Assessment Scoping/Field Work
- Analysis Topic – Environmental Risk Assessment
- Analysis Topic – Environmental Sustainability
- Analysis Topic – Green and Sustainable Remediation Practices

Water Resource Engineers/Geologists

- Stormwater Management Plan Analysis/C3 BMP Analysis
- Stormwater Pollution Prevention Plan/Erosion Control Plan
- Hydraulics/Hydrology – Creek Mitigation & Restoration Analysis
- Analysis Topic – Advanced Modeling Analysis
- Analysis Topic – Advanced AutoCAD for hydraulics
- Analysis Topic – Stormwater Design Guideline Development

Field Representatives:

- Advanced Remedial/Corrective Grading Techniques and Methods
- Geotechnical Product Installation and Observations - subdrainage, geotextiles, geogrid reinforcement
- Foundation Construction Observations – structural mat, piers, footings, piles, soil nail walls
- Advanced Soil Testing (Cyclic Direct Simple Shear, Constant Rate Strain Consolidation)
- Advanced Materials Testing (Cell-crete specimen preparation and testing, Lime/Cement Treated soil bench scale and production testing)

Safety Training is capped at 10% of a trainee's total training hours

PL Hours
0 – 60

PRODUCTIVE LAB (PL)-COMMERCIAL (limited ratio 1:2)

New Hire Engineers/Geologists**:**

- Laboratory Testing Introduction (Interpret, Assign Values for Analysis)
- Site USA and Field Exploration Types (Mud, Auger, Pitcher, Shelby)
- Environmental Site Reconnaissance (Greenfield, Brownfield, Commercial/Industrial)

Field Representatives:

- Nuclear Gauge – Usage, Testing/Corrections, Data to document
- Concrete/Grout Placement – Observations, Sampling, Data to document
- Adhesive Anchor Installations- Observations, Data to document
- Safety –Driving, Parking, Testing (grading, improvements, concrete)
- Field Test Locating and Stake Reading – Plans and Technology
- Moisture Only (Drybacks) and Fill Specification Selection
- Construction Observation Activities – Grading, Utilities, Streets, Walls
- Hot Mix Asphalt Placement – equipment/materials, temperatures, Data
- Foundation Construction - Pad Moisture Observations
- Construction Site BMP Monitoring and Sampling
- Lab Training (Construction Testing) – Curves, PI, Gradations, Sieves
- Soil Index Testing (Compaction Curve, Sieves, Atterberg, Sulfate, Durability)
- Soil Strength Testing (Unconfined, Triaxial UU, Direct Shear, R-Value)
- Cementitious Materials Testing (Mortar, Grout, Concrete)
- Materials Specification Testing (Hot Mix Asphalt and Aggregate Base)
- Laboratory Representative Certification Training (Caltrans)

CBT Hours
0 – 24

COMPUTER BASED TRAINING (CBT)

- OSHA Hazwoper (24-hour)
- OSHA Hazwoper (8-hour Refresher)

.

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee excluding OSHA 10 and OSHA 30. PL is capped at 60 hours per-trainee.

Operating Engineers Local Union No. 3

3920 LENNANE DRIVE, SACRAMENTO, CA 95834 • (916) 993-2055 • FAX (916) 419-3491

Jurisdiction: Northern California, Northern Nevada, Utah, Hawaii, and the Mid-Pacific Islands

August 9, 2016

Ms. Valerie Davis
ENGEO, Incorporated
2010 Crow Canyon Place, Suite 250
San Ramon, CA 94583-4634

Re: California ETP Letter of Concurrence

Ms Davis,

The Operating Engineers Local Union No. 3 is in receipt of your request for concurrence that employees covered by the collective bargaining agreement between ENGEO and the Operating Engineers Local Union No. 3, AFL-CIO participate in training funded by the State of California's Employment Training Panel (ETP).

The Operating Engineers prides itself on offering the finest training available to the Technical Engineering Industry but always encourage our employer-partners to offer as an option employer, or site specific training it deems beneficial. Please accept this letter as our concurrence for any and all additional training ENGEO believes beneficial to members of the ENGEO / Operating Engineers family.

Respectfully.

M. Strk

Michael Strunk
Sr. Tech. Engineers Rep.
IUOE Local Union No. 3

RETRAINEE - JOB CREATION

Training Proposal for:

Erickson Framing CA LLC

Agreement Number: ET17-0194

Panel Meeting of: August 26, 2016

ETP Regional Office: Sacramento **Analyst:** K. Smiley

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate Veterans	Industry Sector(s):	Construction Priority Industry: ☒ Yes ☐ No
Counties Served:	Placer	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 280	U.S.:777	Worldwide: 777
Turnover Rate:	14%		
Managers/Supervisors: (% of total trainees)	11%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$173,832		$0	$0		$173,832

In-Kind Contribution:	100% of Total ETP Funding Required	$186,400

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Literacy Skills, Continuous Impr, OSHA 10/30, Advanced Tech, PL-Comm Skills	108	8-200	0	$1,314	*$15.60
				Weighted Avg: 73			
2	Retrainee Job Creation Priority Rate	Business Skills, Commercial Skills, Computer Skills, Literacy Skills, Continuous Impr, OSHA 10/30, Advanced Tech, PL-Comm Skills	20	8-200	0	$1,200	*$12.77
				Weighted Avg: 60			
3	Retrainee Priority Rate Veterans	Business Skills, Commercial Skills, Computer Skills, Literacy Skills, Continuous Impr, OSHA 10/30, Advanced Tech, PL-Comm Skills	5	8-200	0	$1,584	*$15.60
				Weighted Avg: 72			

*It will be made a condition of contract that trainees will never be paid less than the State or local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Numbers 1 & 3: $15.60 per hour for Placer County; Job Number 2: $12.77 per hour for Placer County.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Trainees in Job Numbers 1 & 3 may use up to $1.19 per hour to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Carpenters		55
Managers		15
Foremen		35
Administrative Staff		3
Job Number 2		
Carpenters		20

Job Number 3		
Carpenters		3
Managers		1
Foremen		1

INTRODUCTION

Founded in 1975, Erickson Framing CA LLC (Erickson), a subsidiary of Atlas Holdings, LLC, provides construction services to single-family local and regional homebuilders and large-scale residential and multi-family builders. Erickson offers complete panelized framing solutions and pre-fabricated building components throughout the western United States. Erickson helps home builders reduce construction time and carrying costs by manufacturing complete framing systems that they ship and install at the job site.

PROJECT DETAILS

Erickson is expanding, estimating 50% growth in the next year. The Company will be adding a third production shift with all new employees. However, the Company has had difficulty finding experienced workers. The downturn in the economy reduced available skilled workers and has forced the Company to recruit and develop new employees. The Company created a detailed training plan that will give beginner-level trainees the skill sets they need to be successful. Training will focus on framing procedures, installation procedures and Truss fabrication to ensure quality and uniformity between work sites. Additionally, the training plan will increase skills of experienced employees. These trainees will receive advanced courses to add to their skill sets.

Erickson is also committed to creating a positive working environment to encourage retention and promotion. Training in soft skills, that includes leadership, communication and decision making, will give trainees transferable skills while promoting the Company's culture.

Retrainee - Job Creation

In support of job creation, the Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

Erickson is increasing existing business capacity by adding a permanent third production shift. The Company is committed to hiring 20 new employees (Job Number 2) to support expansion. This new shift will allow the Company to manage the increasing demand. These trainees must be hired within the three-month period prior to Panel approval or during the term of the Contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Business Skills (24%): Training will be provided to all staff to improve customer satisfaction and consistency. Courses will include Project Management, Internal Systems Processes and Customer Service. Training will increase trainee skill sets for promotional opportunities within.

Literacy Skills (2%): Training will be provided to individuals from all occupations. These individuals need this training to satisfactorily perform their work duties. Training will include English as Second Language (ESL), Vocational ESL, reading, and writing.

Commercial Skills (32%): Training will be offered to Carpenters, Foremen, and Managers to increase construction knowledge and consistency. Topics will include Framing Procedures, Installation Procedures and Truss Fabrication.

Computer Skills (4%): Training will be provided to Administrative Staff, Foremen, and Managers on QuickBooks and MS Office Suite to increase efficiency in producing and tracking inventory.

Continuous Improvement (31%): Training will be provided to all occupations to enhance company culture and internal processes. Courses will include Quality Control, Team Building, and Scheduling.

Certified Safety Training (7%)

OSHA 10/30: This training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work and manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. OSHA 10/30 will be offered to all occupations.

Advanced Technology

Seven Managers (Job Number 1&3) will receive up to 20 hours of Computer-Assisted Drafting (CAD) technology training to update skills. These trainees are responsible for the engineering of framing architecture. The trainer-to-trainee ratio will not exceed 1:7 to allow in-depth coverage and personal attention from the instructor. All trainees have CAD experience and training will increase their level of proficiency. Due to the complicated nature of the course curriculum, the use of high-end equipment and software, and the high cost of experienced trainers, AT will be reimbursed at a higher rate ($26 per hour for priority industries).

Productive Laboratory

Productive Lab (PL) in Commercial Skills will be offered to 78 Carpenters on Framing, Installation Procedures and Truss fabrication. This training will be provided at a much slower pace than regular field construction. The product will have significantly higher defects as trainees learn and gain proficiency. Training will be conducted by a subject-matter expert at the Roseville facility and at job sites. The trainer will attest to the trainee's competency once training is completed.

Trainees will be under constant supervision and trainers will only be dedicated to training. L&S is requesting a 1:5 trainer-to-trainee ratio to simulate work conditions since employees will be working in small groups on the job. The pre-fabricated trusses are so large that 4-6 carpenters are required in order to safely lift, place and install them at the work site. PL training will be capped at 34 hours per trainee.

Commitment to Training

Erickson has an annual training budget of $300,000 per year. Training includes new hire orientation, staff development, job specific training and safety training.

ETP funds will not displace the Company's existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  Erickson has a detailed training plan in place with one staff member dedicated to monitoring this project and five trainers who will coordinate training and collect rosters. In addition, Erickson has contracted with Propel Consulting Group to help with administration. Erickson will use a combination of internal and external trainers who are subject-matter experts in the construction industry.

Veterans Program

Erickson actively recruits and has a hiring preference for Veterans. Veteran trainees are represented in Job Number 3.

DEVELOPMENT SERVICES

Erickson retained Propel Consulting Group of El Dorado Hills to assist with development of this proposal for a fee of $7,153.

ADMINISTRATIVE SERVICES

Erickson also retained Propel Consulting Group to perform administrative services in connection with this proposal for a fee not to exceed 11% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS
- Accounts Receivable
- Accounts Payable
- Accounting Processes
- Teambuilding
- Internal Systems Processes
- Customer Service
- Communication Skills
- Project Management

COMPUTER SKILLS
- Internal Use Industry Software
- MS Office Suite
- QuickBooks
- CAD

CONTINUOUS IMPROVEMENT
- Quality Control
- Team Building
- Scheduling
- Problem Solving & Decision Making
- Process Improvement Procedures
- Process Workflow Procedures
- Leadership
- Budgeting
- Decision Making

COMMERCIAL SKILLS
- Framing Procedures
- Installation Procedures
- Tool Operation
- Forklift Operation
- Product Identification
- Site Set-Up/Clean-Up
- Truss Fabrication
- Material Safety Data Sheet (MSDS)
- Globally Harmonized System (GHS)

OSHA 10/30 (OSHA Certified Instructor)
- OSHA 10 (Must complete full 10-hour course)
- OSHA 30 (Must complete full 30-hour course)

LITERACY SKILLS
- Written
- Verbal

ADVANCED TECHNOLOGY (Trainer-to-trainee ratio 1:7)

- Computer-Assisted Drafting

Productive Lab Hours

0-34

COMMERCIAL SKILLS (Trainer-to-trainee ratio 1:5)

- Framing Procedures
- Installation Procedures
- Tool Operation
- Forklift Operation
- Product Identification
- Site Set-Up/Clean-Up
- Truss Fabrication
- Floor & Roof Systems
- Wall & Home Layout
- Material Selection & Usage

Literacy Training cannot exceed 45% of total training hours per-trainee
Safety Training will be limited to 10% of total training hours per-trainee

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 34 hours per-trainee. AT is capped at 20 hour per-trainee.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

National Veterans Transition Services, Inc.

Agreement Number: ET17-0178

Panel Meeting of: August 26, 2016

ETP Regional Office: San Diego **Analyst:** H. Bernard

PROJECT PROFILE

Contract Attributes:	New Hire Veterans	Industry Sector(s):	Technology/IT Services Communication Priority Industry: ☒ Yes ☐ No
Counties Served:	San Diego	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		
Turnover Rate:		N/A	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$141,900		$22,704 20%		$164,604

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	New Hire Veterans	Business Skills, Computer Skills, Continuous Impr	43	8-200	0	$3,828	$12.77
				Weighted Avg: 150			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: $12.77 in San Bernardino and Ventura Counties; $13.72 for San Diego County; $13.73 for Los Angeles County; and $13.76 for Orange County

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Participating employers may use health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		5
IT Staff		5
Manager/Supervisor		5
Technical Support Staff		28

INTRODUCTION

Founded in 2010, National Veterans Transition Service, Inc. (NVTSI) (http://www.nvtsi.org/) is a San Diego based non-profit organization dedicated to assisting veterans in adjusting to civilian life and securing meaningful employment. NVTSI's mission is to assist veterans in many facets of life including: employment and career; education; living situation; personal effectiveness/well-being; and community-life functioning. NVTSI is eligible for ETP funding as a Workforce Investment Act Funding recipient. This proposal will be an ETP Veterans initiative project.

To accomplish its mission NVTSI developed a comprehensive military-to-civilian transition program, REBOOT, designed to address the personal and social aspects of transition, targeted at increasing the self-esteem and self-efficacy of veterans. Taking a holistic approach, REBOOT builds upon a service member's military training and skills to help participants redefine their personal identity, purpose in life, and desired occupation. This program is designed to help bridge the gap between military and civilian worlds. NVTSI serves both active duty individuals as well as veterans.

NVTSI's services are funded through a variety of sources including individual donors. However it primarily relies on funding from foundations such as the Bank of America Charitable Foundation, Wells Fargo Charitable Foundation and the San Diego Foundation. Additionally, the organization has recently implemented a social enterprise model in which it recruits

businesses who pay membership fees and in return are provided workforce development services by NVTSI. The organization currently has 25 member employers but is looking to expand this model in the next 5 years to reach over 1000 businesses.

Employer Demand

NVTSI's employer membership annual fees are in exchange for workforce development services and veteran job candidate referrals. These member employers offer feedback on training curriculum and employees trained by NVTSI. This feedback is given via employer surveys and meetings held with NVTSI staff. Additionally NVTSI has an advisory board which consists of elected officials, workforce development professionals, military personnel and employers. NVTSI also works closely with up to 600 non-member employers across Southern California each year. NVTSI representatives meet with these employers to identify hiring goals and determine how hiring veterans will assist the companies.

Utilizing data from Indeed.com and Labor Market Information Data provided by EDD, NVTSI identified a significant need for project management skills, projecting 3,800 project management positions opening in San Diego in the next few years. Additionally, information from NVTSI's aforementioned survey of local employers cited a need for skills consisting of project management, computer, problem solving, communication, collaboration (with information technology teams), negotiation, project management software, action-planning, time management and waste reduction.

PROJECT DETAILS

The ETP project will fund veteran trainees who have been discharged from military service. Active duty military personnel will be funded by NVTSI's other funding sources. NVTSI has committed to train 43 unemployed veterans who have been discharged from military service. NVTSI plans to place these trainees in employment as Administrative Staff, IT Staff, Managers/Supervisors and Technical Support Staff across Southern California. All training will occur at NVTSI's San Diego location.

Curriculum Development

NVTSI's curriculum was created to include basic skills found in the REBOOT program and vocational skills (Project Management and Computer Skills) found in the REBOOT Plus program. The REBOOT Plus portion of the curriculum was developed by New Horizons Learning Group. New Horizons will provide training on Project Management Fundamentals, MS Office and Windows 10. [New Horizons regularly surveys California manufacturers and service companies to identify training needs. For the computer industry, training is constantly updated to keep up with technological advances.]

Training Plan

Newly Hired Veteran trainees will receive up to 150 hours of a combination of basic skills (70 hours but not to exceed 50% of total training hours per trainee) and vocational skills (80 hours). Trainees will attend training daily, 40 hours per week for 5 weeks. All training will be provided at NVTSI's San Diego location.

Business Skills (60%) – Training will be offered to all trainees in job preparation skills to teach trainees business fundamentals. These skills will focus on communication skills, action planning, goal setting and leadership skills in order to prepare trainees leaving the armed forces to work in a new business environment. Additionally, trainees will learn project management skills and time management.

Computer Skills (20%) – Training will be offered to all trainees in vocational computer skills. Computer skills will be offered by both NVTSI and New Horizons Training Group. Classes offered by NVTSI will include Hardware and Security, Outlook and Internal Customer Applications. Classes provided by New Horizons will include Microsoft Office and Project Management Fundamentals and Essentials.

Continuous Improvement (20%) – Training will be offered to all trainees focusing on decision making, conflict resolution and problem solving. NVTSI will work with trainees to enhance communications and interpersonal communications, build teamwork and reduce conflict. Trainees will be taught how to identify and utilize problem solving techniques to make decisions and implement solutions that will help them reduce and eliminate inefficiencies in the workplace.

Recruitment/Support Costs

NVTSI uses its resources to work with partner agencies across San Diego County to recruit recently separated veterans to the program. Partnerships include the San Diego Veterans Coalition, San Diego Career Centers, and California Department of Veterans Affairs. Additionally NVTSI works with military branches in San Diego and receives referrals of service members who will be leaving active service within 90 days. NVTSI states that there is a wait list of up to 550 transitioning service members who are waiting to get into the REBOOT program and has found an overabundance of veterans in need of its services.

NVTSI requests support costs of 20% for Veterans in Job Number 1 for trainee outreach and recruitment, job placement and employer outreach and recruitment to ensure trainees are placed with viable, ETP-eligible employers. Staff recommends approval of the support costs.

Placement and Retention

Part of the REBOOT program (not funded by ETP) focuses on resume writing and mock interviewing to help prepare trainees for the civilian workforce. It also offers courses that assist trainees in learning their personality traits and communication styles so they utilize that information to be successful in the workplace. NVTSI has a job board for participants and has built relationships with many employers in Southern California who are interested in hiring veterans.

The organization also works with agencies and employers across San Diego County as well as its member employers and has built relationships with those entities to assist trainees in finding employment. NVTSI has two dedicated staff focused on relationships with employers and partner agencies to ensure trainee success and employment. NVTSI has a track record of successfully placing veterans in jobs: In 2014, of 140 trainees who attended the REBOOT, 127 were placed into jobs (90%) and in 2015 of the 160 trainees in the program, 141 were placed into employment (88%).

Trainer Qualifications

All NVTSI instructors are Veterans with a minimum of four years of instructional experience and instructors are considered to be subject matter experts in their respective fields. Instructors are evaluated regularly by students and NVTSI staff. New Horizons Learning Centers' instructors average 10 years' experience providing training in their respective fields.

Training Coordinator

NVTSI's Executive Director will manage the proposed ETP project. NVTSI will also utilize a Program Coordinator who will be responsible for conducting needs assessments, scheduling training and collecting ETP rosters. National Training Company, Inc. will provide administrative services for the proposed training plan and will assist with inputting data into the ETP Online Systems.

NVTSI schedules all REBOOT training courses on site at its San Diego location and communicates with all instructors of those training sessions. The REBOOT Plus Project Management section of training, will also occur at NVTSI's San Diego location. NVTSI's Executive Director and Program Coordinator will work with the Project Coordinator at New Horizons to schedule training and collect ETP rosters.

Tuition Reimbursement

In accordance with Title 22, CCR, Section 4412.1, NVTSI represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Higher support costs are provided to enable entities to reach participants for this program.

- Incidental Placement: Placement with public and nonprofit entities is permissible, not to exceed 25%.

- Curriculum: At least 50% of total training must consist of vocational skills training.

- Retention: Full-time employment definition is reduced 30 hours per week during the consecutive 90-day retention period.

Trainer-to-Trainee Ratio

The trainer-to-trainee ratio for new-hires is 1:15. NVTSI is requesting a waiver to hold classes at 1:20 because the REBOOT classes are normally held with between 20-25 trainees per trainer which has proven to be the most effective class size in which trainees bond with one another and create more of a "buy-in." The trainer-to-trainee ratio will not be more than 1:20.

In order to ensure that the training model is meeting the needs of trainees, each trainee fills out a pre- and post-program survey to determine if their needs were met while in the program. NVTSI also asks each trainee to fill out a course critique after each module of training to ensure that both instructors and the class sizes are meeting the needs of the students. ETP Staff recommends the waiver to increase the trainer-to-trainee ratio to 1:20.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

NVTSI retained National Training Company Inc. in Irvine to assist with development of this proposal for a flat fee of $10,000.

ADMINISTRATIVE SERVICES

NVTSI also retained National Training Company Inc. to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

KML Enterprises Career Development, LLC dba New Horizons Learning Group of Anaheim has been retained to provide training for Business Skills, Computer Skills, and Continuous Improvement for a fee of $61,000. Other trainers will be identified for ETP record-keeping purposes, as they are retained.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Processes
- Communication Skills
- Creating Action Plans
- Goal Setting
- Project Management
- Time Management

COMPUTER SKILLS

- Cybersecurity
- Internet Security Systems
- Information Technology Solutions/Internet Tools
- MS Office (Beginning, Intermediate and Advanced)
- MS Project
- Website Social Networking
- Windows Server Support and Maintenance
- Windows Techniques

CONTINUOUS IMPROVEMENT

- Coaching
- Critical Thinking Skills
- Decision Making
- Goal Setting
- Leadership Skills
- Measuring for Success
- Process Analysis
- Problem Solving and Resolution
- Team Building

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.

Training Proposal for:

Northern California Shop Ironworkers Local 790 Apprenticeship and Training Trust Fund

Agreement Number: ET17-0903

Panel Meeting of: August 26, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** D. Woodside

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Apprenticeship	Industry Sector:	Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	Northern California Counties	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☒ Yes ☐ No International Association of Bridge, Structural and Ornamental Ironworkers Local 790		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$47,424		$3,296 8%		$50,720

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Apprentice Retrainee	Commercial Skills	32	8-200	0	$1,585	$19.46*
				Weighted Avg: 114			

Minimum Wage by County: $21.28 per hour Statewide (Priority Industry)

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $5.09 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Apprentice Shop Ironworker		32

*DAS-approved standards for this program list minimum wages for Apprentices; however, most wages are above these minimums and actual wage increases are calculated through the individual method described above.

INTRODUCTION

In the 1940's, the Northern California Shop Ironworkers Joint Apprenticeship Committee, operating through Local 790 Apprenticeship and Training Trust Fund (NoCal Shop Ironworkers Trust) was established by collective bargaining between the Western Steel Council (representing employers) and the Shop Ironworkers Local 790 (labor). The training trust provides Apprentice and Journeyman training to persons engaged in the manufacture or fabrication of iron, steel, metal and other products, including pre-cast and pre-stressed concrete products.

Shop Ironworkers fabricate the individual steel components that form the structural steel framework for buildings and bridges. Other areas of metal fabrication include building metal stairs, handrails and various ornamental metal products using steel, aluminum, copper and brass, which are manufactured by the shop ironworker mechanic. Shop ironworkers work in a manufacturing setting, as distinct from field ironworkers, who erect fabricated iron at job sites. This is a non-traditional Apprenticeship program, distinct from the Building Trades.

The Trust serves 200 Journeymen and 32 Apprentices (Note: Six more Apprentices will begin the program later in 2016). These individuals work primarily in the San Francisco Bay area; however, the Trust has jurisdiction over 46 Northern California counties. Apprenticeship training will take place in Benicia and Hayward. This proposal funds Apprenticeship training only.

This is the first ETP Agreement between ETP and NoCal Shop Ironworkers Trust.

Employer Demand

Employers need higher skilled Shop Ironworkers to compete for work against foreign and domestic competition. This project will help these employers meet this goal by giving their workers the specific skills to systematically read blueprints, lay out jobs, and fabricate steel systems and components in an efficient and cost-effective manner. Sixteen out of seventeen potential employers are small businesses employing 100 or fewer workers. These companies depend on the Trust to provide this customized 4-year classroom/laboratory training program to their Apprentices. ETP funding will also assist the Trust provide higher quality training with up-to-date equipment and training materials.

Apprenticeship Pilot

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the DAS. ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case, the program is four years.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC), as here. A JATC is created through collective bargaining, with an equal number of members appointed by union and management with employer contributions to a training trust fund. The employers are not “participants” but are signatories to the Collective Bargaining Agreement.

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (in this case Petaluma Adult School). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship Pilot reimbursement is reduced by $5.00, reducing the priority industry rate from $18.00 to $13.00 per hour. ETP funding will only apply to apprentices in Year 2 forward, to ensure commitment.

Typically, the ETP wage for Apprentices is no less than $21.28 per hour, tracking the Special Employment Training wage as modified for priority industries. However, in this case, the actual wages paid are shown in the Training Plan Table and contract to reflect the wage system outlined in the collective bargaining agreement.

Union Shop Ironworker Apprentices, who work in a manufacturing environment, work under a unique system to determine Apprentice wages. Each employer sets entry-level wage rates for Apprentices. A separate wage progression is calculated for each Apprentice each year until the Apprentice reaches the Journeyman Wage rate, which is included in the collective bargaining agreement. There are eight wage steps for each Apprentice. Every year the trust takes the difference between each Apprentice’s current wage and the Journeyman wage and divides it by the number of steps each Apprentice has left to complete. The result is the Apprentices’ required wage increase.

PROJECT DETAILS

All training is center-based and trainers are qualified Journeymen with extensive practical and training experience. ETP will fund Commercial Skills training under this proposal.

Commercial Skills (100%)

Training will help Apprentices gain the skills needed to work safely and productively in the trade. They will learn blueprint reading, math, welding, layout and fabrication skills enabling them to work as a productive member of fabrication teams.

Curriculum Development

Employer needs are communicated to the Trust through contractors represented by the JAC. Trainees provide feedback through their union representatives on the JAC on their success in using skills learned in training to obtain work. Curriculum is developed by the fabrication industry with national and local input. The JAC continuously reviews and updates the curriculum, training materials, and training facilities based upon the industry expertise of the membership.

Impact/Outcome

Apprentices trained under this proposal will be certified as journeymen once they complete the entire apprentice curriculum.

Commitment to Training

The signatory employers will continue to pay into the Trust for Apprentice training. In addition, employers must provide structured, on-the-job training for Apprentices that meet DAS standards. ETP funds supplement and do not displace employer contributions to training. Safety training is provided by the participating employers in accordance with all requirements under state and federal law.

Marketing and Support Costs

NoCal Shop Ironworkers trust is requesting 8% in support costs to fund recruitment and conduct ongoing assessments of employer-specific job requirements. Two staff will work part time to assist with marketing, recruitment, needs assessments and schedule training, Although many of the participating employers have already been recruited, additional recruitment will take place to complete the project and replace any employers whose training needs change since the project planning process began. Assessment of employer-specific job requirements will all take place during the term of the contract. Staff recommends the 8% in support costs.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of $2,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories will also perform administration services for an amount not to exceed 12.2% of payment earned.

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours
8–200

Trainees may receive any of the following:

COMMERCIAL SKILLS

Year 2

- Structural I: Layout and fitting of structural steel members roof and floor: beam, tubing and pipe column
- Workplace safety and power machinery operation: Understanding the relationship between a safe work environment, steel fabrication procedures and operation of power machinery used in a steel fabrication shop.
- Structural II: Procedure for layout and fitting of structural steel members including trusses, left hand beams and column, usage of transit for shop layout application and fastening procedures (bolts) used in shop assembly of structural steel.

Year 3

- Structural III—Methods and procedures for the development and layout of templates and patterns used in structural steel fabrication.
- Welding: Code of Standard Practice for Steel buildings. Application of codes and standards requirements in the quality control of fabrication, welding and inspection of fabricated structural steel products.
- Metal stair layout and fabrication: The principles and procedure relating to layout and fabrication of metal stairs.

Year 4

- Metal railing—layout and fitting
- Ornamental metal fabrication: Procedures and processes used in the fabrication of architectural exposed non-ferrous metal products.
- Press brake operation and safety
- Blueprint reading II—principles of reading and interpreting structural steel engineering design blueprints used to build steel frame buildings.

Note: Reimbursement for retraining is capped at 200 total training hours regardless of method of delivery.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Northrop Grumman Technical Services, Inc.
Agreement Number: ET17-0177

Panel Meeting of: August 26, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Veterans	Industry Sector(s):	Aerospace and Defense Priority Industry: ☒ Yes ☐ No
Counties Served:	San Bernardino	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No Teamsters Local 166		

Number of Employees in:	CA: 7,000	U.S.: 30,000	Worldwide: 65,000
Turnover Rate:	4%		
Managers/Supervisors: (% of total trainees)	5%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$207,040		$62,360 (30%)	$0		$144,680

In-Kind Contribution:	100% of Total ETP Funding Required	$289,700

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp., HazMat, Mgmnt. Skills, PL-Comm'l Skills	300	8-200	0-40	*302	$15.60
				Weighted Avg: 24			
2	Retrainee Veterans	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp., HazMat, Mgmnt. Skills, PL-Comm'l Skills	160	8-200	0-40	*$338	$15.60
				Weighted Avg: 22			

*Reflects Substantial Contribution

Minimum Wage by County: Job Numbers 1 & 2: $15.60 per hour for San Bernardino County.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 & 2		
Laborer		15
Computer Operator		6
Payroll Clerk/Clerk		45
Tool Room Attendant		11
Trades Helper		19
Property Management		6
Human Resource Staff		2
Administrative Assistant		3
Stock Control Staff		4
Production Control		4
Quality Analyst		5
Network Tech		5

Logistics Planner		18
Vehicle Mechanic		220
Technical Inspector		30
Manager/Supervisor		25
Lead		30
Vehicle Support Tech		5
Production Analyst		5
Welder		2

INTRODUCTION

Northrop Grumman Technical Services, Inc. (Northrop Grumman TS) is a wholly owned subsidiary of Northrop Grumman Corporation. Training under this proposal will be only for the Company's facility located at the Fort Irwin Military base. This location is dedicated to providing services for the U.S. Army 916th Sustainment Brigade Mojave Desert. Services include vehicle maintenance, warehouse supply services/operations, logistics, land forces sustainment/modernization, program management, mission readiness/training and quality assurance.

Training under this proposal will only take place at Northrop Grumman TS located at Fort Irwin. There have been four Single Employer Agreements with the parent company in the last five years (one at Fort Irwin).

Union Support

The Teamsters Union Local 166 represents all occupations with the exception of Human Resource Specialists, Quality Analyst, Network Technicians and Logistics Planners. The Union has provided a letter supporting the proposed training plan.

PROJECT DETAILS

As a U.S. Army service provider, Northrop Grumman TS is exposed to new equipment and vehicles purchased by the military, on an ongoing basis. Under the Company's last agreement, (ET15-0108) training focused on Commercial and Computer Skills training. Under that agreement, the Company launched a training program, *Ready Blue*, to streamline production activities through an automated web-based system. Training was also provided to Trades-Helpers and Mechanics to learn new skills in maintenance and repairs on military vehicles.

Training in Commercial and Computer Skills training will remain a primary focus under this proposal with a focus on technology upgrades and modifications to equipment and software. Upgrades include HVAC maintenance and engine modifications (new modern electronic modules), and communications/computer software systems.

Computer Skills training will be delivered to all staff on a new Enterprise Resource Planning (ERP) system. This system combines maintenance, supply, property, and financial data in one oppose to utilizing multiple computer programs. Employee skills are continuously monitored by government contract representatives to ensure Northrop Grumman TS staff meets all requirements necessary to perform services on military vehicles and equipment. As a result,

training provided will increase employee skills and make certain they are meeting government requirements and expectations.

Additional training topics to be delivered include Continuous Improvement, Business Skills, Management Skills, and Hazardous Materials. Training topics will cover new techniques and process improvement methods such as six sigma (lean skills), project management, communication and leadership skills, and strategic planning.

Training Plan

In-house instructors will deliver training via class/lab, Productive Lab (PL) and computer-based training (CBT).

Business Skills (10%): Training will be offered to Logistics Planners, Production Analysts, Stock Control Staff and Managers. Course topics will increase employee skills in customer service, conflict management, and business performance.

Commercial Skills (60%): Training will be offered to Vehicle Mechanics in maintenance repairs and procedures, diagnostic and troubleshooting engine systems, and tactical vehicle operations. Mechanics will also receive training to modify older model vehicles to improve electronic and mechanical software of HVAC vehicles.

Management Skills (5%): Training will be offered to Managers/Supervisors and Leads. Leadership roles require training to improve engagement with staff workers. Course delivered include leadership training, performance management and positive engagement.

Computer Skills (10%): Training will be offered to all occupations in new upgrades and computer software programs purchased by the company.

Hazardous Materials (4%): Training will be offered to Vehicle Mechanics, Managers/Supervisors and Leads. HazMat training will teach staff how to handle hazardous materials and chemicals encountered at the facility. This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander”. It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT.

Continuous Improvement (5%): Training will be offered to all occupations to increase efficiency and improve employee skill sets. Courses provided include 5S (lean skills), corrective/prevention action, leadership skills and project management.

CBT-Computer Skills (1%): Training will be offered to all occupations to learn how to utilize the US Army’s computer system. Couse modules include plant maintenance, organizational supply, material management and support system reports. Trainees may receive up to 40 hours of training in CBT.

Productive Laboratory (5%):

The Panel recently adopted regulations to authorize reimbursement for training delivered in a PL setting. PL trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

The Company seeks PL delivery for its transitional Trades-Helper to Mechanic training program. Trainees are placed with mentors who teach maintenance procedures of various military tactical and non-tactical vehicles. Military vehicles and maintenance equipment will be used to perform

diagnosis and maintenance of vehicles to ensure trainees can provide service in accordance with US Army requirements. Northrop Grumman TS requests a maximum of 60 PL training hours and a ratio of 1:3 for the Trades Helper and Mechanics occupational titles.

The average Trades-Helper must complete approximately 100 to 130 tasks to become a Mechanic. Tasks assigned include performing biennial service on High Mobility Multipurpose Wheeled Vehicles and HVAC maintenance and repair. The mentors are qualified experienced Mechanics. They provide training to Trades-Helpers as well as teach current Mechanics new equipment maintenance and operation procedures for military vehicles. Under the trainer's supervision, the trainee provides maintenance and repair services on military vehicles in a PL setting following class/lab instruction.

The trainer-to-trainee ratio in most cases will be 1:1; however, Northrop Grumman TS requests to increase the trainee ratio to 1:3. This ratio was approved under the last Agreement (ET15-0108). The Mechanics occupation is considered a unique position that requires specialized skill sets to conduct work on specialized military vehicles. As a result, recruitment for qualified trainers in this program is often limited. Therefore, Northrop Grumman TS is unable to dedicate a single Mechanic to one Trades-Helper. Many of the tasks assigned require a two-person minimum as a safety precaution when conducting repair services to these vehicles. It is standard practice for Northrop Grumman TS to deliver curriculum topics by a single instructor to two to three Trades-Helpers.

Veterans Program

A total of 160 Veterans will be trained by Northrop Grumman TS under this Agreement (Job Number 2). The Panel has established a higher reimbursement rate and other incentives for training California veterans. These trainees served on active full-time duty in the Armed Forces, including the California National Guard, and were (a) honorably discharged, or (b) released from active duty because of a service-connected disability.

Substantial Contribution

Northrop Grumman TS is a repeat contractor with payment earned in excess of $250,000 within the past five years and a former Substantial Contribution at the 15% level under the prior Agreement (ET15-0108), at the Fort Irwin facility. The Company received training from Chaffey College as a participating employer under prior ETP Agreements. Accordingly, reimbursement for trainees at this facility in Job Numbers 1 & 2 will be reduced by 30% to reflect the Company's $62,360 Substantial Contribution to the cost of training.

There is one Single Employer Agreement with Northrop Grumman TS with earnings below $250k. However, the Company participated in a MEC and was given a 15% substantial contribution under ET15-0108. As a result, there will be a Substantial Contribution of 30% on that basis, as discussed further below.

Commitment to Training

Northrop Grumman TS spends approximately $500,000 annually in training at its Fort Irwin location. Training currently revolves around Commercial Skills training, anti-terrorism and operations security. Training is mandated and provided to all four sections at the facility (Logistics, Supply, Mechanics and Production).

Northrop Grumman TS represents that ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  A training coordinator and quality manager will oversee all administrative duties. Section supervisors will determine appropriate training and schedule training accordingly. The training coordinator will monitor training and ensure ETP rosters are completed correctly.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Northrop Grumman TS under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET15-0108	Fort Irwin	07/07/14-07/06/16	$327,257	$168,644 (51%)

ET15-0108: Midway through the Agreement, Northrop Grumman TS renegotiated their contract with the U.S. Army. At the start of the Agreement, Northrop Grumman TS had 720 employees eligible to participate in ETP-funded training. Unfortunately, following renegotiations, the direct employee count decreased to 450. Although training was delivered, many staff were no longer employed full-time. This change decreased the number of training hours eligible for ETP reimbursement.

During the term of the Agreement, the in-house contract representative also changed, and training hours went undocumented. In November after management became aware of this problem, staff began to document training in accordance with ETP standards.

Based on ETP Systems, 9,240 reimbursable hours have been tracked for potential earnings of $168,644 (51% of approved amount). The current proposal has been right-sized consistent with this level of performance.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Performance (Accounting, Payroll, Business Mgmt., Inventory
- Control, Product Control
- Project Mgmt. (Planning, Monitoring, etc.)
- Communication (Report writing, Conflict Mgmt., Interpersonal Skills)
- Customer Service (Relations/Needs/Requests/Complaints)

COMMERCIAL SKILLS

- Advanced Maintenance Procedures (Tactical/Non-Tactical)
- Diagnostic/Trouble Shooting Engine/Systems
- HVAC Maintenance
- Tactical Vehicle Familiarization/Operations
- Preventive Maintenance Checks and Services
- Winch Recovery Systems
- New Equipment Familiarization/Maintenance (Tactical/Non-Tactical)
- Ground Guiding Procedures
- Tactical Vehicle Communications Systems Maintenance
- Logistics Planning/Monitoring

COMPUTER SKILLS

- GCSS-Army Familiarization/Usage
- Information Systems Familiarization/Usage
- Ready Blue System Familiarization/Usage
- CPOF Familiarization/Usage
- BUB Production/Display

CONTINUOUS IMPROVEMENT

- 5S
- Continuous Improvement
- Corrective Action/Preventive Action
- ISO Audits
- Leadership for Frontline Workers
- Project Management
- Quality Management/Root Cause Analysis
- Six Sigma
- Strategic Planning

HAZARDOUS MATERIALS

- Hazardous Materials Handling
- Hazardous Communication
- Hazardous Materials Awareness

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Leadership Training
- Manager's Compensation Planning
- Performance Management
- Positive Engagement

Safety Training cannot exceed 10% of total training hours per-trainee (This cap does not apply to Hazmat)

Productive Lab Hours (1:3)

0-60

COMMERCIAL SKILLS

- Trades Helper to Mechanic Training
  - Advance Maintenance Procedure
  - Alternator
  - Axle and Tire Assembly
  - Battery
  - Boom Hoist
  - Brake Systems
  - CTIS Systems
  - Diagnostics/Troubleshooting Engine
  - Drive Belts
  - Drive Train Malfunctions
  - Electrical
  - Electrical Gauges
  - Electrical System
  - Engine Oil Cooler/Lines
  - Fuel Systems Malfunctions
  - Generator Set
  - Ground Guide Procedures
  - HVAC
  - Maintenance Familiarization
  - MRAP Certification
  - Operation of MRAP
  - Recovery Procedures Overview
  - Replace Muffler
  - Replace Shock Absorber
  - Replace Starter
  - Replace Water Pumps
  - Service Engine Assembly
  - Steering Systems/Tie Rod Assembly
  - Transmission
  - Transmission Assembly
  - Troubleshooting and repairs
  - Vehicle Characteristics
  - Vehicle Driving Operations
  - Vehicle Preventive Maintenance Checks and Services
  - Vehicle Self Recovery/Auxiliary Equipment/Flat Tow
  - Winch System

CBT Hours	
0-40	**COMPUTER SKILLS** • Global Combat Support System-Army Familiarization/Usage (40)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee excluding HAZMAT. PL is capped at 60 hours per-trainee.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Performance (Accounting, Payroll, Business Mgmt., Inventory
- Control, Product Control
- Project Mgmt. (Planning, Monitoring, etc.)
- Communication (Report writing, Conflict Mgmt., Interpersonal Skills)
- Customer Service (Relations/Needs/Requests/Complaints)

COMMERCIAL SKILLS

- Advanced Maintenance Procedures (Tactical/Non-Tactical)
- Diagnostic/Trouble Shooting Engine/Systems
- HVAC Maintenance
- Tactical Vehicle Familiarization/Operations
- Preventive Maintenance Checks and Services
- Winch Recovery Systems
- New Equipment Familiarization/Maintenance (Tactical/Non-Tactical)
- Ground Guiding Procedures
- Tactical Vehicle Communications Systems Maintenance
- Logistics Planning/Monitoring

COMPUTER SKILLS

- GCSS-Army Familiarization/Usage
- Information Systems Familiarization/Usage
- Ready Blue System Familiarization/Usage
- CPOF Familiarization/Usage
- BUB Production/Display

CONTINUOUS IMPROVEMENT

- 5S
- Continuous Improvement
- Corrective Action/Preventive Action
- ISO Audits
- Leadership for Frontline Workers
- Project Management
- Quality Management/Root Cause Analysis
- Six Sigma
- Strategic Planning

HAZARDOUS MATERIALS

- Hazardous Materials Handling
- Hazardous Communication
- Hazardous Materials Awareness

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Leadership Training
- Manager's Compensation Planning
- Performance Management
- Positive Engagement

Safety Training cannot exceed 10% of total training hours per-trainee (This cap does not apply to Hazmat)

Productive Lab Hours (1:3)

0-60

COMMERCIAL SKILLS

- Trades Helper to Mechanic Training
  - Advance Maintenance Procedure
  - Alternator
  - Axle and Tire Assembly
  - Battery
  - Boom Hoist
  - Brake Systems
  - CTIS Systems
  - Diagnostics/Troubleshooting Engine
  - Drive Belts
  - Drive Train Malfunctions
  - Electrical
  - Electrical Gauges
  - Electrical System
  - Engine Oil Cooler/Lines
  - Fuel Systems Malfunctions
  - Generator Set
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  - Recovery Procedures Overview
  - Replace Muffler
  - Replace Shock Absorber
  - Replace Starter
  - Replace Water Pumps
  - Service Engine Assembly
  - Steering Systems/Tie Rod Assembly
  - Transmission
  - Transmission Assembly
  - Troubleshooting and repairs
  - Vehicle Characteristics
  - Vehicle Driving Operations
  - Vehicle Preventive Maintenance Checks and Services
  - Vehicle Self Recovery/Auxiliary Equipment/Flat Tow
  - Winch System

CBT Hours	
0-40	**COMPUTER SKILLS** • Global Combat Support System-Army Familiarization/Usage (40)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee excluding HAZMAT. PL is capped at 60 hours per-trainee.

TEAMSTERS, CHAUFFEURS, WAREHOUSEMEN,
INDUSTRIAL & ALLIED WORKERS OF AMERICA
LOCAL UNION No. 166
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Trustee

ROBERT STANLEY
Trustee

May 10, 2016

Bernie Calderon
Northrop Grumman TS
PO Box 11159
Ft. Irwin, Ca. 92310

RE: California Employment Training Panel (ETP)

Dear Bernie Calderon,

The Teamsters Union Local 166 hereby endorses the Company (Northrop Grumman) In its efforts to secure more technical and interpersonal skills for our Teamsters members employed at Ft. Irwin, Ca. through the ETP.

The Union understands that the training shall be done in accordance with the current Collective Bargaining Agreement.

Sincerely,

Jason R. Hodge
Vice President/Business Representative
Teamsters Local 166

Cc: Mike Bergen
Secretary Treasurer
Teamsters Local 166

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Onestop Internet, Inc.

Agreement Number: ET17-0203

Panel Meeting of: August 26, 2016

ETP Regional Office: North Hollywood **Analyst:** L. Vuong

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee HUA	Industry Sector(s):	Services Technology/IT Warehousing Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 237	U.S.: 245	Worldwide: 245
Turnover Rate:	1%		
Managers/Supervisors: (% of total trainees)	11%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$130,410		$0	$0		$130,410

In-Kind Contribution:	100% of Total ETP Funding Required	$296,900

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Adv. Technology, Business Skills, Computer Skills	127	8-200	0	$810	$16.62
				Weighted Avg: 45			
2	Retrainee Priority Rate HUA	Business Skills, Computer Skills	34	8-200	0	$810	*$14.00
				Weighted Avg: 45			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: $16.48 per hour for Job Number 1 for Los Angeles County; and $12.36 for Job Number 2 (HUA) for Los Angeles County.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe

Although health benefits are being provided, they are not being used to meet the Post Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Accounting Staff		8
E-Commerce Marketing Staff		19
Engineer		42
IT Staff		5
Manager/Supervisor		13
Operational Staff		40
Job Number 2		
Guest Services Staff		30
Manager/Supervisor		4

INTRODUCTION

Founded in 2004, Onestop Internet, Inc. (Onestop) (www.onestop.com) provides a full-spectrum of e-commerce development and management services for companies. The Company designs, builds, and manages e-commerce websites to help customers sell and fulfill their products online. Its services include marketing, integration, hosting, merchandising, website design, customer service, and product photography. The Company also offers warehousing and distribution services for its customers. Customers include Juicy Couture, RVCA, Paul Frank,

True Religion, Coffee Bean & Tea Leaf, and Definitive Technology. Headquartered in El Segundo, the Company has two facilities in California (El Segundo and Compton) and one facility in New York. El Segundo and Compton facilities will participate in this project.

The Company is eligible for standard ETP funding as a service provider facing out-of-state competition. The Company is also eligible for priority reimbursement as a NAICS eligible employer (Process, Physical Distribution, and Logistics Consulting Services).

PROJECT DETAILS

ETP funding will allow its workforce to be part of the Company's vision to continue to lead in the e-commerce marketplace, attracting new and bigger clients, and servicing its customers with the most cutting edge products. Onestop must upgrade and continue its adaptation to a high performance workplace, support growth, and maintain its world-class customer service. The Company must expand its infrastructure, increase operations, upgrade worker job skills and adapt to new technology. The Company is currently transitioning to Magento, Deposco, Logic Brokers and RJ Metrics, new software systems for shipping, recording, and different aspects of the business that will improve and standardize processes. As the Company grows, training is imperative to the Company's success. The Company mainly promotes from within, thus training is essential to the Company's business operations. Training will enhance trainee job security, providing employees the necessary tools to be successful in their jobs and contribute to the Company's success.

Training Plan

Training will take place at the Company's facilities in El Segundo and Compton. Training will be provided by in-house subject matter experts. Vendors will be identified, if needed. Courses will be delivered via Class/Lab and Videoconference as outlined below:

Business Skills (30%): Training will be offered to all occupations. Trainees will gain the knowledge and skills, including customer service, product knowledge, organization, and overall business functions, to improve job performance.

Computer Skills (20%): Training will be offered to all occupations. Trainees will receive highly technical skills to effectively use the Company's hardware and software programs as well as coding and operation systems.

Advanced Technology (50%)

Advanced Technology will be offered to Engineers and IT Staff in Job Number 1. Training will provide trainees with highly technical skills to effectively use the Company's advanced hardware and software programs as well as coding and operation system. Onestop is requesting the AT reimbursement rate for this training. Training requires the use of expensive equipment, specially trained instructors, innovative computer software, and advanced and sophisticated systems such as .NET, PHP, Java, Magento, Orchard, Security devices, and the Linux System. Due to the highly technical nature of training, the trainer-to-trainee ratio will not exceed 1:10, allowing in-depth coverage and personal attention.

Commitment to Training

Onestop has an annual training budget of approximately $250,000 for El Segundo and Compton facilities and also invests approximately $500,000 per year in new equipment and software and computer updates. The Company's current training consists of general safety, new hire orientation, extensive and basic computer skills, sexual harassment prevention and regulatory

training. In addition, the Company has created its own in-house school, Onestop University, dedicated to train its engineers.

ETP funds will not displace the existing financial commitment to training. ETP funds will support the Company's going financial commitment in training. After the completion of the ETP training, the Company will continue to provide its workforce the skillsets they need to develop and grow within the Company. Enhancing employee's skills will create additional sales, increase profits, and business growth. Safety training will continue to be provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

Training is scheduled to begin upon Panel approval of this project. Onestop has designated a team that includes the HR Manager and Department Managers to oversee ETP training and administrative responsibilities. Administrative duties include scheduling, managing, delivering, and documenting training. The Company will also utilize a third party administrator for enrollment, data tracking and invoicing. (See Administrative Services below)

High Unemployment Area

All trainees in Job Number 2 work in Los Angeles County, a High Unemployment Area (HUA) with unemployment exceeding the state average by 25%. The Company's location in Compton qualifies for HUA status under these standards.

The Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. Onestop is requesting a 15% modification to the post-retention wage for Job Number 2 (from $16.48 per hour to $14.00 per hour).

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Onestop retained RSM US, LLP (RSM) in Los Angeles to assist with development of this proposal for a flat fee of $5,000.

ADMINISTRATIVE SERVICES

RSM will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

ADVANCED TECHNOLOGY

- Computer Networking
- Local Area Networks (LAN)
- Wide Area Network (WAN)
- Network Management
- Certified Novell Assistant (CNA)
- Certified Network Engineer (CNE)
- Lynx
- Cisco IOS (Internetwork Operating System)
- Magento
- Deposco
- Logic Brokers
- RJ Metrics
- PhpStorm
- Photoshop
- Visual Studio
- Marketing Industry Technology Tools for Search Engine Optimization (SEO)
- Pay Per Click (PPC), Display and Social
- Software Development
- Software Testing

BUSINESS SKILLS

- New Accounting Pronouncement
- Financial Strategies
- Product Knowledge
- Project Management
- Strategic Planning
- Evaluations
- Monitoring
- Communication Skills
- Business and Report Writing and Editing
- Negotiating
- Conflict Management
- Interpersonal Skills
- Customer Relations Skills
- Resolving Customer Complaints
- Basic & Intermediate Accounting Practices
- Marketing Analytic Tools
- Leadership
- Decision Making
- Team Building
- Coaching
- Goal Setting/Performance

COMPUTER SKILLS

- Report Management
- Payroll System Applications
- Microsoft Office Suite – Intermediate/Advance

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.

Retrainee – Job Creation
Training Proposal for:

PAMC, Ltd. dba Pacific Alliance Medical Center, Inc.

Agreement Number: ET17-0184

Panel Meeting of: August 26, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Paccerelli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative SET Medical Skills Training	Industry Sector(s):	Healthcare Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Number of Employees in:	CA: 799	U.S.: 799	Worldwide: 799
Turnover Rate:	13%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$346,560		$97,216 (30% Job 1)	$0		$249,344

In-Kind Contribution:	100% of Total ETP Funding Required	$478,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate Medical Skills Training SET	MST Didactic & Clinical Preceptor, Cont. Improvement, Computer Skills; Commercial Skills	448	8-200	0-13	*$503	$21.28
				Weighted Avg: 40			
2	Retrainee Priority Rate Job Creation Initiative Medical Skills Training SET	MST Didactic & Clinical Preceptor, Cont. Improvement, Computer Skills; Commercial Skills	30	8-200	0-13	$800	**$13.73
				Weighted Avg: 40			

*Reflects Substantial Contribution
**It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Number 1 (SET/Priority Industry): $21.28 per hour statewide; Job Number 2 (Job Creation): $13.73 per hour in Los Angeles County

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $2.30 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Registered Nurse		300
Licensed Vocational Nurse		8
Certified Nurse Assistant		6
Therapist		35
Technician		42
Medical Assistant		2
Social Worker		3
IT Support Staff		12
Patient Care Support Staff		40
Job Number 2		
New Graduate RN		13
Registered Nurse		5
Licensed Vocational Nurse		1

Certified Nurse Assistant		2
Therapist		1
Technician		1
Medical Assistant		1
Social Worker		1
IT Support Staff		2
Patient Care Support Staff		3

INTRODUCTION

PAMC, Ltd. dba Pacific Alliance Medical Center, Inc. (PAMC) (www.pamc.net) is among the oldest hospitals in Los Angeles, dating back to the 1860's. It is an inner city, fully licensed and accredited acute care, general medical and surgical facility.

The medical center maintains a 24-hour urgent care unit and provides surgical services including Bronchoscopy, Gastroenterology, General Surgery, Neurosurgery, Obstetrics, Gynecology, Ophthalmology, Orthopedic Surgery, Otolaryngology, Plastic Surgery, and Urology. Other services include Intensive Care, Wound Care, Cardiopulmonary Laboratory, Clinical Laboratory, Dual Diagnosis Med-Surgical Unit, Physical Therapy, Radiology, CT Scans and Mammography, Hyperbaric Oxygen Therapy, and Outpatient Cardiac Center as well as the Downtown Coordinated Care Center.

According to PAMC, the patient population demographic has changed dramatically with more diverse ethnicity and complicated medical conditions, many with dual diagnosis. With the enforcement of the Affordable Care Act, hospitals are currently challenged to provide high quality, affordable patient care services to a population of middle-aged patients. Many patients have not sought medical attention for years until symptoms become intensified and diagnosis more severe; therefore, requiring intense care and treatment. To keep up with the increase in patient care demand, PAMC needs additional staff and training on advanced and critical care skills.

In addition, as PAMC moves further into electronic documentation, training in the use of new software and updates is necessary to ensure competency and accuracy for quality and patient safety. PAMC will upgrade of its MEDITECH system, investing $150,000 for hardware updates in its Bedside Medication Verification process, Electronic Prescription, Dr. First EPCS (Electronic Prescription for Controlled Substances), Charging, Philips Monitor Interface Kronos Staffing and Medtronic Vital Sync Patient Monitoring. PAMC is also investing $259,478 in a portable computer system called WOW (Workstation On Wheels) which allows nurses to document and retrieve information when they go to the patient's room in real time.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Newly hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

PAMC has committed to hiring 30 new employees (Job Number 2). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract. As a feature of this program, the Substantial Contribution requirement is waived (Job Number 2).

PAMC is creating new jobs to keep up with the escalating high demand of its patient population. The Urgent Care Department has become increasingly busy and census population has increased significantly since it was refurbished a few years ago; therefore, creating a higher demand for patient care.

With its $400K investment in computer system and expansion of its services, PAMC has committed to hiring new employees during the term of this proposal. The additional new employees will allow PAMC to maintain adequate staffing ratios and support expanded hospital service.

PROJECT DETAILS

Training Plan

Training will take place at the PAMC's facility in Los Angeles and will be delivered by in-house subject matter experts and training vendors retained during the contract term.

Medical Skills Training (65%): The Panel has established a "blended" reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model. Training will be offered to all nurses (RN, LVN and CNA) in both Clinical-Preceptor and Didactic environments. Some allied healthcare occupations listed herein will receive Medical Skills Didactic training topics that are specific to their roles. Recognizing a higher cost of delivery for clinical skills training, the $22 per hour rate, will apply to both Didactic and Preceptor modes of delivery.

Classroom training (Didactic) will be provided to all nurses in various advanced or technical topics designed to enhance skill sets and orient the new hires to PAMC's patient care models. New Graduate RN trainees will receive a broad spectrum of topics to prepare them for patient care in their assigned hospital units. Clinical Preceptor training will be delivered to nurses with emphasis on bedside skills in specific units. New and incumbent nurses that are cross-trained will work with a Preceptor to validate skills and become familiar with patient acuity levels and the level of care that the hospital requires.

Computer Skills (20%): Training will be offered to all occupations in PAMC's healthcare information systems and electronic medical record technology to track, control and document vital patient data. Training will provide accurate documentation on patient charts; completing reports quickly and proficiently; and using electronic communications.

Continuous Improvement (10%): Training will be offered to all occupations in the skills necessary to assimilate into their assigned units with an understanding of quality standards, processes and procedures, and other skills to function within their team.

Commercial Skills (5%): Training will be provided via Computer-Based training (CBT) up to 13 hours to all nurses and allied health care professionals. CBT will supplement the trainees' class/lab hours and are a necessary part of staff's daily tasks. CBT is capped at 50% of the total training hours per trainee.

Special Employment Training/Wage Modification

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage of $28.37 at the end of retention.

Trainees employed in a priority industry qualify for a SET wage modification up to 25% below the statewide average hourly wage. HPMC requests this wage modification from $28.38 to $21.28 for trainees in Job Number 1.

Substantial Contribution

PAMC is a repeat contractor with payment earned in excess of $250,000 and a former Substantial Contribution at the 15% level, at the Los Angeles facility within the past five years (see Prior Project Tables below). Accordingly, reimbursement for trainees at this facility in Job Number 1 will be reduced by 30% for this project, to reflect the hospital's $97,216 Substantial Contribution to the cost of training. The Substantial Contribution requirement is not applicable for Retrainee – Job Creation trainees (Job Number 2).

Prior Projects

This will be PAMCs fourth ETP Agreement within the last five years. Prior ETP Agreements focused on the expansion of the Women's Center, new computer software in patient portal and healthcare data; and new equipment such as Rapid Hemodynamic Monitor, Bladder Scanner, Panda Warmer, NeoPap and Vein Light. ETP funds allowed PAMC to increase graduate nurse hiring to contend with an ongoing nursing shortage, raise the proficiency levels of all staff in core skills; and cross-train nurses in other disciplines.

The proposed training differs from and/or expands on training delivered in prior projects. Although some course titles may be similar in prior projects, there is no duplication of courses and the topics are updated and upgraded versions. Further, the training will focus on new computer software and equipment that has not been provided in prior projects.

Commitment to Training

PAMC represents that ETP funds will not displace the existing financial commitment to training. The Hospital's annual training budget is $900,000 and includes general orientation, fire safety, sexual harassment prevention, as well as basic job-specific skills training. The proposed training greatly exceeds any prior efforts, which have been limited due to lack of budget resources, increased payrolls caused by new nurse/patient ratios, the effects of managed care, and increased costs of medical technology that patients need.

The Hospital anticipates that the opportunity for enhanced training made possible by ETP funds will encourage an ongoing financial commitment in this area. PAMC will continue safety training in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  The Education Department will oversee all administration under the supervision of the Director of Education. As a repeat ETP contractor, PAMC has well-established internal administrative procedures to capture training using rosters completed according to ETP guidelines, which help maximize earnings and performance.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by PAMC under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET15-0288	$485,980	08/25/14 – 08/24/16	256	264	43

PAMC's projected performance is 100% based on the total reimbursable hours of $29,031 entered into the ETP Online System. This will result in projected earnings of the full-encumbered amount ($485,980). All trainees are expected to complete the retention period by August 2016, at which time, PAMC will submit the Final Closeout Invoice.

PRIOR PROJECTS

The following table summarizes performance by PAMC under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0163 (Retrainee Only)	Los Angeles	10/08/12 – 10/07/14	$251,424	$251,424 (100%)
ET12-0426 (Job Creation Only)	Los Angeles	06/30/12 – 06/29/14	$292,000	$292,000 (100%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

MEDICAL SKILLS TRAINING – CLINICAL PRECEPTOR

- **Behavioral Health/Psychiatric Acute Care Services Unit**
  - Patient Assessment & Care
  - Behavioral Health Nursing Skills
- **Urgent Care Training**
  - Urgent Care Nursing Skills
  - OB Trauma
  - Triage Nursing Skills
  - Care of Pediatric patients
  - Post Disaster Care
- **Hyperbaric Oxygen Therapy Unit**
  - Patient Assessment & Care
  - Medical/Surgical Nursing Skills
- **Medical/Surgical Unit Training**
  - Patient Assessment & Care
  - Medical/Surgical Nursing Skills
  - Pre and Post-Operative Care
  - Orthopedic Nursing Skills
  - Management of the Renal Dialysis Patient
  - Oncology Nursing Skills
- **Obstetrics Unit Training**
  - Patient Assessment & Care
  - Antepartum, Labor, Delivery and Postpartum Skills
  - Neonatal Nursing Skills
  - S.T.A.B.L.E.
  - Advanced & Electronic Fetal Monitoring
  - Neonatal Resuscitation Provider
  - Neonatal/Nursery Nursing Skills
  - Couplet Care
  - Breast Feeding/Skin-to-Skin Care
- **Operating Room and Post-Anesthesia Care Unit Training**
  - Patient Assessment & Care
  - Patient Positioning
  - Peri-operative Nursing Skills
  - Pre and Post-Operative Care
  - Trauma Nursing Skills
- **Pediatric Services Unit**
  - Care of Pediatric Patients
  - Patient Assessment & Care
  - Pre & Post-Operative Care
- **Special Care Unit Training**
  - Critical Care Nursing Skills
  - Patient Assessment & Care
  - Intracranial Pressure Monitoring & Ventriculostomy
  - Hemodynamic Monitoring
  - Pre and Post-Operative Care
  - Care of Trauma Patient

  - Management of the Renal Dialysis Patient
  - Total Parenteral Nutrition
  - Ventilator & Tracheotomy Care
- **Telemetry Unit Training**
  - Care of the Cardiac Patient
  - EKG & Cardiac Monitoring
  - Dysrhythmia Interpretation
  - Telemetry Nursing Skills
  - Pre and Post-Operative Care
  - Care if the Neurosurgical Patient
  - Intravenous Therapy
  - Oncology Nursing Skills
- **Surgical Services Unit Training**
  - Patient Assessment & Care
  - Trauma Nursing Skills
  - Surgical Nursing Skills
  - Pre and Post-Operative Care

MEDICAL SKILLS TRAINING – DIDACTIC

- Acute Myocardial Infarction
- Advanced Cardiac Life Support
- Arterial Blood Gas Interpretation
- Basic Life Support
- Body Mechanics
- Care of Bariatric Patient
- Care of the Cardiac Patient
- Care of the Neurosurgical Patient
- Care of Pediatric Patients
- Care of the Stroke Patient
- Central Lines Management
- Chest Tube Care & Management
- Code Blue Response & Procedures
- Complementary Alternative Methods Pain Management
- Critical Care Nursing Skills
- Crisis Prevention Intervention
- Decontamination Procedures
- Diabetes Care & Management
- Dual Diagnosis - Care & Management
- Dysrhythmia Recognition & Interpretation
- Educating the Patient & Family
- EKG & Cardiac Monitoring
- Electronic Fetal Monitoring (Beginning & Advanced)
- Emergency Room Nursing Skills
- Equipment Skills (IV pumps, cardiac telemetry, vital signs, pulse-oximeter, ventilators, specialty beds, etc.)
- Evidence Based Practices
- Gastrointestinal Assessment and Management
- Grief, Death Dying Coping Mechanism
- Hemodynamic Monitoring

- Infection Control
- Intra-Aortic Balloon Pump Therapy Intra-Cranial Pressure Monitoring & Ventriculostomy
- Intravenous Insertion & Therapy
- Labor, Delivery and Postpartum Nursing Skills
- Management of the Renal Dialysis Patient
- Medical/Surgical Nursing Skills
- Medication Administration & Management
- Moderate Sedation
- Neonatal Nursing Skills
- Neonatal Resuscitation Provider
- New Graduate Nursing Skills
- New Registered Nurse
- Nurse Orientation Training (New Grads only)
- Nursing Diagnosis Skills
- Nursing Process Skills
- Oncology Nursing Skills
- Orthopedic Nursing Skills
- Ostomy & Continence Care
- Pain Management (Acute & Chronic)
- Patient & Family Centered Care
- Patient Assessment & Care
- Patient Fall Prevention
- Pediatric Advanced Life Support
- Peri-Operative Nursing Skills
- PICC Line Insertion
- Pre and Post-Operative Care
- Psychiatric Nursing Skills
- Psychotropic Medications
- Rapid Response Skills
- Renal Assessment & Management
- Respiratory Assessment & Care
- Restraints
- Surgical Nursing Skills
- S.T.A.B.L.E.
- Telemetry Nursing Skills
- Total Parenteral Nutrition
- Transfer Techniques
- Triage Nursing Skills
- Trauma Nursing Skills
- Ventilator and Tracheotomy Care
- Wound & Skin Care

CONTINUOUS IMPROVEMENT

- Case Management/Discharge Planning
- Charge Nurse Training/Frontline Leadership Skills
- Communications Skills
- Conflict Resolution Skills
- CORE Measures

- Crisis Prevention Intervention
- Critical Thinking Skills
- Culturally Appropriate Care
- Customer Service Skills
- Documentation Skills
- Organization and Time Management Skills
- Patient and Family Centered Care Skills
- Preceptor Skills (train-the-trainer)
- Performance and Quality Improvement and Procedures Skills
- Team Building Skills
- Utilization Review
- Management of Assaultive Behavior

COMPUTER SKILLS

- Microsoft Office/Excel Skills (Intermediate and Advanced)
- MEDITECH
- Electronic Medical Records Application Skills
- Electronic Prescribing
- Patient Portal
- Community Scheduling
- Meaningful Use of Healthcare Data

Computer/Based Training

0-13

COMMERCIAL SKILLS

- Module 1&2: Cultural Diversity & Sensitivity, Team Work : Abuse, Exploitation & Pain Management (1hr)
- Module 3a: Emergency Medical Response; EMR and Module 3b: Protection Against Fire, Radiation, MRI and Hazardous Materials (1.5hr)
- Module 4: Risk Management, Prevention of Fall; Impaired Behavior; Patient who is likely to Commit Suicide, Reporting Incidents (.5hr)
- Module 5a: Infection Control for All Employees (1hr)
- Module 5b: Infection Control for Clinical Providers Only (1hr)
- Module 6a: Medication Administration for Licensed Nurses Only (2hr)
- Mosby Module for General Assessment (Pediatric) (2hr)
- Mosby Module for Stroke Assessment (1hr)
- Mosby Module for Pharmacy Technicians (1hr)
- Mosby Modules for Arterial Blood Sampling (.5hr)
- Mosby Modules for Capnometry & Capnography (.5hr)
- Mosby Modules for Ventilation: Noninvasive CPAP, BiPAP & NIMV (.5hr)

Note: Reimbursement for retraining is capped at 200 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per trainee.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Pyramid Berkeley Management L.P. dba Doubletree by Hilton Hotel Berkeley Marina

Agreement Number: ET17-0185

Panel Meeting of: August 26, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** L. Lai

PROJECT PROFILE

Contract Attributes:	Retrainee	Industry Sector(s):	Services Priority Industry: ☐ Yes ☒ No
Counties Served:	Alameda	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☒ Yes ☐ No UNITEHERE! Local 2850		
Number of Employees in:	CA: 928	U.S.: 9,200	Worldwide: 10,460
Turnover Rate:	12%		
Managers/Supervisors: (% of total trainees)	9%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$178,500		$0	$0		$178,500

In-Kind Contribution:	100% of Total ETP Funding Required	$183,450

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Computer Skills, Cont. Improv.	175	8-200	0-22	$1,020	$17.02
				Weighted Avg: 68			

Minimum Wage by County: $17.02 for Alameda County
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
$3.74 per hour in employer-paid health benefits may be used to meet the Post-Retention Wage. Additionally, up to $6.02 per hour in Mandatory Service Charges (banquet tips) may be used to meet the Post-Retention Wage for Food and Beverage Staff.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Housekeeping		55
Food & Beverage		66
Front Desk		11
Maintenance		14
Admin		14
Manager/Supervisor		15

*It will be made a condition of contract that these trainees will never be paid less than the State or local minimum wage rate at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

**$11.00 is the collective bargaining wage for 53 Food & Beverage Staff at the Doubletree Berkeley. The other 13 F&B Staff work at a non-union hotel.

INTRODUCTION

Pyramid Hotel Group was founded in 1999 and is headquartered in Boston, MA. It manages 71 hotels and 4 resorts throughout the continental United States, Hawaii, the Caribbean, Ireland and the United Kingdom. Pyramid Hotel Group is the employer of the two hotels participating in this proposal.

In this proposal, Pyramid Berkeley Management, L.P. dba Doubletree Hotel by Hilton Berkeley Marina (Pyramid Berkeley Management) will act as the lead employer and seeks funding to train employees at its hotel and its affiliate Pyramid Pleasanton Management L.P. dba Marriott Pleasanton. The hotels cater to tourists and business travelers. Each hotel has

conference/convention facilities with more than 25% of revenue attributed to out-of-state customers. As such, they qualify for standard retraining.

PROJECT DETAILS

In order to compete for business and attract first-time guests and repeat customers, the Company must improve guest experience by elevating its establishments from a 3-Diamond to a 4-Diamond rating. Hotels that demonstrate the basic requirements of cleanliness, comfort and hospitality during an unannounced inspection are designated as AAA/CAA Approved. AAA Diamond ratings for hotels represent a combination of the overall quality, range of facilities, and level of services offered by the property. The descriptive ratings are assigned exclusively to properties that meet and uphold AAA's rigorous Approval standards.

To meet the goal of a 4-diamond rating, the hotels are undergoing major renovations to rooms, lobbies, and restaurants at a cost in excess of $10 million. The Company also expects to spend an additional $250,000 in new technology and systems upgrades impacting the kitchens, restaurant layouts, menus, room service, banquet service and front desk.

In addition to the amenities upgrade, guest services and experiences must also be improved. The Company's goals are to increase Satisfaction and Loyalty Tracking (SALT) and Guest Experience Index (GEI) scores. ETP-funded training will help the hotels to reach their goals.

Training Plan

Class/Lab and CBT training will be provided. Training will be provided by internal trainers, management staff,

Business Skills (40%): This training will be provided to all occupations. Trainees will learn advanced sales techniques, negotiating skills, accounting skills and front desk skills. Training is intended to improve overall efficiency.

Computer Skills (15%): This training will be provided to all occupations. Trainees will learn to use new and upgraded systems for supply management, inventory controls, and reservation. New EMV (Europay, Mastercard, Visa) chip technology will be employed in the hotels also with new handheld Micros. Food & Beverage Staff will learn to use handheld tablets to take orders, allow customers to pay on the spot, and manage workflow.

Continuous Improvement (45%): This training will be provided to all occupations. Trainees will learn to exceed guest expectations in all areas of service, to work more efficiently in teams, to resolve conflicts, improve communications, and to think critically. Training will help team members solve guest problems and serve guests with more confidence.

Impact/Outcome

As a result of training, Maintenance Staff will receive 604 antifreeze certification. Food & Beverage Staff will receive training for Intervention Procedures; training for the responsible service, sale, and consumption of alcohol, and Serv-safe certifications.

Full-Time Work Week

Full-time employment for purposes of ETP retention means at least 35 hours a week for 90 consecutive days. The Panel may approve less than 35 hours a week if that workweek is customary for the industry or occupation.

Pyramid Berkeley Management requests a modification from 35 hours per week to 30 hours per week as it is considered full-time employment for front-line workers in the hospitality sector. These workers are not "temporary" but are employed by the two hotels on a permanent basis, with quarterly payroll reporting. Also, employees who work at least 30 hours per week are eligible for full-time health benefits. Because occupancy rates fluctuate during different months of the year, some workers' hourly status may also fluctuate. The Hotels offer a 30-hour full-time workweek for all employees which allow workers the ability to remain on full-time status even if their work hours drop to 30 hours per week. The Panel has approved this same modification in the past for other hotel training projects.

Union Support

United Here Local 3850, representing Housekeeping Staff, Food & Beverage Staff, Front Desk Staff, and Maintenance at DoubleTree Berkeley, has submitted a letter of support for the proposed training. Employees at Pleasanton Marriott are not represented by a union.

Commitment to Training

The current annual training budget is $42,000 for Berkeley and $24,000 for Pleasanton Marriott. Monies are used to provide new employee orientation, basic customer service, basic supervisor skills, basic computer skills, OHSA-mandated training, sexual harassment prevention training, and on-the-job training.

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

Each hotel will have a designated Human Resources Representative to coordinate the ETP-funded training and collect all training rosters. A third-party administrative subcontractor will be hired to assist in the initial scheduling of training, enrollment, tracking of hours and meeting with ETP staff for monitoring visits. Training will be delivered by internal training and management staff. External training vendors may be used if the need arises.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Pyramid Berkeley Management retained National Training Company in Middletown to assist with development of this proposal for a flat fee of $10,000.

ADMINISTRATIVE SERVICES

National Training Company will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting Skills
- Advanced Communication Skills
- Advanced Telephone Techniques
- Business Processes
- Confidentiality and Privacy of Client Data Procedures
- Customer Focused Selling
- Dealing With Difficult People
- Getting Results Through Accountability
- Integrated Kitchen Procedures
- Negotiating Skills
- New Menu Presentation and Selling Skills
- Operating Procedures
- Payroll Systems Skills
- PBX System Skills
- Point of Sale Skills
- Reducing Negativity in the Workplace
- Resolving Guest Complaints
- Room Standards Techniques
- Service Standards

COMPUTER SKILLS

- Computerized Inventory
- Customer Information Systems
- Delphi Sales and Catering Software
- Food Management Systems Software
- Inventory Software
- Micros Point of Sale
- MS Office (Intermediate and Advanced)
- Opera Operating System Front Desk Application
- Outlook (Intermediate and Advanced)
- Reservation Software Systems
- Sales Reports & Schedule Software
- Tablet Technology

CONTINUOUS IMPROVEMENT

- Critical Thinking
- Exceeding Guest Expectations
- Identifying/Meeting Guests Needs
- Improving Communication with Guests
- Leadership
- Quality Improvement
- Resolving Guest Complaints
- Resolving Team Conflicts
- Standard Work Procedures

- Team Building

CBT Hours
0 – 22

BUSINESS SKILLS

- CARE: A Commitment to Quality (30m)
- Courtesy Rules! Better Telephone Skills (30m)
- Crisis Communications (30m)
- Delegation (30m)
- Delivering Quality Service (30m)
- Enabling Independence: Service for Guests with Disabilities (60m)
- Exceptional Experience: Guest Privacy, Guest Relations, Guest Complaints, Telephone Experience (60m)
- Full Service Operations: At Your Service (30m)
- Guest Problem Solving – At Your Service Plus (30m)
- Improving Guest Interaction: Best Face Forward (30m)
- Making Diversity Work for You (30m)
- Managing Safety on Your Shift (30m)
- Priority Setting and Multi-Tasking in the Front Office (30m)
- Service Culture Training (120m)
- Front Desk
  - Accident Reports, Shift Paperwork, Safety, Security, Wrap-Up – (60m)
  - Guest Services, Check-Out and Settlement (60m)
  - Managing the Property and Your Shift (30m)
  - Overview and First Impressions (60m)
  - Reservations, Sales, Check-In (60m)
- Housekeeping
  - Cleaning the Sleeping Area, Cleaning the Bathroom, Wrap-Up (60m)
  - Quality Guestroom Cleaning (30m)
  - Safety and Security, Preparing to Clean, Entering Guestrooms (60m)
  - The Deep Cleaning Process (30m)
- Maintenance
  - Bathroom Repairs (30m)
  - Building and Grounds Maintenance (30m)
  - Equipment and Building Systems (30m)
  - Making Sure Hotel is Safe and Secure (30m)
  - Major Guestroom Repairs (30m)
  - Minor Guestroom Repairs (30m)
  - Norovirus: Facts and Prevention (15m)
  - Overview (30 mins)
  - Preparing for Assignments (15m)
  - Public Areas (30m)
  - Quality Guestroom Maintenance (30m)
  - Wrap-Up (15m)
  - Your Property (15m)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee.

UNITEHERE! Local 2850
East and North Bay's Union for hotel, foodservice, and gaming workers

December 31, 2015

Employment Training Panel
1100 J Street
4th Floor
Sacramento, CA 95814

Re: DoubleTree by Hilton Berkeley Marina. Employment Training Panel – Ref: 15-0597

The UNITE HERE Local 2850 supports the proposed Employment Training Panel (ETP) DoubleTree by Hilton Berkeley Marina project.

The Union understands that the ETP training program will provide various types of training to: Front Office, Guest Services, Housekeeping, Food & Beverage, Kitchen, and Maintenance staff.

Sincerely,

Wei-Ling Huber
President
UNITE HERE Local 2850
1440 Broadway, Ste. 208
Oakland, CA 94803

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Rocket EMS, Inc.

Agreement Number: ET17-0170

Panel Meeting of: August 26, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** R. Jackson

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Aerospace and Defense Technology/Other Priority Industry: ☒ Yes ☐ No
Counties Served:	Santa Clara	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 206	U.S.: 206	Worldwide: 206
Turnover Rate:	14%		
Managers/Supervisors: (% of total trainees)	20%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$143,370		$0	$0		$143,370

In-Kind Contribution:	100% of Total ETP Funding Required	$143,370

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr, Mfg Skills, Mgmt Skills	177	8-200	0	$810	$17.02
				Weighted Avg: 45			

It will be made a condition of contract that trainees will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: $17.02 for Santa Clara County.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $3.02 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Assembler		88
QC Inspector		13
Engineer		20
Manager		10
Administrative Staff		19
Customer Service Staff		15
Supervisor		11
IT Staff		1

INTRODUCTION

Established in 2011, Rocket EMS, Inc. (Rocket) (www.rocketems.com) is a large manufacturing business based in Santa Clara. Rocket develops and assembles custom-printed circuit board products to support clients in a variety of industries including: Defense, Aerospace, Medical and Commercial Electronics. Customers include Lockheed, General Dynamics, Intel, Clarity Medical, Kaiam, and Sentient.

PROJECT DETAILS

Training will support Rocket's Quality Management System (QMS) upgrades. These upgrades will assist Rocket in reaching goals to expand business in California, reduce risks (identified in Gap Analysis conducted in 2016), and improve its competitive position by reinforcing cross-training, quality assurance and skills upgrades. The focus of QMS is to monitor, measure and address training needs correlated to boost productivity. Rocket plans to increase revenue by

15% per year primarily by sustaining and growing ISO and IPC certification dependent customers and continuous improvement activities that shorten lead time and reduce errors.

All of the Company's products must conform to specific internal testing requirements driven in part by customer demands for ISO 2015, ISO9001, ISO13485, and IPC 610 certifications. These are standard certifications which help to control the quality of manufactured products. These certifications are highly regarded amongst supply chain decision-makers and quality professionals in the field. While Rocket is currently certified in ISO 9001 2008, obtaining these updated certifications will help the Company remain competitive to counter increasing pressures from offshore and out-of-state companies. The new ISO 9001:2015 standard includes Risk Mitigation, which will require more focus on process requirements.

Training Plan

Training will be delivered by in-house subject-matter experts and third party training vendors.

Manufacturing Skills (20%) – Training will be delivered to Assemblers, QC Inspectors, Supervisors and Managers. Training includes chemical manufacturing, design and engineering; equipment operations; and production skills. These skills are transferable within the industry and generally held to be skill upgrades for the workforce.

Continuous Improvement (35%) – Training will be offered to all occupations in an effort to develop efficiency through quality assurance initiatives. Staff will be able to make decisions and take immediate action, resulting in a greater attention to detail, error reduction, and a reduction in customer response time. ISO will also be provided to ensure quality standards are met for various customer and industry requirements.

Computer Skills (10%) - Training will be delivered to all occupations to improve processing of customer orders and maintain reliable administration. Updates to CAD/CAM and ERP systems require training updates for all occupations. IT staff will receive server and hardware configurations training.

Business Skills (15%) – Training will be delivered to Administrative Staff and Supervisors to enhance customer service. This will assist the company with new product introductions. Topics include leadership, marketing for growth, performance management, and customer service.

Management Training (20%) – Training will be delivered to Managers and Supervisors only. Topics include Plan Do Check Act, and 8D Problem-Solving Techniques. Training will provide skills to the management team to help the Company attain its growth and quality improvement goals.

Commitment to Training

Rocket represents that ETP funds will not displace the Company's existing financial commitment to training. The Company reports that it spent $108,000 for training for California employees in 2015. The Company provides substantial training resources to ensure employees have the basic technical and business skills to do their job. Ongoing training efforts also include Policy and Procedures training, on-the job training, product orientation, compliance training, safety training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Rocket retained Leonard Stephens in Hayward to assist with development of this proposal for a flat fee of $4,500.

ADMINISTRATIVE SERVICES

Rocket also retained Leonard Stephens to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

Leonard Stephens of Hayward has been retained to provide training for a fee of $60,000 to provide Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills, and Management Skills.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Strategies for Growth
- Customer Service Skills for Growth
  - Communications
  - Team Building
  - Negotiations
- Leadership for Growth
- Performance Management
- Sales & Marketing for Growth

COMPUTER SKILLS

- CAD/CAM (Computer-Aided Design/Computer-Aided Manufacturing)
- Enterprise Resource Planning (ERP)
  - Epicor
- Intermediate/Advanced Software Systems
  - Microsoft Applications
  - Proprietary Reporting & Support Systems
- Server & Hardware Configurations

CONTINUOUS IMPROVEMENT

- Continuous Improvement Techniques
  - Lean 5S
  - Six Sigma
  - Frontline Decision Making & Problem Solving
  - Root Cause Analysis
  - High Performance Workplace
- ISO 9001:2015

MANUFACTURING SKILLS

- Advanced Techniques for New Products, Industries, Clients & Processes
  - Automotive & Transportation
  - Chemical Manufacturing
  - Design & Engineering
  - Equipment Operations
  - Production Skills
- IPC 610
- Jstd-001 PCBA
- Qaulity Control

MANAGEMENT SKILLS (Managers and Supervisors only)

- 8D Problem Solving Techniques
- Plan Do Check Act
- Design & Engineering
- Equipment Operations
- Production Skills

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

SYSCO Ventura, Inc.

Agreement Number: ET17-0196

Panel Meeting of: August 26, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Paccerelli

PROJECT PROFILE

Contract Attributes:	Retrainee SET Veterans	Industry Sector(s):	Wholesale Trade Services Priority Industry: ☐ Yes ☒ No
Counties Served:	Ventura	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 305	U.S.: 305	Worldwide: 51,700
Turnover Rate:	6%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$123,390		$18,566 (15%)	$0		$104,824

In-Kind Contribution:	100% of Total ETP Funding Required	$154,280

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills; Computer Skills; Continuous Impr;	115	8-200	0	*$892	$28.37
				Weighted Avg: 70			
2	Retrainee SET Veterans	Business Skills; Computer Skills; Continuous Impr;	3	8-200	0	*$880	$15.60
				Weighted Avg: 40			

* Reflects Substantial Contribution

Minimum Wage by County: Job Number 1 (SET/Statewide): $28.37 per hour
Job Number 2 (Veterans): $15.60 per hour for Ventura County

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $4.94 per hour may be used to meet the Post-Retention Wage in Job Number 1.
Commission: Some Marketing Associates may also use commission sales of $4.37 per hour to meet the Post-Retention Wage.

The Company is not in Retail Trade. As such, occupations paid by commission do not fall under the "Panel's Lowest Priority" for FY 2016/17.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		10
Customer Service Staff		15
Lead Staff		10
Marketing Associate		45
Support Staff		20
Technical Staff		15
Job Number 2		
Marketing Associate		2
Technical Staff		1

INTRODUCTION

Located in Oxnard, SYSCO Ventura, Inc. (SYSCO Ventura) (www.sysco.com) warehouses, distributes and delivers more than 10,000 different food products, beverages, equipment and

supplies to restaurants, schools, assisted-living facilities, government facilities, and other businesses in Ventura County and adjacent areas.

As a wholly-owned subsidiary of Sysco Corporation, SYSCO Ventura has the advantage of a large corporation, such as expertise in computer systems, finance, distribution systems, and national account selling; and has an autonomous operation and enjoys the advantages of a small company, such as local control, and the ability to adjust local market conditions and opportunities.

Another subsidiary of the parent Sysco Corporation, Sysco Sacramento, Inc. is also seeking funding this month in the amount of $363,700 (ET17-0193). A third subsidiary, Sysco Central California, Inc. was funded last month for $200,750 (ET17-0160). Proposals from three other subsidiaries are pending for September 2016.

SYSCO Ventura does not face out-of-state competition and, therefore, is eligible for ETP funding under Special Employment Training provisions for frontline workers. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.

PROJECT DETAILS

This will be SYSCO Ventura's third ETP Agreement within the last five years. According to the Company, business at Sysco Ventura is continuing to mature. The Company is expanding market share and increasing sales; as such, it needs to improve the operating efficiency of its organization. New procedures and team building approaches are being company-wide to reduce errors and improve profitability. The goal is to work smarter and find ways to increase sales while improving operating margins.

SYSCO Ventura's customers are also asking for more flexibility in ordering products, tracking orders, and supporting the sales process. To improve customer services and reduce operating costs, the Company is implementing new software, SYSCO Market Express and Sysco Market Mobile, which is the focus of the proposed training.

In its prior ETP Agreements, ET12-0277 focused on the Company's Business Transformation Project, "Project 212" which carried over into the ET15-0101 project with the implementation of its integrated SAP software system. Although some course titles may be similar in the prior projects, SYSCO Ventura confirmed that there is no duplication of courses and the topics are updated and upgraded versions.

Training Plan

In-house subject matter experts will deliver training via class/lab in the following:

Continuous Improvement (30%): Training will be offered to all occupations to improve communication and meet customer orders and requests.

Business Skills (20%): Training will be offered to all occupations. Skills acquired will allow trainees to efficiently support customers and the sales force.

Computer Skills (50%): Training will be offered to all occupation and focus on the new systems, SYSCO Market Express and Sysco Market Mobile. Training also includes new computer technology and advanced/intermediate MS Office applications. These systems are currently not being used to its full potential.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. SYSCO Ventura currently employs Veterans as a part of their full-time workforce (Job Number 2). The Company plans to establish an outreach program to recruit potential Veteran Candidates.

Temporary to Permanent Hiring

SYSCO Ventura intends to train 10 workers (Job Number 1) under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis with the intention of hiring them into full-time, permanent positions after training. The average time for "converting" temporary workers into full-time permanent employment is six months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums 30 days upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, trainees are eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they will not be enrolled as trainees until after they have been hired into full-time, permanent employment. Until they are so hired, retention and post-retention wage requirements cannot be satisfied.

Substantial Contribution

SYSCO Ventura is a repeat contractor with payment earned in excess of $250,000 at the Oxnard facility within the past five years. (See Prior Project Table.) Accordingly, reimbursement for trainees will be reduced by 15% to reflect the Company's $18,566 Substantial Contribution to the cost of training.

Commitment to Training

SYSCO Ventura represents, that ETP funds will not displace the existing financial commitment to training. Its current training budget is $295,000 a year for new-hire orientation, OSHA mandated training, sexual harassment prevention, first aid and on-the-job training.

- Training Infrastructure

As a repeat contractor, SYSCO Ventura's management team is familiar with ETP recordkeeping requirements and remains committed to the successful execution and proper documentation of all ETP-funded training. In addition, the Company has retained an outside administrative consultant to ensure that all training records meet ETP compliance.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by SYSCO Ventura under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET15-0101	Oxnard	07/01/14-06/30/16	$225,000	$225,000 (100%)
ET12-0277	Oxnard	02/01/12-01/31/14	$249,600	$212,780 (85%)

DEVELOPMENT SERVICES

National Training Company in Irvine assisted with development for a flat fee of $5,000.

ADMINISTRATIVE SERVICES

National Training Company will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours
8–200

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- Coaching Skills
- Reducing Waste
- Resolving Customer Problems
- Shrinkage Reduction
- Sysco Food Safety
- Sysco Quality Standards
- Team Communication

COMPUTER SKILLS

- Exception Orders
- Microsoft Office (Intermediate and Advanced)
- MySysco Truck
- Production Applications
- Sales Cloud Computing
- Smartphone Applications
- Social Networking
- Sysco Market Express (Desktop)
- Sysco Market Mobile (Phone/Tablet)
- Tablet Applications
- Telogis Fleet Management

BUSINESS SKILLS

- Account Penetration
- Brand Conversion
- Category Management
- Equipment Diagnosis and Repair
- Handheld Barcode Scanner Computerized Glove
- Internet Marketing
- Marketing Campaigns
- Merchandising Skills
- Sysco Operating Procedures

Note: Reimbursement for retraining is capped at 200 total hours per-trainee, regardless of method of delivery.

RETRAINEE - JOB CREATION

Training Proposal for:

Total Transportation & Distribution, Inc.

Agreement Number: ET17-0204

Panel Meeting of: August 26, 2016

ETP Regional Office: North Hollywood **Analyst:** J. Romero

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Transportation/Logistics Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles and Riverside	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☐ No		
Number of Employees in:	CA: 103	U.S.: 103	Worldwide: 103
Turnover Rate:	15%		
Managers/Supervisors: (% of total trainees)	14%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$116,996		$0	$0		$116,996

In-Kind Contribution:	100% of Total ETP Funding Required	$120,936

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	94	8-200	0	$1,134	$16.48
				Weighted Avg: 63			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	20	8-200	0	$520	*$13.73
				Weighted Avg: 26			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job 1: $16.48 for Los Angeles County and $15.60 for Riverside County; Job 2: $13.73 for Los Angeles County and $12.77 for Riverside County.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

$1.82 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1		
Warehouse/Distribution		30
Driver		25
Customer Service		15
Administrative Staff		11
Supervisor/Manager		13
Total Job Number 1:		*94*
JOB NUMBER 2 (Job Creation)		
Warehouse/Distribution		4
Driver		5
Customer Service		5
Administrative Staff		3

Supervisor/Manager	$24.00 - $51.50	3
Total Job Number 2:		*20*
TOTAL (Job Numbers 1 & 2):		**114**

INTRODUCTION

Total Transportation & Distribution, Inc., (TTDI) is a transportation and third party logistics company headquartered in La Mirada, with an additional facility in Mira Loma. TTDI has provided premier integrated transportation and distribution solutions in and outside of California since 1989. The Company's services include Truck Load and Less Than Truck Load freight services and same day and next day delivery. The Company is eligible for standard retraining as a company that provides service in California that regularly competes with service providers located out-of-state.

Over the last three years, TTDI has expanded their workforce from 55 to 103 employees in their two facilities in La Mirada and Mira Loma and plans to add another 20 staff in the next 24 months to respond to their influx of business. TTDI's rapid growth is due to its growing market share, increased business and customer demand in the logistics industry.

This is TTDI's third ETP Agreement. The Company recently upgraded their warehouse management system from DaVinci to WISE software and trained employees on this new system in their prior ETP Agreement. For this proposal, TTDI plans to train employees in new transportation routing software (Dock Management System). The Company also invested in several upgrades to their legacy DaVinci software, which will be in concurrent use until the WISE software system is fully operational. These upgrades will allow the Company to fully integrate company processes in both the warehouse and transportation divisions using the latest technology in ordering, shipping, electronic data interchange (barcode hardware), and automation equipment. Training will be provided at both facilities in California.

PROJECT DETAILS

The Company's rapid growth underscores the need for continued training and system upgrades. TTDI continues to develop new ways to improve organizational infrastructure, and standard operating procedures. The skills, methods and best practices that employees will gain from this training is projected to improve performance as follows: Company processes by 15%, Customer service levels by 15% and Reduce downtime by 20%.

Retrainee - Job Creation

In support of job creation, the Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

TTDI has committed to hiring 20 new employees (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

TTDI's business growth has initiated the acquisition of new equipment, technology upgrades and an increase in manpower. The Company plans to hire three Administrative Staff, five Customer Service, four Warehouse/Distribution, five Drivers and three Managers/Supervisors to support the Company's continued growth. TTDI is actively recruiting to fill these new positions

and plans to provide extensive training to the newly-hired employees to get them to a level of efficiency upon their release to the line to perform their new job.

Training Plan

While the Company has provided training under prior ETP Agreements, more is needed for the new systems and upgrades described above. Training will be provided to all levels of operations and new personnel. The proposed training will provide employees with enhanced skills in process improvement, and professional and technical skills development.

Business Skills (20%): This training will be offered to all occupations. Training will focus on Communication Skills, Client Services, Sales Strategy and Time Management. Trainees will be given techniques in resolving complaints, identifying problems and proposing solutions that will exceed customer expectations. Customer satisfaction will translate to increased demand for TTDI services.

Commercial Skills (20%): This training will be offered to all occupations. Trainees will learn new procedures and processes in the new Transportation Routing System which is a full integration of company processes including ordering, shipping, electronic data interchange (EDI), barcode hardware and warehouse automation equipment. Training will prepare employees to be versatile and qualified to adapt to industry changes.

Computer Skills (50%): This training will be offered to all occupations. Trainees will learn to use and navigate the DMS and CLI software system. Training will also include the proper usage of software for maximum benefit.

Continuous Improvement (10%): This training will be offered to all occupations. Training will help reduce operation costs, enhance employee knowledge in business processes, and increase accuracy of work to attract more customers, grow the business and expand operations in California.

Commitment to Training

TTDI reserves an annual budget for mandatory training, employee orientation, OSHA training, sexual harassment prevention and first aid training. ETP funds will not displace the Company's existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

TTDI is ready to start training upon project approval. Training will be provided at TTDI's facility in La Mirada and Mira Loma by a combination of in-house staff and outside vendors.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by TTDI under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET15-0233	La Mirada	07/28/14 – 07/27/16	$99,580	$99,580 (100%)
ET13-0324	La Mirada	03/08/13-03/07/15	$49,400	$43,810 (89%)

DEVELOPMENT SERVICES

TTDI retained Training Funding Source (TFS) in Seal Beach to assist with development of this proposal for a flat fee of $6,900.

ADMINISTRATIVE SERVICES

TFS will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

BUSINESS SKILLS
- Communication
- Client Services
- Critical Thinking
- Inventory Control
- Sales Strategy
- Time Management

COMMERCIAL SKILLS
- Freight Shipping & Classification
- Order, Picking, Packing
- Quality Control
- Warehousing

COMPUTER SKILLS
- Cheetah
- Carrier Logistics Inc. ("CLI")
- Crystal Reports
- Dock Management Software (Transportation Routing System)
- DaVinci Software (Warehouse Management System)
- Microsoft Office - Advance

CONTINUOUS IMPROVEMENT
- Business process improvement
- Operations and Systems Analysis

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.

RETRAINEE - JOB CREATION

Training Proposal for:

AHMC San Gabriel Valley Medical Center LP

Agreement Number: ET17-0181

Panel Meeting of: August 26, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee SET Medical Skills Training Job Creation Initiative Priority Rate	Industry Sector(s):	Healthcare Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No California Nurses Association; Caregivers and Healthcare Employees Union		

Number of Employees in:	CA: 700	U.S.: 700	Worldwide: 700
Turnover Rate:	7%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$293,368		$105,084 50%	$0		$188,284

In-Kind Contribution:	100% of Total ETP Funding Required	$677,147

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Medical Skills Training Priority Rate	MS Preceptor, MS Didactic, Computer Skills, Continuous Imp.	417	8-200	0	*$252	$21.28
				Weighted Avg: 28			
2	SET Job Creation Initiative Medical Skills Training Priority Rate	MS Preceptor, MS Didactic, Computer Skills, Continuous Imp.	16	8-260	0	$5,200	$39.44
				Weighted Avg: 260			

*Reflects Substantial Contribution

Minimum Wage by County: Job Number 1: $21.28 per hour Statewide Average Hourly Wage (Priority Industry). Job Number 2: $13.73 per hour for Los Angeles County (Job Creation).
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $4.17 per hour may be used for Job Number 1 to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Registered Nurse		278
Licensed Vocational Nurse		27
Respiratory Care Practitioner		38
Certified Nurse Assistant		74
Job Number 2		
Registered Nurse (New Graduate)		16

INTRODUCTION

Founded in 1960, AHMC San Gabriel Valley Medical Center LP (San Gabriel or Hospital) is a full-service acute care hospital with 273 licensed beds. The Hospital (www.sgvmc.com) is fully accredited by the Joint Commission and is eligible for ETP funding under Special Employment Training (SET) for frontline workers.

The frontline workers targeted for this project are represented by two collective bargaining units: California Nurses Association and the Caregivers and Healthcare Employees Union. These unions have provided letters of support for the training of their respective members.

The Hospital offers Diagnostic Imaging, Emergency Services, Gastroenterology, Geriatric Behavioral Medicine Center, Newborn Intensive Care Unit, Orthopaedics & Spine Institute, Sexual Assault Response Team, Skilled Nursing and Sub-Acute Unit, Surgical Services, and a Women's Pavilion.

PROJECT DETAILS

San Gabriel's primary initiative for 2016 and 2017 is to further enhance the patient care experience. Therefore, the Hospital has identified the following programs and areas of emphasis that are driving the current need for training:

- Orthopaedic and Spine Institute Center – The Hospital is gearing up to become a certified Orthopaedic Joint Replacement Center that provides a competitive edge and is recognized by insurers and other third parties.

- Neonatal Resuscitation Program and Maternal Child Training – Neonatal resuscitation skills are essential for all heath care providers who are involved in the delivery of newborns. The transition from fetus to newborn requires intervention by a skilled individual and/or team in approximately 10% of all deliveries. Obstetrics training prepares nurses for low-volume and high-risk cases such as shoulder dystocia, prolapsed cord, postpartum hemorrhage, obstetric seizure, and crash cesarean section.

- New Equipment In-Service – In an effort to exceed minimum standards and provide exceptional patient care, the Hospital's continued investment in new technology/equipment includes recent upgrades in the areas of wireless computer access/utilization, geriatric behavioral medicine, nurse call system, monitoring equipment, and electronic medical records. Training is necessary to ensure that workers remain knowledgeable in the operation of equipment commonly used in the Post-Anesthesia Care Unit, Intensive Care Unit, Emergency Room, and Telemetry Unit.

- Sepsis Bundle – The Hospital has developed a Sepsis program to establish detection and treatment protocols. Training is necessary to ensure that hospital employees remain competent regarding this life-threatening condition that can result in death if treatment is not administered quickly.

- Electronic Medical Record (EMR) Utilization – Although the Hospital has converted to an electronic documentation systems, it must continue to provide training to staff on proper and effective utilization of the EMR system.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

With a shortage of experienced nurses in the community and greater service area, San Gabriel has committed to hiring and training 16 New Graduate RNs (Job Number 2) to maintain adequate staffing ratios and increase the Hospital's capacity to meet growing patient care requirements.

The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Training will take place at the Hospital's facility in San Gabriel and possibly at off-site vendor locations in California. Training will be delivered by in-house subject matter experts and training vendors to be identified during the contract term.

Medical Skills Training (55%)

The Panel has established a "blended" reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model. All trainees are expected to participate in Clinical Preceptor and Didactic training classes. This training will address deficiencies in specific skills to ensure that trainees are competent in advanced medical procedures. Additionally, Respiratory Care Practitioners and CNAs will receive medical skills training to ensure that trainees acquire the advanced skills to handle respiratory care, data analysis and reporting, patient assessment and care, transfer/mobility techniques, and infection control.

This blended rate, $22 per hour, will apply to both the Didactic and Preceptor modes of delivery. The standard class/lab rate for priority industries, $18 per hour, will apply to Computer Skills and Continuous Improvement training. (See Curriculum)

Computer Skills (20%) - Training will be offered to all occupations. Advanced training in EMR technology will help employees become more proficient at processing information, reviewing lab results, accessing reports, and tracking essential medical data.

Continuous Improvement (25%): Training will be offered to all occupations. These courses will focus on performance and quality of care improvements. Training will include frontline leadership skills, case management, communication skills, and critical thinking skills.

Justification for High Cost

Hospital representatives report that the 16 New Graduate RNs in Job Number 2 are scheduled to receive up to 480 hours of training to complete the full New Graduate Program. Therefore, the Hospital is asking for a maximum of 260 hours (weighted average 260) of training for New Graduate RNs. The Hospital will cover any remaining hours at the Hospital's expense.

SET/Wage Modification

Under SET, employers are not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period. However, trainees employed in a Priority Industry qualify for a wage modification up to 25% below the statewide average hourly wage. The Hospital is requesting the wage modification of $21.28 per hour for trainees in Job Number 1.

Substantial Contribution

San Gabriel is a repeat contractor with payment earned in excess of $250,000 and a former Substantial Contribution at the 30% level within the past five years. Reimbursement for trainees in Job Number 1 will be reduced by 50% to reflect the Hospital's $101,331 Substantial Contribution to the cost of training. The Substantial Contribution requirement does not apply to Retrainee – Job Creation trainees (Job Number 2).

Prior Projects

This will be San Gabriel's fourth ETP Agreement overall and the third within the past five years. (See Prior Projects Table) The Hospital indicates that the proposed training differs from and/or expands on training delivered in prior projects. New areas of training include process improvements involving evidence-based practices and protocols, EMR system upgrades, and enhanced patient satisfaction measures related to Affordable Care Act mandates.

The Hospital estimates that approximately 20% of the trainee population will be repeat program participants. Several topics in the Curriculum are repeated from prior agreements; however, the Hospital has confirmed that the subject matter has been updated and/or improved, so there will be no duplication of training in those courses.

San Gabriel is a wholly-owned subsidiary of AHMC Healthcare, Inc. (AHMC). It operates as a Limited Partnership, autonomous from other AHMC hospitals in the state. A different subsidiary, AHMC Whittier Hospital Medical Center LP is also seeking Panel approval this month.

Commitment to Training

San Gabriel spends an estimated $1.5 million annually on training. The Hospital's ongoing training includes new employee orientation, Annual Skills Day, sexual harassment prevention training, and management training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by San Gabriel under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0361	San Gabriel	04/28/14 – 04/27/16	$316,340	$260,078 (82%)
ET12-0337	San Gabriel	03/26/12 – 03/25/14	$190,900	$154,327 (81%)

DEVELOPMENT SERVICES

Training Funding Source in Seal Beach assisted with development for a flat fee of $9,500.

ADMINISTRATIVE SERVICES

Training Funding Source will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
Job Number 1: 8-200
Job Number 2: 8-260 Trainees may receive any of the following:

MEDICAL SKILLS TRAINING – DIDACTIC

- Acute Myocardial Infarction
- Advanced Cardiac Life Support (ACLS)
- Arterial Blood Gas (ABG) Interpretation
- Basic Life Support (BLS)
- Body Mechanics and Safe Patient Handling
- Care of the Cardiac Patient
- Care of the Orthopaedic Patient
- Care of Pediatric Patients (Acute Care, Intensive Care)
- Care of the Stroke Patient
- Central Lines Management
- Chest Tube Care & Management
- Code Blue Response & Procedures
- Critical Care Nursing Skills
- Decontamination Procedures
- Diabetes Care & Management
- Dysrhythmia Recognition & Interpretation
- Educating the Patient & Family
- EKG & Cardiac Monitoring
- Electronic Fetal Monitoring (Beginning & Advanced)
- Emergency Care of the Burn Patient
- Emergency Room Nursing Skills
- Equipment Skills (IV pumps, cardiac telemetry, vital signs, pulse-oximeter, ventilators, specialty beds and mattresses)
- Gastrointestinal Assessment and Management
- Infection Control
- Intravenous (IV) Insertion & Therapy
- Labor, Delivery and Postpartum Nursing Skills
- Medical/Surgical Nursing Skills
- Medication Administration & Management
- Moderate Sedation
- Neonatal Advanced Life Support (NALS)
- Neonatal Nursing Skills
- Neonatal Resuscitation Provider (NRP)
- Nurse Orientation Training (New Grads only)
- Ostomy & Continence Care
- Pain Management (Acute & Chronic)
- Patient Assessment & Care
- Patient Fall Prevention
- Pediatric Training
- PICC Line Insertion
- Pre and Post-Operative Care
- Rapid Response Skills
- Renal Assessment & Management

- Respiratory Assessment & Care
- Restraints
- Surgical Nursing Skills
- S.T.A.B.L.E.
- Telemetry Nursing Skills
- Total Parenteral Nutrition (TPN)
- Transfer Techniques
- Triage Nursing Skills
- Ventilator and Tracheotomy Care
- New Graduate Program Skills
- Wound & Skin Care
- Defibrillator Training

MEDICAL SKILLS TRAINING – CLINICAL PRECEPTOR

- **Emergency Department Training**
  - Emergency Room Nursing Skills
  - Emergency Care of the Burn Patient
  - OB Trauma
  - Trauma Nursing Skills
  - Triage Nursing Skills
  - Care of Pediatric patients

- **Intensive Care Unit/Critical Care Unit Training**
  - Critical Care Nursing Skills
  - Patient Assessment & Care
  - Pre and Post-Operative Care
  - Ventilator & Tracheotomy Care
  - Hemodynamics Training

- **Long Term Care Unit** (Subacute, Skilled Nursing, Transitional Care & Hospice)
  - Patient Assessment & Care
  - Geriatric Nursing Skills
  - Med/Surg Nursing Skills
  - Hospice Nursing Skills

- **Medical/Surgical Unit Training**
  - Patient Assessment & Care
  - Medical/Surgical Nursing Skills
  - Pre and Post-Operative Care

- **Obstetrics Unit Training**
  - Patient Assessment & Care
  - Antepartum, Labor, Delivery and Postpartum Skills
  - Neonatal Nursing Skills
  - S.T.A.B.L.E.
  - Advanced & Electronic Fetal Monitoring
  - Neonatal Resuscitation Provider (NRP)

- **Operating Room and Post-Anesthesia Care Unit (PACU) Training**
  - Patient Assessment & Care

- Care of the Burn Patient
- Peri-operative Nursing Skills
- Pre and Post-Operative Care

- **Pediatric Services Unit**
  - Care of Pediatric Patients (Acute Care, Intensive Care)
  - Patient Assessment & Care
  - Pre & Post-Operative Care

- **Surgical Services Unit Training**
  - Patient Assessment & Care
  - Surgical Nursing Skills
  - Pre and Post-Operative Care

- **Telemetry Unit Training**
  - Care of the Cardiac Patient
  - EKG & Cardiac Monitoring
  - Dysrhythmia Interpretation
  - Telemetry Nursing Skills
  - Pre and Post-Operative Care
  - Intravenous (IV) Therapy

CONTINUOUS IMPROVEMENT

- Case Management/Discharge Planning
- Charge Nurse Training/Frontline Leadership Skills
- Communications Skills
- Conflict Resolution Skills
- CORE Measures
- Crisis Prevention Intervention (CPI)
- Critical Thinking Skills
- Culturally Appropriate Care
- Patient Satisfaction (HCAPHS) Training
- Value Based Purchasing
- Documentation Skills
- Organization and Time Management Skills
- Patient and Family Centered Care Skills
- Preceptor Skills (train-the-trainer)
- Performance and Quality Improvement and Procedures Skills
- Team Building Skills
- Utilization Review
- ED Assaultive Training
- Meaningful Use

COMPUTER SKILLS

- Electronic Medical Records Application Skills
- Computer Physician Order Entry (CPOE)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee for Job Number 1 and 260 total training hours per trainee for Job Number 2 (New Graduate RN trainees), regardless of the method of delivery.

CALIFORNIA NURSES ASSOCIATION
National Nurses United
A Voice for Nurses. A Vision for Healthcare.

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225 West Broadway
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June 21, 2016

Executive Director
The Employment Training Panel
1100 J Street
Fourth floor
Sacramento, CA 95810

This letter is to confirm supported by the California Nurses Association for San Gabriel Valley Medical Center proposed training to be submitted to employment training panel. We agree with and support the efforts by the hospital management to provide ongoing education and training to our members/hospital employees in order to better serve our patients and the community.

If you have any questions, please don't hesitate to call me at 818-521-0208.

Sincerely

Dinorah Williams
CNA Labor Representative

Caregivers and Healthcare Employees Union

June 21, 2016

Executive Director
The Employment Training Panel
1100 J Street
Fourth floor
Sacramento, CA 95810

This letter is to confirm supported by caregivers and healthcare employees union CHEU for San Gabriel Valley medical Center proposed training to be submitted to employment training panel.

If you have any questions, please don't hesitate to call me at 181-521-0208

Sincerely

Michelle Reyna
CHEU/CNA Labor Representative

225 W. Broadway, Suite 500 ▪ Glendale, California 91204 ▪ Phone: 818-240-1900 ▪ Fax: 818-240-8336

Caregivers and Healthcare Employees Union

June 21, 2016

Executive Director
The Employment Training Panel
1100 J Street
Fourth floor
Sacramento, CA 95810

This letter is to confirm supported by caregivers and healthcare employees union CHEU for San Gabriel Valley medical Center proposed training to be submitted to employment training panel.

If you have any questions, please don't hesitate to call me at 181-521-0208

Sincerely

Michelle Reyna
CHEU/CNA Labor Representative

225 W. Broadway, Suite 500 ▪ Glendale, California 91204 ▪ Phone: 818-240-1900 ▪ Fax: 818-240-8336

RETRAINEE - JOB CREATION

Training Proposal for:

AHMC Whittier Hospital Medical Center LP

Agreement Number: ET17-0180

Panel Meeting of: August 26, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee SET Medical Skills Training Job Creation Initiative Priority Rate	Industry Sector(s):	Healthcare Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No California Nurses Association		

Number of Employees in:	CA: 567	U.S.: 567	Worldwide: 567
Turnover Rate:	12%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$708,948		$287,424 (50% Job 1)	$0		$421,524

In-Kind Contribution:	100% of Total ETP Funding Required	$1,357,746

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Medical Skills Training Priority Rate	MS Preceptor, MS Didactic, Commercial Skills, Computer Skills, Continuous Imp.	499	8-200	0-8	*$576	$21.28
				Weighted Avg: 64			
2	Retrainee SET Job Creation Initiative Medical Skills Training Priority Rate	MS Preceptor, MS Didactic, Commercial Skills, Computer Skills, Continuous Imp.	45	8-200	0-8	$2,980	**$13.73
				Weighted Avg: 149			

*Reflects Substantial Contribution

**It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Number 1 (SET/Priority Industry): $21.28 per hour
Job Number 2 (Job Creation): $13.73 per hour for Los Angeles County

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $4.17 per hour for Job Number 1 and $1.42 per hour for Job Number 2 may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Registered Nurse		244
Licensed Vocational Nurse		30
Pharmacist		7
Technician		117
Ancillary Support Staff		90
Administrative Staff		11
Job Number 2		
Registered Nurse (Experienced and New Grad)		30
Licensed Vocational Nurse		2
Pharmacist		2

Technician		8
Ancillary Support Staff		2
Administrative Staff		1

INTRODUCTION

Founded in 1957, AHMC Whittier Hospital Medical Center LP (Whittier Hospital) is a full service acute care facility with 178 licensed beds. The Hospital (www.whittierhospital.com) is accredited by The Joint Commission and is eligible for ETP funding under Special Employment Training (SET) for frontline workers. Whittier Hospital has provided a letter of support from the California Nurses Association, which represents the Registered Nurses in this proposal.

The Hospital's core services include emergency, critical care, general surgery, telemetry, medical/surgical, pediatric subacute, obstetric care, nursery, laboratory, outpatient services, rehabilitation services, and radiology. Whittier Hospital also offers community outreach programs in wellness, diabetes awareness, and stroke awareness.

Whittier Hospital has identified the following changes in programs and services that are driving the current need for training:

- Perinatal Best Practices – Whittier Hospital has a robust perinatal service line that delivers between 200-350 babies per month. Training emphasis in this area will focus on the following: Perinatal Postpartum Depression (early identification, interventions, and resources; reduction of Early Elective Deliveries (deliveries between 37-39 weeks); initiative to increase the rate of Exclusive Breastfeeding; safe reduction of Cesarean Sections in primary deliveries; and Maternal Hemorrhage/Severe Maternal Morbidity (staff education on assessment, intervention, and prevention).

- Infection Prevention – The Hospital is revamping its infection prevention initiatives and making significant changes to its infection control practices. Areas of needed training and education include: best practices to reduce MSRA/"Superbug" hospital-acquired cases; reduction of hospital-acquired cases of C Difficile infections; best practices for the reduction of Central Line-Associated Blood Stream Infections; reduction of Catheter-Associated Urinary Tract Infections; and best practices regarding Endoscope and Bronchoscope Reprocessing.

- 2016 National Patient Safety Goals – The Hospital has updated its continuous improvement initiatives and adopted new Joint Commission recommendations that focus on healthcare safety. Training and improvement topics include: Accurate Patient Identification, Staff Communication, Medical Safety, Alarm Safety, Suicide Prevention and Prevention of Surgical Errors.

- Emergency Department/Lean Program – Whittier Hospital has seen the largest percentage increase of patients come through its Emergency Department. As a result, the Hospital has introduced a Lean Program designed to improve workplace efficiency. This program was launched in the Emergency Department, but will soon be expanded to the Perioperative Department, Inpatient Discharge processes, and other areas throughout the Hospital. This Lean Program will be phased in over time and requires training for all staff on Lean principles and process improvements.

- Electronic Medical Record Conversion/Meaningful Use – Whittier Hospital is continuing its effort to convert from paper to computer charting. The Hospital has successfully completed Stage 2 conversion of the Meaningful Use initiative and is currently preparing for the next phase. The Hospital anticipates the coming years will require additional staff training to ensure compliance with various electronic medical record initiatives including: successful implementation of house-wide computerized physician order entry; achieving and maintaining 60% of medications ordered electronically; education and implementation of electronic prescriptions; and the stretch goal of 100% paperless within the next two years.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

Whittier Hospital has committed to hiring 45 new employees including 30 RNs under Job Number 2. These employees are needed to maintain adequate staffing ratios and to support the Hospital's expanding patient care departments/programs, such as Emergency, Perinatal and Perioperative.

The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

PROJECT DETAILS

The proposed training will take place at the Hospital's facility in Whittier and possibly at off-site vendor locations in California. Training will be delivered by in-house subject matter experts and training vendors to be identified during the contract term. The majority of training will be delivered via class/lab; however, some training will be conducted via computer-based training (CBT) as an added learning tool for specific topics.

Training Plan

Medical Skills Training (45%): The Panel has established a "blended" reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model. Approximately 274 RNs and 32 LVNs will participate in Clinical Preceptor and Didactic training classes. This training will address deficiencies in specific skills to ensure that trainees are competent in advanced medical procedures. Some Technicians may receive limited medical skills training based on their respective job duties.

This blended rate, $22 per hour, will apply to both the Didactic and Preceptor modes of delivery. The standard class/lab rate for priority industries, $18 per hour, will apply to Computer Skills and Continuous Improvement training. The CBT rate, $8 per hour, will apply to CBT Commercial Skills. (See Curriculum)

Computer Skills (30%): Training will be offered to all occupations. Training will cover various healthcare software solutions including electronic medical records, medication management and data analysis tools.

Continuous Improvement (20%): Training will be offered to all occupations. These courses will focus on performance and quality of care improvements. Training will include

communication skills, time management, frontline leadership skills, time management, conflict resolution and case management.

Commercial Skills (5%): Training will be offered to all occupations. These CBT topics will include industry-specific skills such as medication safety and blood handling education.

SET/Wage Modification

Under SET, employers are not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period. However, trainees employed in a Priority Industry qualify for a wage modification up to 25% below the statewide average hourly wage. The Hospital is requesting the wage modification of $21.28 per hour for trainees in Job Number 1.

Substantial Contribution

Whittier Hospital is a repeat contractor with payment earned in excess of $250,000 and a former Substantial Contribution at the 30% level within the past five years. Reimbursement for trainees in Job Number 1 will be reduced by 50% to reflect the Hospital's $287,424 Substantial Contribution to the cost of training. The Substantial Contribution requirement does not apply to Retrainee – Job Creation trainees (Job Number 2).

Prior Projects

This will be Whittier Hospital's fifth ETP Agreement overall and the fourth within the past five years (See Prior Projects Table). The Hospital indicates that the proposed training differs from and/or expands on training delivered in the past. The training for this project features several new initiatives: Lean Program, Perinatal Improvements, Infection Prevention, and related patient care changes that will help the Hospital improve its services.

This proposal includes employees who may have participated in a previous contract. Several Curriculum topics are repeated from prior agreements; however, the Hospital has confirmed that the subject matter has been updated and/or changed, so there will be no duplication of training.

Whittier Hospital is a wholly-owned subsidiary of AHMC Healthcare, Inc. It operates as a Limited Partnership autonomous from other AHMC hospitals in the state. A different subsidiary, AHMC San Gabriel Valley Medical Center LP is also seeking Panel approval this month.

Commitment to Training

Whittier Hospital estimates that it will spend approximately $1.6 million on training during 2016. The Hospital's ongoing training includes new employee orientation, Annual Skills Day, management training, life support certification and recertification, and in-service training to disseminate new information. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Whittier Hospital under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0362	Whittier	04/28/14 – 04/27/16	$348,263	$348,263 (100%)
ET12-0338	Whittier	03/26/12 – 03/25/14	$197,892	$177,385 (90%)
ET10-0188	Whittier	09/28/09 – 09/27/11	$249,336	$244,136 (98%)

DEVELOPMENT SERVICES

Training Funding Source in Seal Beach assisted with development for a flat fee of $9,500.

ADMINISTRATIVE SERVICES

Training Funding Source will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 200

Trainees may receive any of the following:

MEDICAL SKILLS TRAINING – DIDACTIC

- Acute Myocardial Infarction
- Advanced Cardiac Life Support
- Arterial Blood Gas Interpretation
- Basic Life Support
- Body Mechanics and Safe Patient Handling
- Care of the Cardiac Patient
- Care of Pediatric Patients (Acute Care, Intensive Care)
- Care of the Pre-Eclamptic/Eclampsia Patient (Perinatal)
- Care of the Stroke Patient
- Central Lines Management
- Chest Tube Care & Management
- Code Blue Response & Procedures
- Critical Care Nursing Skills
- Decontamination Procedures
- Diabetes Care & Management
- Dysrhythmia Recognition & Interpretation
- Educating the Patient & Family
- EKG & Cardiac Monitoring
- Electronic Fetal Monitoring (Beginning & Advanced)
- Emergency Care of the Burn Patient
- Emergency Room Nursing Skills
- Equipment Skills (IV pumps, cardiac telemetry, vital signs, pulse-oximeter, ventilators, specialty beds and mattresses, PCA Pumps, etc.)
- Gastrointestinal Assessment and Management
- Infection Control
- Intravenous Insertion & Therapy
- Labor, Delivery and Postpartum Nursing Skills
- Medical/Surgical Nursing Skills
- Medication Administration & Management
- Moderate Sedation
- Neonatal Advanced Life Support
- Neonatal Nursing Skills
- Neonatal Resuscitation Provider
- Nurse Orientation Training (New Grads only)
- Ostomy & Continence Care
- Pain Management (Acute & Chronic)
- Patient Assessment & Care
- Patient Fall Prevention
- Pediatric Advanced Life Support
- PICC Line Insertion
- Pharmacology Updates and Medication Management
- Pre and Post-Operative Care
- Rapid Response Skills
- Renal Assessment & Management
- Respiratory Assessment & Care

- Restraints
- Surgical Nursing Skills
- S.T.A.B.L.E.
- Telemetry Nursing Skills
- Total Parenteral Nutrition
- Transfer Techniques
- Triage Nursing Skills
- Ventilator and Tracheotomy Care
- New Graduate Program Skills
- Wound & Skin Care
- Defibrillator Training

MEDICAL SKILLS TRAINING – CLINICAL PRECEPTOR

- **Emergency Department Training**
  - Emergency Room Nursing Skills
  - Emergency Care of the Burn Patient
  - OB Trauma
  - Trauma Nursing Skills
  - Triage Nursing Skills
  - Care of Pediatric Patients

- **Intensive Care Unit/Critical Care Unit Training**
  - Critical Care Nursing Skills
  - Patient Assessment & Care
  - Pre and Post-Operative Care
  - Ventilator & Tracheotomy Care
  - Hemodynamics Training

- **Long Term Care Unit** (Subacute, Skilled Nursing, Transitional Care & Hospice)
  - Patient Assessment & Care
  - Geriatric Nursing Skills
  - Med/Surg Nursing Skills
  - Hospice Nursing Skills

- **Medical/Surgical Unit Training**
  - Patient Assessment & Care
  - Medical/Surgical Nursing Skills
  - Pre and Post-Operative Care

- **Obstetrics Unit Training**
  - Patient Assessment & Care
  - Antepartum, Labor, Delivery and Postpartum Skills
  - Neonatal Nursing Skills
  - S.T.A.B.L.E.
  - Advanced & Electronic Fetal Monitoring
  - Neonatal Resuscitation Provider

- **Operating Room and Post-Anesthesia Care Unit Training**
  - Patient Assessment & Care
  - Care of the Burn Patient
  - Peri-Operative Nursing Skills
  - Pre and Post-Operative Care

- **Pediatric Services Unit**
  - Care of Pediatric Patients (Acute Care, Intensive Care)
  - Patient Assessment & Care
  - Pre & Post-Operative Care

- **Surgical Services Unit Training**
  - Patient Assessment & Care
  - Surgical Nursing Skills
  - Pre and Post-Operative Care

- **Telemetry Unit Training**
  - Care of the Cardiac Patient
  - EKG & Cardiac Monitoring
  - Dysrhythmia Interpretation
  - Telemetry Nursing Skills
  - Pre and Post-Operative Care
  - Intravenous Therapy

COMPUTER SKILLS

- Electronic Medical Records Application Skills
- Medication Reconciliation & Electronic Prescribing Skills
- Data Information Population and Exchange via Interfaces—Required Data
- PhysDoc Software Electronic Documentation Skills
- Data Analysis and Reporting Writing Skills
- Electronic File Management & Scanning Skills
- Computer Physician Order Entry Skills
- E.H.R. Patient Portal Skills
- Creating Charts, Graphs, and Pivot Tables for Data Display

CONTINUOUS IMPROVEMENT

- Case Management/Discharge Planning
- Charge Nurse Training/Frontline Leadership Skills
- Communications Skills
- Conflict Resolution Skills
- CORE Measures
- Crisis Prevention Intervention
- Critical Thinking Skills
- Culturally Appropriate Care
- Patient Satisfaction (HCAPHS) Training
- Value Based Purchasing
- Documentation Skills
- Organization and Time Management Skills

- Patient and Family Centered Care Skills
- Preceptor Skills (train-the-trainer)
- Performance and Quality Improvement and Procedures Skills
- Team Building Skills
- Utilization Review
- ED Assaultive Training
- Meaningful Use

CBT Hours
0 – 8

COMMERCIAL SKILLS

- Slips and Trips: Fall Risk Identification and Prevention (1.5 hours)
- What's New with Medication Safety (1.5 hours)
- Alarm Fatigue for Clinical Nurses (1.5 hours)
- Blood Transfusion Safety and Blood Products Overview (1.5 hours)
- Communication for Nurses (1.5 hours)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee.

CALIFORNIA NURSES ASSOCIATION
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May 24, 2016

Mr. Stewart Knox
Executive Director
The Employment Training Panel
1100 J Street
Sacramento, California 95814

Re: Union Support for ETP Funding

Dr. Mr. Knox:

This is letter is to confirm support of California Nurses Association for Whittier Hospital Medical Center proposed training to be submitted to the Employment Training Panel.

Sincerely,

Erik Macatuno

Erik Macatuno
CNA Labor Representative
California Nurses Association-National Nurses United

RETRAINEE - JOB CREATION

Training Proposal for:

C.R. England, Inc.

Agreement Number: ET17-0188

Panel Meeting of: August 26, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee SET Job Creation Initiative Veterans Priority Rate	Industry Sector(s):	Transportation/Logistics Priority Industry: ☒ Yes ☐ No
Counties Served:	San Bernardino	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 1,850	U.S.: 8,200	Worldwide: 8,200
Turnover Rate:	18%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$406,200		$0	$0		$406,200

In-Kind Contribution:	100% of Total ETP Funding Required	$752,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Commercial Skills, PL - Comm'l Skills	200	8-200	0-100	$792	$21.28
				Weighted Avg: 44			
2	Retrainee SET Job Creation Initiative Priority Rate	Commercial Skills, PL - Comm'l Skills	155	8-200	0-100	$1,400	*$13.00
				Weighted Avg: 70			
3	Retrainee SET Job Creation Initiative Veterans Priority Rate	Commercial Skills, PL - Comm'l Skills	20	8-200	0-100	$1,540	*$13.00
				Weighted Avg: 70			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Number 1 (SET/Priority Industry): $21.28 per hour Job Numbers 2 and 3 (Job Creation): $12.77 per hour for San Bernardino County.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $2.28 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Driver		175
Frontline Driver Manager		25
Job Numbers 2 and 3 (Job Creation)		
Driver		160
Frontline Driver Manager		15

INTRODUCTION

C.R. England, Inc. (CRE) (www.crengland.com) is a family-owned trucking company that specializes in temperature-controlled transportation services. CRE was founded in 1920 and is headquartered in Salt Lake City, Utah. CRE's range of customers includes clients in the food, pharmaceutical, and LTL (Less-Than-Truckload) line haul industries. CRE serves the needs of

its customers through five service dimensions: National, Mexico, Regional, Dedicated (tailor-made services dedicating trucks and drivers to specific customer needs) and Intermodal (expedited priority rail service using TempStack refrigerated containers). CRE is a 2015 recipient of the Environmental Protection Agency's Smartway Freight Carrier Excellence Award as an industry leader in freight supply chain environmental performance and energy efficiency.

This project will utilize Special Employment Training (SET) funds for the retraining of frontline workers. The proposed training will take place at the Company's California facilities in Colton and Fontana.

Reportedly, the trucking industry is the driving force behind the movement of nearly 70% of the freight shipped in the United States, with industry experts expecting the number of carrier truckloads to increase in 2016. This increase in demand comes at a time when the industry is facing a nationwide driver shortage. Consequently, CRE is experiencing a shortage of qualified drivers and must improve its recruitment and retention of drivers through extensive, high-quality training.

PROJECT DETAILS

CRE's training is designed to enable drivers to excel at their jobs, as well as take advantage of the opportunity to transition into office positions or become Driver Managers. CRE also provides Drivers with the opportunity to become part of the Company's learning and development team as trainers in National, Regional or Dedicated divisions.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

CRE is currently ramping up its hiring in response to business demands and the ongoing shortage of skilled drivers. The Company has already hired approximately 250 new drivers in 2016. In this proposal, CRE has committed to hiring an additional 175 employees to support the Company's effort to increase its driver workforce and expand its business capacity. One example of expansion involves CRE's plan to add a fuel island at the Fontana facility. The Company is currently undergoing the approval process with the City of Fontana, and this facility upgrade alone is expected to create 10 new jobs, with a capital expenditure of approximately $5 million.

The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Veterans Program

CRE conservatively plans to hire 20 Veterans (Job Number 3) who have served on active full-time duty in the Armed Forces. The Panel has established a higher reimbursement rate and other incentives for training California veterans, as will be reflected in the contract.

Training Plan

Training will allow CRE to upgrade the skills of its existing workforce and equip new employees with the skills to provide safe, reliable transportation services. All training will be in Commercial Skills. The majority of training will be Productive Lab. Training will be supplemented with

computer-based training (CBT) to enhance Driver skills acquired behind the wheel. CBT will be capped at 50% of total training hours per trainee. Training will be delivered by experienced CRE drivers and other members of the Company's Learning and Development team.

Commercial Skills (100%) – In addition to Productive Lab (PL) and CBT training, workers will be given the opportunity to become driver trainers through CRE's Train-the-Trainer program. This program is comprised of classroom training for drivers who successfully complete the Phase 1 and Phase 2 Productive Lab training modules and wish to become instructors for these courses.

Productive Laboratory

Trainees may produce goods for profit as part of the PL training in the courses identified in the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

CRE's drivers must undergo 160-180 hours of extensive and specialized PL training (Phase 1 and Phase 2), delivered at a significant expense, to ensure compliance with the Company's driving and safety standards. Although these Drivers will have already completed driving school and received all relevant certification prior to employment, CRE's goal is to have the highest skilled drivers on the road. CRE is seeking ETP funding for up to 60 hours of PL training per trainee. This company-specific training will allow Drivers to gain essential experience in a supportive environment under the guidance of skilled instructors.

Drivers will receive training on various models of trucks within CRE's fleet of transportation vehicles. The trainer-to-trainee ratio will be 1:1, and training will be capped at 60 hours per trainee.

Frontline Workers

Driver Managers actively manage teams and resources, provide training, and spend more than 50% of their time performing frontline work. These individuals may function in a supervisory or lead capacity; however, they do not hire, fire, or make company policy. Based on the nature and scope of their job duties, these trainees meet the Panel's definition of frontline workers. As frontline workers, these trainees qualify for Special Employment Training (SET) funding.

SET/Wage Modification

Under SET, employers are not required to demonstrate out-of-state competition. To qualify, trainees must be earning at least the statewide average hourly wage at the end of the retention period. However, trainees employed in a Priority Industry qualify for a wage modification up to 25% below the statewide average hourly wage. CRE is requesting the wage modification of $21.28 per hour for trainees in Job Number 1.

Electronic Recordkeeping

ETP staff has reviewed and approved the use of a Learning Management System for recordkeeping.

Commitment to Training

The Company spends approximately $75,000 annually on training in California. Company-funded training has consisted of regulatory training mandated by state and federal agencies, extensive on-the-job training, business etiquette, cost accounting and leadership skills. Safety

training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  CRE has a dedicated Learning and Development team of three professionals to oversee the scheduling of training, documentation and system tracking. Personnel from additional departments, including Tax and Human Resources, will provide oversight and coordination during the contract term. The Company has established a structured training plan to help ensure success.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Deloitte Tax LLP in San Francisco assisted with development for a flat fee of $40,000.

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

COMMERCIAL SKILLS

- **Train-the-Trainer (Driver Training)**
  - Theory of Training/How Adults Learn
  - Training Methods and Styles
  - Developing Effective Communication
  - Dealing with Challenging Situations

Productive Lab

0 - 60

COMMERCIAL SKILLS (Ratio 1:1)

- **Phase 1 Training**
  - Turning
  - Railway Crossing and Intersections
  - City and Highway Traffic
  - Backing up the Tractor-Trailer
  - Couple and Uncouple the Tractor-Trailer
  - Equipment Inspection and Maintenance
  - Brake Inspection and Testing
  - Navigating Roads
  - Weather Conditions
  - Safety Concepts

- **Phase 2 Training**
  - Advanced Training on Specialized Skills including Backing, Maneuvers, Turns, Safety Concepts, Navigating Roads and Expressways

Safety Training cannot exceed 10% of total training hours per-trainee.

CBT Hours

0 – 100

COMMERCIAL SKILLS

- Aerial Lifts in Industrial and Construction Environments (1 hour)
- Back Safety: Keep Your Back in Action (1 hour)
- Backing: Tractor-Trailers (.75 hour)
- Basic Controls Retraining (.75 hour)
- Basic Controls Retraining (Upgrade Instructor) (.5 hour)
- Business Coaching: Conducting Coaching Sessions (1 hour)
- Business Coaching: Using Different Coaching Styles (1 hour)
- Business Writing: How to Write Clearly and Concisely (1 hour)
- Compressed Gas Cylinders (1 hour)
- Confined Spaces: Dangerous Places (1 hour)
- Crane Safety (1 hour)
- Cranes, Derricks, Hoists, Elevators, and Conveyors for Construction (1 hour)
- Creating and Maintaining a Positive Work Environment (1 hour)

- Customer Service Confrontation and Conflict (1 hour)
- Customer Service Fundamentals: Building Rapport in Customer Relationships (1 hour)
- Dealing with Difficult Situations (.75 hour)
- Dealing with Hazardous Spills (1 hour)
- Decision Making: The Fundamentals (1 hour)
- Defensive Driving: Light Vehicles (.75 hour)
- Distracted! Driving (.75 hour)
- Driving Safety (.75 hour)
- Effective Communication for Employees (1 hour)
- Effective Communication for Supervisors (1 hour)
- Electrical Safety: Know Your Ground (.75 hour)
- Emergency Planning (.75 hour)
- Export Controls Essentials (.75 hour)
- EYE ON Defensive Driving (1 hour)
- EYE ON Speed & Space Management (.75 hour)
- Fire Prevention & Response (.75 hour)
- First Steps for Turning Around a Performance Problem (1 hour)
- First Time Manager: Understanding a Manager's Role (1 hour)
- Flatbed Cargo Securement (1 hour)
- Flex TTT (Train-the-Trainer) (2 hours)
- Flex TTT + Upgrade (Train-the-Trainer) (1 hour)
- Forklift Operator Safety Training (1 hour)
- Forklift Safety for Construction (1 hour)
- Forklift Workshop for Construction: Operator Safety Training (1 hour)
- Forklifts: Ultimate Hazard Perception Challenge - Advanced Safety Awareness (.5 hour)
- Forklifts: Ultimate Hazard Perception Challenge: Basic Safety Awareness (.5 hour)
- Forklifts: Ultimate Hazard Perception Challenge: Intermediate Safety Awareness (.5 hour)
- Hand & Power Tools: Construction (.75 hour)
- Hand and Power Tool Safety (.75 hour)
- Handling Compressed Gas Cylinders in the Laboratory (.75 hour)
- Handling Hazardous Materials (.75 hour)
- Hazardous Materials Labels (.75 hour)
- HAZMAT In-Depth Security Training (.75 hour)
- Hazmat Security Awareness (1 hour)
- Hazmat Transportation: Driver Training (1 hour)
- Injury Prevention for Drivers (.75 hour)
- Internal Controls Essentials (.75 hour)
- Interpersonal Communication: Communicating with Confidence (1 hour)
- Interpersonal Communication: Listening Essentials (1 hour)
- Leadership Essentials: Building Your Influence as a Leader (1 hour)
- Leadership Essentials: Motivating Employees (1 hour)
- Leading Teams: Building Trust and Commitment (1 hour)
- Leading Teams: Developing the Team and its Culture (1 hour)
- Leading Teams: Establishing Goals, Roles, and Guidelines (1 hour)
- Leading Teams: Managing Virtual Teams (1 hour)
- Lockout/Tagout: Put a Lock on Hazardous Energy (1 hour)

- Machine Guard Safety (1 hour)
- Maintaining a Cooperative Workforce (.75 hour)
- Maintaining an Engaging Organization (1 hour)
- Maintenance (.5 hour)
- Managing Workforce Generations: Working with a Multigenerational Team (1 hour)
- Master Driver: Accident Procedures (.75 hour)
- Master Driver: Air Brakes (.75 hour)
- Master Driver: City Driving (.75 hour)
- Master Driver: Coupling & Uncoupling (.75 hour)
- Master Driver: Driving Techniques (.75 hour)
- Master Driver: Emergency Maneuvers (.75 hour)
- Master Driver: Extreme Weather Driving (.75 hour)
- Master Driver: Fixed Object Collisions (.75 hour)
- Master Driver: Night Driving (.75 hour)
- Master Driver: Pattern Driving (.75 hour)
- Master Driver: Rear End Collisions (.75 hour)
- Master Driver: Rural Driving (.75 hour)
- Materials Handling Safety (.75 hour)
- Materials Handling, Storage, Use and Disposal (.75 hour)
- Motorcoach: Defensive Driving (.75 hour)
- Motorcoach: Vehicle Inspections (1 hour)
- Motorized Pallet Jacks: Safe Operation (.5 hour)
- Order Entry: Booking a Load (.75 hour)
- Personal Protective Equipment: Employee Essentials (1.5 hours)
- Problem Solving: The Fundamentals (1 hour)
- Professional truck driver (10 hours)
- Project Management Fundamentals (1 hour)
- Pulling Doubles (1 hour)
- Respiratory Protection: Breathing Safely (1 hour)
- Respiratory Protection: PPE Workplace Safety (.5 hour)
- Rigging Safety (1 hour)
- Right Turns-Left Turns-Intersections (.5 hour)
- Safe Driving (.5 hour)
- Safety Audits (.75 hour)
- Safety Housekeeping and Accident Prevention (.75 hour)
- Safety Showers and Eye Washes (.75 hour)
- Safety Showers and Eye Washes in the Laboratory (.75 hour)
- Sales Ethics (.5 hour)
- School Instructor Training (1.5 hours)
- Section 11 - Pre-trip Vehicle Inspection Test (.5 hour)
- Section 6 - Combination Vehicles (.75 hour)
- Team Building for Employees (1 hour)
- Team Building for Supervisors (1 hour)
- TTT Refresher (Train-the-Trainer) (1.25 hours)
- Using Feedback to Improve Team Performance (1 hour)
- Welding Safety (.75 hour)
- Winter Safety (.75 hour)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee. PL is capped at 60 hours per-trainee.

RETRAINEE - JOB CREATION

Training Proposal for:

Holthouse Carlin & Van Trigt LLP

Agreement Number: ET17-0182

Panel Meeting of: August 26, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee SET Job Creation Initiative	Industry Sector(s):	Services Priority Industry: ☐ Yes ☒ No
Counties Served:	Los Angeles, Orange, Ventura, Contra Costa	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Number of Employees in:	CA: 442	U.S.: 460	Worldwide: 460
Turnover Rate:	15%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$303,000		$0	$0		$303,000

In-Kind Contribution:	100% of Total ETP Funding Required	$660,480

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills, Computer Skills, Continuous Imp., Adv. Technology	360	8-200	0-80	$675	$28.37
				Weighted Avg: 45			
2	Retrainee SET Job Creation Initiative	Business Skills, Computer Skills, Continuous Imp., Adv. Technology	60	8-200	0-80	$1,000	*$15.00
				Weighted Avg: 50			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Number 1: $28.37 per hour Statewide Average Hourly Wage.

Job Number 2 (Job Creation): $14.19 per hour for Contra Costa; $13.76 per hour for Orange County; $13.73 per hour for Los Angeles County; and $12.77 per hour for Ventura County.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $3.32 per hour in Job Number 1 may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Operation Support Staff (HR, IT, Admin)		25
Accounting Staff		105
Accounting Senior		75
Accounting Manager 1		55
Accounting Manager 2		25
Accounting Manager 3		20
Operation Manager/Director 1 (Frontline)		15
Operation Manager/Director 2 (Frontline)		10
Administration Support (Sales/Marketing/Misc.)		30
Job Number 2		
Operation Support Staff (HR, IT, Admin)		2
Accounting Staff		28

Accounting Senior		15
Accounting Manager		13
Administration Support (Sales/Marketing/Misc.)		2

INTRODUCTION

Founded in 1991, Holthouse Carlin & Van Trigt (HCVT) (www.hcvt.com) is a full-service accounting firm that provides accounting, tax, business advisory, and business management services. The Company is eligible for ETP funding under Special Employment Training (SET) for frontline workers.

HCVT serves private and public companies, business owners, high net-worth individuals, and family offices across select industry niches. These industries include real estate and hospitality, private equity/investment advisory, technology, professional service firms, media/entertainment, employee benefit plans, not-for-profit organizations. HCVT also serves various middle-market companies in manufacturing, retail, and distribution. The Company assists clients in all phases of the business cycle ranging from start-up to rapid growth, and mature companies/owners seeking exit strategies.

HCVT is headquartered in Los Angeles with other locations in Long Beach, Camarillo, Encino, Costa Mesa, Pasadena, Westlake Village, and Walnut Creek. The Company also maintains offices in Texas and Utah. Employees from all California locations will participate in the proposed training.

PROJECT DETAILS

With the California economy continuing to show positive signs of growth, the need for accounting and tax service remains very high. One of the Company's strategic objectives is to grow its revenues from $100 million to $150 million over the next five years. In working towards this goal, the Company believes it is critical to develop technical expertise and next generation leadership through comprehensive employee training.

In addition, there have been significant changes to the rules and regulations that govern accounting and tax services. Specific areas of change include Repair Regulations and International Financial Reporting Standards. HCVT plans to provide its workforce with a series of technical courses to address industry updates and changes.

HCVT's senior leadership team has also identified the need to revise various company processes and capabilities. Areas targeted for improvement include the use of tax and audit software tools, cross-selling, teambuilding, and effective leadership. To support this effort, the Company plans to invest between $600,000-$975,000 in computer and accounting software systems technology throughout the contract term.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

HCVT has committed to hiring 60 new employees (Job Number 2) to support its planned growth, including its recent expansion into Northern California. In an effort to gain new customers in the Bay Area, HCVT opened a new office in Walnut Creek and is evaluating the

possibility of an additional location closer to the San Francisco area. Over the next two years, the Company expects to gain “net new jobs” across all facilities in California. Extensive new employee training will play a vital role in the success of HCVT’s hiring efforts.

The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Training will take place at HCVT locations throughout California, and will be provided by in-house subject matter experts and outside vendors to be identified during the contract term. The majority of training will be delivered via class/lab; however, some training will be conducted via E-learning and/or computer-based training (CBT). CBT training will include a combination of intermediate/advanced computer skills and industry-specific education modules.

Business Skills (40%) - Training will be offered to all occupations. Due to the complexity of accounting practices and regulations, this training is specifically designed to equip employees with the necessary industry knowledge and skills to present clear, prudent business solutions to customers.

Computer Skills (25%) - Training will be offered to all occupations. Training will cover the fundamental concepts and architecture of tax, audit, and financial platforms. Training will also provide an understanding of cloud computing, analysis/research tools, and customer management software.

Continuous Improvement (25%) - Training will be offered to all occupations. Training will focus on quality control, performance team building, and problem solving as it relates to new financial and accounting services.

Advanced Technology (10%) - Training will be offered to Operation Support/IT Staff, Accounting Seniors, and Accounting/Operations Frontline Managers and Directors. These workers must upgrade their skills in the use of next-generation accounting tools. This training will provide workers with the skills to manage complex computer programming and data maintenance systems across all HCVT locations in California. The Company estimates that actual AT training costs will likely exceed $30 per hour, per trainee, depending on the subject matter. The trainer-to-trainee ratio will be capped at 1:10 to allow for the most conducive learning environment.

Prior Project

This will be HCVT’s second ETP Agreement within the past five years. The first project helped the Company strengthen its operations and lay the foundation for building a strong leadership team from within. The proposed training will support HCVT’s expansion into new markets and improve its ability to respond to growing opportunities in the accounting/tax services business.

Some curriculum topics are repeated from the prior Agreement; however, the Company has confirmed that course material has been updated and/or changed to ensure there will be no duplication of training. In addition, this project will include several newly-hired Job Creation employees (Job Number 2) who have not received any ETP training in the past.

Frontline Worker

HCVT uses several job classifications with Manager, Director or Senior in the title. However, the Company has confirmed that these employees actively manage teams and projects, provide training, and spend more than 50% of their time performing frontline work. These individuals do not hire, fire, or make company policy. Therefore, based on the nature and scope of their job duties, these trainees meet the Panel's definition of frontline workers. As frontline workers, these trainees qualify for SET funding and are not included in the percentage of managers and supervisors identified on Page 1 of this proposal.

Commitment to Training

HCVT spends approximately $210,000 annually on training at its California facilities. The Company's ongoing training includes introductory computer skills, company policies and procedures, new employee orientation, Partner training, and anti-harassment training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  The Company's Director of Recruitment and Training will oversee internal project administration. In addition, the Company has retained an outside administrative consultant to ensure that all training records adhere to ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by HCVT under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0364	Various	05/01/14 – 04/30/16	$198,750	$198,750 (100%)

DEVELOPMENT SERVICES

California Training Administration (CTA) in Rocklin assisted with development for a flat fee of $2,500.

ADMINISTRATIVE SERVICES

CTA will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours/E-Learning

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting and Auditing Update
- Accounting Methods & Techniques
- Auditing Techniques
- Best Practices/Expectations
- Business Acumen
- Business Development
- Business Etiquette
- Business Writing Skills
- Client Relationship and Management
- Conflict Management/Risk Management
- Consumer Product
- Corporate Tax Techniques
- Cross Selling Skills
- Customer Service
- Effective Presentations
- Ethics for Business
- Financial Planning
- Financial Services
- Flow-Through Entity
- High Net Worth Individual
- Influential Communication
- International Tax
- Technical Writing Utilizing Regulatory Guidance
- Technical Employee Orientation and Training (tax/audit processes)
- Negotiation Skills
- New Tax Methods
- Nonprofit Accounting & Audit
- Personal Branding
- Pension Plan
- Planning & Support
- Professionalism
- Proposal Writing/Report Writing
- Research Skills
- Running Effective Meetings
- Small Business Accounting
- State and Local Taxes
- Stock Compensation
- Tax Rules & Regulation Update
- Technical Research – Case Studies
- Trusted Advisor

COMPUTER SKILLS

- Accounting Research
- Adobe
- ADP HR, Recruiting, Payroll
- Bloomberg BNA
- CCH IntelliConnect Tax Research System
- CyberRecruiter
- Engagement Tax Training II
- Finance/Accounting Tools
- Go File Room (GFR)
- Go Systems Tax Software
- Halogen Evaluation System
- Harvard Business School- Advanced Excel Training
- Learnlive
- Lync Messenger
- M-3 / Dynalinking Tax Software
- Marketing Tools
- Microsoft CRM
- Microsoft Dynamics CRM System
- Microsoft Tools (Intermediate / Advanced only)
- Microsoft Quickbooks
- New Systems Training
- Optimization Training Tax Software
- Outlook/Instant Messaging
- PowerPoint Tools
- PPC SMART Practice Aid Audit research system
- Practice Management Billing system
- ProSystems fx Tax Software
- Publisher
- QuickBooks Advanced
- Security Mentor
- Sharepoint
- Sharefile
- Skype for Business
- Social Media Tools (LinkedIn, Twitter)
- SurePrep Tax Software
- Visual Practice Management
- RIA Checkpoint Tax Research System

CONTINUOUS IMPROVEMENT

- Building Effective Teams
- High Performing Teams
- Coaching – Delivering and Receiving Feedback
- Efficiency and Quality Improvements
- Problem Solving/Process Improvement
- Project Management Skills
- Team Building/Team Meetings
- Leadership Essentials:
    - Influential Communication
    - 5 Habits of Intentional Leadership
    - Conflict Resolution
    - Managing and Leading Change
    - Getting Things Done Through Change
    - Situational Leadership

ADVANCED TECHNOLOGY (1:10 ratio)

- Accounting Research - Adv. techniques
- Active Data
- CCH IntelliConnect Tax Research System - Adv. techniques
- Cyber Recruiter – Adv. techniques
- Go File Room (GFR) - Adv. Techniques
- Halogen Evaluation System – Adv. techniques
- LearnLive Compliance Skills – Adv. techniques
- M-3 / Dynalinking Tax Software – Adv. techniques
- New Systems Training (Database Tools / Cloud computing)
- PPC SMART Practice Aid Audit research system – Adv. techniques
- Practice Management Billing system – Adv. techniques
- ProSystems fx Tax Software – Adv. techniques
- Sharepoint /SurePrep Tax Software
- Sharepoint Design
- RIA Checkpoint Tax Research System – Adv. techniques

CBT Hours
0 - 80

CBT - COMPUTER SKILLS

- Software Training (1.5 hours)
- Tax/Audit Technical (3 hours)
- Cloud Computing (1 hour)
- Excel 2015 Database Development (1 hour)
- Managing and Analyzing Data in Excel 2010 (1.5 hours)

Lynda.com Microsoft Office (Intermediate & Advanced)

- Up and Running with Excel 2013 (2 hours)
- Cleaning Up Your Excel 2013 Data (1 hour)
- Managing and Analyzing Data in Excel 2013 (1.5 hours)
- Setting Up a Database in Excel 2013 (1 hour)

- Excel 2013: Financial Functions in Depth (2.5 hours)
- Excel 2013: Charts in Depth (3 hours)
- Excel 2013: Pivot Tables in Depth (3.75 hours)
- Excel 2013: Data Validation in Depth (1 hour)
- Excel 2013: Advanced Formatting Techniques (3 hours)
- Excel 2013: Macros in Depth (2.75 hours)
- Excel 2013: Managing Multiple Worksheets and Workbooks (1 hour)
- Excel 2013: Advanced Formulas and Functions (5 hours)
- Excel 2013: Power Shortcuts (3.75 hours)
- Excel 2013: Working with Dates and Times (1 hour)
- Excel 2013: Essential Training (4.75 hours)
- Excel 2013: New Features (2 hours)
- Excel 2013: Real-World Projects (.5 hour)
- Up and Running with VBA in Excel (3 hours)

CBT - BUSINESS SKILLS

- Revenue Recognition Update (2 hours)
- Compilation, Review, and Preparation (1 hour)
- Business Succession Planning: Case Studies (2 hours)

Becker Training

- Capital Gain & Losses (1 hour)
- Corporate Tax Strategies (2 hours)
- Estate & Gift Taxes (2 hours)
- Federal Tax Accounting - Inventory (2 hour)
- Financial Statement Analysis (3.5 hours)
- Individual Taxation (2 hours)
- Real Estate Taxation (2 hours)
- Forensic Accounting (2 hours)
- Audit Risk Assessment (3 hours)
- Partnerships (3 hours)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee.

RETRAINEE - JOB CREATION

Training Proposal for:

Altman Specialty Plants, Inc.

Agreement Number: ET17-0175

Panel Meeting of: August 26, 2016

ETP Regional Office: San Diego **Analyst:** J. Davey

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative HUA	Industry Sector(s):	Agriculture Priority Industry: ☒ Yes ☐ No
Counties Served:	Monterey, Riverside, San Diego	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Number of Employees in:	CA: 1,965	U.S.: 2,616	Worldwide: 2,616
Turnover Rate:	17%		
Managers/Supervisors: (% of total trainees)	7%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$467,170		$37,908 15% Job Number 1 only	$0		$429,262

In-Kind Contribution:	100% of Total ETP Funding Required	$532,760

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials, PL-Commercial Skills	351	8-200	0	**$612	$16.46
				Weighted Avg: 40			
2	Retrainee Priority Rate HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials, PL-Commercial Skills	341	8-200	0	$450	*$11.70
				Weighted Avg: 25			
3	Retrainee Priority Rate Job Creation	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials, PL-Commercial Skills	64	8-200	0	$500	*$13.72
				Weighted Avg: 25			
4	Retrainee Priority Rate HUA Job Creation	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials, PL-Commercial Skills	58	8-200	0	$500	*$10.00
				Weighted Avg: 25			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

**Reflects Substantial Contribution.

Minimum Wage by County: San Diego - Job 1: $16.46; San Diego – Job Number 3: $13.72 Riverside/Monterey (HUA) – Job Number 2: $11.70; Riverside/Monterey (HUA, Job Creation) – Job 4: $10.00

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $2.34 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 & 3, and $1.70 for Job Number 2.

Wage Range by Occupation				
Occupation Titles	Wage Range		Estimated # of Trainees	
	Job 1	**Job 3 – Job Creation**	**Job 1**	**Job 3**
Administrative Staff			16	1
Distribution Staff			70	13
Managers			16	2
Production Staff			230	45
Supervisors			19	3
Occupation Titles - HUA	Wage Range		Estimated # of Trainees	
	Job 2	**Job 4 – Job Creation**	**Job 2**	**Job 4**
Administrative Staff			8	1
Distribution Staff			48	10
Managers			8	1
Production Staff			267	45
Supervisors			10	1

INTRODUCTION

Founded in 1975 and headquartered in San Diego, Altman Specialty Plants, Inc. (Altman) is a wholesale nursery. The Company provides a broad assortment of plants, flowers, shrubs, and other botanical products to retail nurseries, home and garden centers, and other stores throughout the southwest and western U.S. Altman operates growing centers in Vista, Salinas, and Perris which will participate in training. The Company's customers include The Home Depot, Lowe's Home Improvement, Orchard Supply & Hardware, and Walmart.

Altman is eligible as a single employer for standard retraining and priority-industry funding under the out-of-state competition provisions as a NAICS identified industry (crop production). All trainees are employed full-time (at least 35 hours per week) and are not seasonal workers.

Altman continues to face stricter customer demands, such as including customer specific plant labeling, bar-coding, and plant containers, in a highly competitive wholesale nursery marketplace. The Company continuously introduces modern technological advances in machinery and operations to meet competitive pressures on price and production costs. To prevent passing along price increases to its customers, Altman must create greater efficiencies and streamline its operations.

This is the third ETP proposal for Altman Specialty Plants, Inc. In its first ETP project, Altman provided its first formalized training in Business, Commercial, Computer, and Continuous Improvement skills to meet the demands of its customers, such as Lowe's and Walmart. Over 260 trainees at the Company's 3 facilities (Vista, Salinas, and Perris) received an average of 62 hours of training.

In its second ETP project, Altman provided cross training in commercial plant propagation, planting, irrigating and other related skills. It also introduced Leadership Development to its frontline supervisory and management staff to improve accountability and efficiency. Water conservation and the first steps in sustainability were also introduced to workers at all locations.

In this third project, Altman will continue to provide necessary Leadership and Coaching & Counseling training to its frontline Supervisors and Managers. Because the Company grows over 5,000 different types of plants, it takes more than one training cycle to train its Production and Distribution Staff. In addition, the challenges of growing so many plant varieties and their respective environmental variables (climate, soil, and water), along with a changing regulatory environment, means that trainees need additional training to become proficient in plant propagation and growing techniques, as well as proper shipping and delivery requirements. Each year the Company tests 200-500 new plant varieties to determine what plants will be marketable and go into full production in the following year.

The training will differ from the previous project in the subject matter and will focus on motivating trainees to be more proactive in goal setting and planning. The Company will also provide more advanced skills in the Company's ERP application, Evolution. Most of this training will be delivered to its Administrative Staff (IT) who develop and maintain the system. Any repeat of curriculum provided in previous projects will be for trainees who, either did not receive it before, or will receive training in more advanced skills that build on previous training.

In an effort to be more efficient in its use and conservation of water, Altman plans to train its employees on best practices in irrigation management. Altman will also train on the use of its water recycling system which began during the last ETP Agreement. This system saves over 100 million gallons of water per year. This complex project continues to require training to maximize its usefulness. Training not only involves irrigation management as it relates to plant requirements, but also as it relates to new more efficient water irrigation systems currently in use.

Altman has also initiated a lean strategy process to improve its supply chain efficiency. The full implementation of this program will require a significant amount of training at each nursery site. Approximately 400-500 employees will receive up to 50 hours of training on the Lean Manufacturing.

PROJECT DETAILS

Training Plan

Altman will provide a customized range of class/lab and productive lab training skills that will give its employees the necessary tools and knowledge to improve productivity, quality, and efficiency. Trainees will receive most of their training in-house, however, a small portion of training will be provided by subcontracted training vendors.

Business Skills (25%): All trainees will receive training in Leadership, Project Management, Time Management, and other related business skills. These skills are needed for newly-hired staff to bring them up-to-speed in the skills and knowledge to do their jobs and also provide them with the knowledge to better understand their roles in the organization, to understand customer needs, and adapt to new functions as needed.

Commercial Skills (25%): Most of the trainees to receive this training will be Distribution and Production Staff; however, employees from other departments may receive some training in these skills. These skills are needed for newly-hired staff to become current in the skills and

knowledge to do their jobs safely and efficiently. Trainees will receive training in Equipment Operation, Driving & Delivery Techniques, Growing Techniques, Merchandising, Order Fulfillment and other skills related to the efficient production and delivery of the Company's products.

Computer Skills (25%): All trainees will receive customized training in the Company's Evolution ERP system**.** This training is necessary because Altman's IT Department is continually working to enhance this system. Additionally, selected trainees will receive training in Microsoft Office at the Intermediate or Advanced levels depending on individual need.

Continuous Improvement (25%): All trainees will receive training in Process and Quality Improvement and Lean Manufacturing. These skills will allow staff to improve growing and production techniques, meet customer requirements more effectively, and identify areas where continuous improvements can be made. Newly-hired staff will benefit from this training to stay current with skills and knowledge to do their jobs effectively and efficiently.

Hazardous Materials (HAZMAT) (5%): This training will be offered to Production Staff, Distribution Staff, Managers, Supervisors, and selected Administrative Staff on the proper handling and disposal of hazardous materials, including how to safely use, transport, and store pesticides and herbicides, and Material Safety Data Sheets. This training can also be a series of courses, specific to industry sectors involved in the transport of hazardous materials. However, Hazardous Materials training in this proposal focuses on the safe use and disposal of toxic herbicides and pesticides and does not lead to a certification.

Productive Laboratory (PL) (5%): Trainees may produce goods for profit as part of PL training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

Due to the nature of plant production, hands-on training is needed for new equipment, procedures, growing and harvesting techniques. Trainees work outdoors and must learn how to operate production equipment in that environment, where there is adequate space to operate equipment. Some of the equipment is used for plant propagation and production, involving soil preparation, planting, and harvesting, which can only occur at the work site.

Production Staff, Distribution Staff, Managers and Supervisors, will participate in PL. Trainer-to-trainee ratios will not exceed 1:3. (Most of the PL training will be conducted 1:1; however, there are some instances where it is more effective to conduct PL training in 1:3 ratios when trainees work in small teams). PL will focus on operating planting and related equipment: Soil Mixing machine, Transplanter Machine, Seeding Machines, Flat Filler Machines, Tricycle tractors, Robotic Equipment. Trainees may receive up to a maximum of 40 total hours of PL, within a range of 0-20 hours per course title in the curriculum, depending on individual need and job requirements.

Altman has provided a list of tasks trainees will perform and competencies they will achieve. Trainers will demonstrate the operation of the equipment and then observe trainees, correcting errors, and ensuring safe and proper techniques are used. Trainers will certify trainees once they are deemed competent. At the conclusion of PL, trainees will be competent in the safe operation, maintenance, and use of equipment or machinery to meet minimum productivity standards.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

Altman has committed to hiring 122 new employees (Job Numbers 3 and 4). Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Substantial Contribution requirement does not apply to Job Creation.

Altman intends to open new growing facilities in California and upgrade and expand current nursery facilities. This will necessitate the hiring and training of additional new employees, thus "net new" jobs will be created. The Company also plans to expand business capacity by acquiring or adding additional growing facilities.

Altman's business has grown to such an extent that it was able to add 692 new jobs during its most recent ETP contract. The Company anticipates a similar growth pattern has conservatively estimated the number of new employees needed to accommodate its continued expansion. The Company is preparing two newly acquired facilities in San Diego County that will provide approximately 155 acres of growing space for products. This will increase its San Diego County growing operations by approximately 20%.

High Unemployment Area

The 399 trainees in Job Numbers 2 & 4 work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's locations in Salinas and Perris qualify for HUA status under these standards.

- Wage Modification

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Trainees in Job Number 2 are currently employed with Altman and must show a wage increase from the ETP minimum $11.70 at the end of the 90 day employment retention period. Some of the 341 trainees (8-30) in Job Number 2 will need a HUA wage modification. Trainees in Job Number 4 will be newly-hired within three months prior to the beginning term of the Agreement or during the Agreement and do not have to show a wage increase.

Altman is also requesting a wage modification from $11.00 to $10.00 per hour for some of the 58 newly-hired Job 4 trainees in an HUA. (5 to 10).

It will be made a condition of contract that the trainees in Job Number 4 will never be paid less than the statewide minimum wage rate in effect at the end of retention.

Substantial Contribution

Altman is a repeat contractor with payment earned in excess of $250,000 at all three facilities combined within the past five years. Altman has received more than $250,000 in ETP funding for incumbent worker training conducted at the Vista location in 2 Agreements over the last five years. Therefore, a 15% substantial contribution will be applied to the total eligible amount for Job Number 1 only.

Commitment to Training

Altman does not currently budget for training. It does, however, provide training on an as-needed basis for new-hire orientation and mandatory and essential training such as OSHA safety training. In the past, the Company has only been able to provide minimal training.

Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Altman under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET15-0219	Statewide	8/1/14 – 7/31/16	$352,500	$352,500 (100%)*
ET12-0430	Statewide	6/25/12 – 6/24/14	$279,720	$279,720 (100%)

*Altman has tracked over 23,000 eligible training hours for 872 trainees who have completed training and retention. Therefore, it projects 100% earnings ($352,500). The closeout invoice will be submitted by 8/31/16.

DEVELOPMENT SERVICES

Altman retained Training Funding Source (TFS) in Seal Beach to assist with development of this proposal for a flat fee of $9,500.

ADMINISTRATIVE SERVICES

TFS will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Coaching and Counseling
- Leadership
- Meeting Facilitation

COMMERCIAL SKILLS

- Confined Space (training on how to follow procedures and work around tanks and other confined spaces)
- Driving and Delivery techniques
- Equipment Operations
- Forklift
- Growing Techniques
- Inventory Control
- Irrigation systems
- Merchandising
- Order Fulfillment
- Pay by Scan
- Planting
- Product availability
- Water recycling/efficiency

COMPUTER SKILLS

- Evolution (ERP software)
- MS Office (intermediate/advanced only)

CONTINUOUS IMPROVEMENT

- HACCP (Hazard Analysis and Critical Control Points)
- Process improvement
- Quality Improvement
- Lean Manufacturing

HAZARDOUS MATERIALS

- HazMat
- Hazardous Material Handling (Pesticides and Other Hazardous Materials)
- MSDS (Material Safety Data Sheets)

Safety Training is capped at 10% of a trainee's total training hours

PL Hours
0 – 40

COMMERCIAL SKILLS (1:3 Ratio)

- Production Equipment Operation and Maintenance

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 40 hours per-trainee.

RETRAINEE - JOB CREATION

Training Proposal for:

ARS National Services Inc.

Agreement Number: ET17-0140

Panel Meeting of: August 26, 2016

ETP Regional Office: San Diego **Analyst:** M. Ray

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative	Industry Sector(s):	Services Priority Industry: ☐ Yes ☒ No
Counties Served:	San Diego, San Bernardino	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 320	U.S.: 423	Worldwide: 423
Turnover Rate:	15%		
Managers/Supervisors: (% of total trainees)	5%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$100,600		$0	$0		$100,600

In-Kind Contribution:	100% of Total ETP Funding Required	$333,371

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Computer Skills	240	8 - 200	0 - 9	$375	*$15.60
				Weighted Avg: 25			
2	Retrainee Job Creation	Business Skills, Computer Skills	10	8 – 200	0 – 9	$1,060	*$13.72
				Weighted Avg: 53			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Number 1: $15.60 per hour in San Bernardino and $16.46 per hour in San Diego

Job Number 2 (Job Creation): $13.72 per hour in San Diego

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $2.85 per hour for Job Number 1 and up to $0.72 per hour for Job Number 2 may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
San Diego County		
Administrative Support		47
Account Representative (Call Center Staff)		110
Manager/Supervisor		7
San Bernardino County		
Administrative Support		3
Account Representative (Call Center Staff)		70
Manager/Supervisor		3
Job Number 2		
San Diego County		
Administrative Support		2
Account Representative (Call Center Staff)		6
Manager/Supervisor		2

INTRODUCTION

Founded in 1987, ARS National Services Inc. (ARS) (www.arsnational.com) is a third-party accounts receivable management agency that provides debt collection services including managing post charge-off receivables for financial institutions including major banks and credit card companies such as JP Morgan Chase and Citibank. The Company also provides consumers payment options and methods to allow them to resolve past due debts. This will be the Company's first ETP Agreement.

Headquartered in Escondido, ARS has three call centers located in Escondido, Rancho Cucamonga and Jacksonville, FL. The proposed training will target approximately 250 workers at the Company's Southern California facilities located in Escondido and Rancho Cucamonga.

ARS is an entity eligible for standard retraining as a company primarily engaged in providing services directly to customers located both inside and outside of California, as outlined under 22CCR, Section 4416(d)(3,4).

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

To support the expansion of the Company's existing business capacity from consumer credit card companies and new customers from auto (servicing new/used car, motorcycle, and motorsports loans) and healthcare industry (servicing overdue premium/copay), ARS has committed to hiring 10 new employees (Administrative Support, Account Representative [Call Center Staff] and Manager/Supervisor) at its Escondido facility. These newly-hired workers (Job Number 2) will allow the Company to meet increased demands of current customers and service an increasing client base.

ARS represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of contract.

PROJECT DETAILS

ARS is growing as the customer demands increase. For example:

- In 2015, two major clients consolidated its network which required ARS to provide additional services, increasing the Company's market share;
- In January 2016, one of the Company's existing clients obtained additional market share into a new asset class which will allow ARS' services to expand into the auto industry;
- In January 2016, ARS obtained its first new client in the healthcare industry. This customer provides outsourced staffing, billing, and revenue cycle management to approximately 3,400 hospitals, clinics, and physician groups nationwide. This new customer relationship will result in the Company's expansion into this new market; and
- ARS is currently in the final stages and will complete its contract negotiations at the end of 2016 for a new customer in student lending (servicing defaults on federally-funded student loans).

To successfully support increased customer demands and continue to provide exemplary customer service, ARS must be up-to-date on the latest regulations, issues, and business plans

in all aspects of collection services for existing customers and new markets. To help meet this challenge, ARS has committed to enhance company-wide business processes.

To start, in 2015, ARS named a new Chief Executive Officer and President who is driving the Company to become a learning organization, fully investing in improving the skills of its workers. The vision is to provide greater opportunities for employees to grow professionally as the Company expands its business. To this end, the Company developed a more structured training program that will provide its workers with increased skills to achieve a higher level of customer service. A key part of this strategy is to provide significant ongoing learning and development opportunities to its employees.

To support its strategic goals, the Company also invested approximately $80,000 on a new phone system, LiveVox, and $10,000 for a new software system, SharePoint. Both systems will be implemented in August 2016. Training in these new systems is expected to be delivered in the next two years.

With the help of ETP funding, ARS will be able to supplement some of its Business and Computer Skills training specifically for improving trainee's ability to work efficiently and effectively. The overall training plan will allow the Company to provide the highest level of transparency and integrity in every interaction with clients, supporting increased customer expectations and ARS' commitment to long-term success.

Training Plan

Training will be delivered by in-house subject matter experts, however, the Company may acquire outside training vendor's. The proposed training plan consists of the following skills:

Business Skills (67%) – Training will be provided to all occupations. Training topics include Communication, Customer Relations, Leadership and Time Management skills to improve customer service and interpersonal skills. Skills training in coaching, critical and creative thinking, process improvement, project management, goal setting, problem solving, and team building will allow trainees to build effective relationship between employees and customers while Sales training will allow trainees to improve relationship between ARS's direct customers.

Computer Skills (30%) – Training will be provided to all occupations as it pertains to their job duties. Staff will receive training in various software systems including Sage 300, SharePoint, Cisco, VMware, Network+, and Security+. Training will allow workers to navigate data successfully and systems to increase efficiencies.

Computer-Based Training in Commercial Skills (3%)

Modification

Normally, CBT hours are capped at 50% of total training hours per-trainee. However, under this proposal, ARS is asking to be reimbursed for up to 100% CBT. (See Exhibit B).

ARS states that to enable workers to stay current and keep clients in compliance with regulatory changes, trainees need company-mandated training topics (Anti-Money Laundering; Call Recording and Disclosure; Equal Credit Opportunity; Fair Credit Reporting; Fair Debt Collection Practices Act; Fair Lending Policy; Recognizing Financial Elder Abuse etc.) Training in these topics will also ensure that workers treat customers with respect and understanding.

The Company reports that Commercial Skills training delivered via CBT will allow flexibility to provide the above company-mandated training based on stages of development and production throughout the two-year term of the proposed Agreement. CBT is a major part of ARS' training practices and policies designed to prepare and support its workforce. It provides deeper understanding of financial services strategies and processes. The self-paced CBT delivery method will allow workers to participate in training during the workday when it best suits their job schedule or staffing demand.

CBT is typically used to supplement planned instructor-led learning to ensure a solid understanding of the concepts presented. Although the majority of ETP training will be delivered via classroom/laboratory, up to 50% (120 of 240 trainees) in all occupations in Job Number 1 (incumbent workers) may receive all their training via CBT (up to 9 hours, per trainee). The request to fund 100% CBT will allow the Company to include these trainees in the proposed training plan.

Commitment to Training

ARS' annual training budget is approximately $300,000 for Escondido and $170,000 for Rancho Cucamonga. The current training method consists of classroom, laboratory, on-the-job, and CBT setting. The Company provides mandatory Business, Computer and Continuous Improvement Skills training as well as optional CBT modules from its Learning Resource Center. In addition, ARS provides additional training to enhance skills in products and services for any changes in policies or regulations. ARS represents that ETP funds will not displace the existing financial commitment to training.

- Training Infrastructure

ARS has retained an administrative subcontractor to assist with ETP project administration. The Company's Vice President of Talent Resources will oversee the ETP project and meet with ETP staff during monitoring visits. A Talent Resources Coordinator will work with the training team, collect and maintain original documentation (paper-based attendance rosters), and submit a copy to the administrative subcontractor for data entry into the ETP online systems.

ARS has eight full-time staff members dedicated to recruitment and training. Four of whom are responsible for curriculum design and training delivery. The staff has also been designated to schedule, implement and deliver ETP training.

Commission Sales

ARS Supervisors and Account Representatives receive commission compensation; however, commissions will not be used to meet the ETP minimum wage requirement.

Supervisor commission plan is based on four specific areas, Account Representative's development, team quality and compliance metrics, client goals, and a revenue component. Account Representative commission plan is based on certain quality and compliance metrics including call quality, account documentation, account handling, client call monitoring and other factors, revenue targets.

ARS is not in Retail Trade; therefore, not affected by the Panel's recent Strategic Plan low funding priority placement of Commission Sales occupations in Retail Trade.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Training Funding Source in Seal Beach assisted with development for a flat fee of $6,900.

ADMINISTRATIVE SERVICES

Training Funding Source will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Communications Skills
  - Asking Effective Questions
  - Creating Meaningful Conversations
  - Finding the Right Pace
- Customer Relations
  - Building Relationships over the Phone
  - Creating a Positive Customer Experience
- Coaching Skills
- Critical Thinking Skills
- Creative Thinking Skills
- Negotiation Skills
  - Finding the Right Solution
- Leadership Skills
  - Lead with your Strengths
  - Accountability
  - Conducting a Successful Meeting
- Time Management Skills
  - Prioritizing Made Simple
- Process Improvement
- Project Management
- Document Management
- Goal Setting
- Problem Solving Skills
- Sales Skills
- Team Building
- Writing Effective Policies and Documenting Procedures

COMPUTER SKILLS

- Adobe
- WordPress
- Columbia Ultimate Business Solution
- Data Analysis Skills
- Microsoft Office (Intermediate and Advanced)
- Prezi Presentations
- Software Programming Skills
- Sage 300
- SharePoint
- Structured Query Language
- Cisco Networking
- Data Security
- Windows Server and Active Directory
- VMware
- Network+
- Security+

- LiveVox (Telecomm)
- Information Technology Infrastructure Library

CBT Hours

0 - 9 **COMMERCIAL SKILLS**

- Anti-Money Laundering (0.5 hour)
- Call Recording and Disclosure (0.5 hour)
- Equal Credit Opportunity (0.5 hour)
- Fair Credit Reporting (0.5 hour)
- Fair Debt Collection Practices Act (0.5 hour)
- Fair Lending Policy (0.5 hour)
- Recognizing Financial Elder Abuse (0.5 hour)
- General Banking Industry Knowledge (0.5 hour)
- Information Technology Security and Privacy (0.5 hour)
- Protecting Customer Privacy (0.5 hour)
- Protecting Customers through the Fair Credit Reporting Act (0.5 hour)
- Unfair, Deceptive, or Abusive Acts or Practices (0.5 hour)
- Computer Systems (1 hour)
- Servicemembers Civil Relief Act (0.5 hour)
- Treating Customers Fairly (0.5 hour)
- State Laws (0.5 hour)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee, in Job Number 2.

RETRAINEE - JOB CREATION

Training Proposal for:

Optima Tax Relief, LLC

Agreement Number: ET17-0139

Panel Meeting of: August 26, 2016

ETP Regional Office: San Diego **Analyst:** K. Campion

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Veterans	Industry Sector(s):	Financial Services Priority Industry: ☐ Yes ☒ No
Counties Served:	Orange	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		
Number of Employees in:	CA: 380	U.S.: 380	Worldwide: 380
Turnover Rate:	5%		
Managers/Supervisors: (% of total trainees)	6%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$108,801		$0	$0		$108,801

In-Kind Contribution:	100% of Total ETP Funding Required	$139,782

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Commercial Skills, Computer Skills, Cont. Imp.	259	8 - 200	0	$315	$16.51
				Weighted Avg: 21			
2	Retrainee Job Creation	Business Skills, Commercial Skills, Computer Skills, Cont. Imp.	42	8 - 200	0	$560	*$13.76
				Weighted Avg: 28			
3	Retrainee Veterans Job Creation	Business Skills, Commercial Skills, Computer Skills, Cont. Imp.	6	8 - 200	0	$616	*$14.00
				Weighted Avg: 28			

*It will be made a condition of contract that trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Number 1: $16.51 per hour for Orange County; Job Number 2 (Job Creation): $13.76 per hour for Orange County; Job Number 3 (Veterans): $13.76 per hour for Orange County

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $1.46 per hour for Job 1; and up to $0.76 per hour for Job 2 may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1		
Analyst		20
Enrolled Agent		13
Associate & Support Representative		25
HR Professional		6
Specialist		70
Tax Consultant		70
Tax Preparer & Clerk		24
Helpdesk Technician		6
Payment Coordinator		10
Supervisor/Manager		15

JOB NUMBER 2		
Analyst		2
Enrolled Agent		1
Associate & Support Representative		4
Specialist		13
Tax Consultant		8
Tax Preparer & Clerk		9
Helpdesk Technician		2
Payment Coordinator		1
Supervisor/Manager		2
JOB NUMBER 3		
Specialist		4
Tax Preparer		2

INTRODUCTION

Founded in 2011 and located in Santa Ana, Optima Tax Relief, LLC (Optima) is a full service tax preparation and tax resolution company that specializes in resolving and reducing IRS or State tax debt for consumers (http://optimataxrelief.com/). Optima's services include Tax Consultations & Preparations, Tax Negotiations and Resolutions, Installment Payment Agreements, Partial Payment Settlement Agreements, Offer in Compromise, Tax Penalty Abatements, and other services for individual customers located across the country.

Due to a growing market share and increase in its customer base, Optima has increased its employee base from 158 full-time staff in 2013 to 380 today. Optima must ensure its workers are able to sustain the growing demand for the Company's services while maintaining the top-tier service customers have come to expect. This will require training.

Further, Optima must comply with the rapid changes in IRS, state, and local tax laws, codes, and regulations. To continue to provide customers with sound financial advice, and help resolve tax debt for consumers, Optima must look for new ways to increase and improve operations, and increase workers' job knowledge. To help meet this challenge, the Company has developed a company-wide, comprehensive training program.

The need for training is also driven by the implementation of new customer service and sales management software to be implemented in 2016. Optima is moving to a new *Salesforce* platform that will result in substantial changes to its customer service and sales processes, requiring staff training to navigate the new system applications.

Retrainee - Job Creation

In 2013 Optima increased its overall staff by 131 new positions. Sixty-one new positions were created in 2014. The Company estimates expansion will continue into 2016/2017, and forecasts adding 190 net new jobs in the next two years. The Company proposes to hire and train 48 under this proposal (Job Numbers 2 & 3). Optima is expanding its business capacity work space to include a new office building.

The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. All Veteran trainees will be classified as Job Creation, and hired under the benchmark period set forth in the Retrainee Job Creation guidelines.

Optima reports that it hires Veterans on a regular basis and is committed to hiring and training at least six Veterans under this Agreement (Job Number 3).

Training Plan

The majority of training will be delivered via class/lab by in-house instructors. Optima may hire training vendors to deliver training, but training vendors have yet to be determined.

Business Skills (30%) – This training will be offered to all occupations in order to improve customer service while increasing efficiency and standards with new internal procedures. Other projected benefits include improvements in operational procedures and improve workflow production.

Commercial Skills (30%) – This training will be provided to all occupations so trainees can better understand the new plan service models and pricing structures. Internal Revenue Service regulations continue to change and training is necessary to stay current and keep clients in conformance with these changes. Also, trainees will be better able to assist clients with up-to-date information that impacts deliverables.

Computer Skills (20%) – This training will be provided to all occupations so trainees can improve productivity by using database tools to navigate client plan specifications and data, become familiar with the ever changing Internal Revenue Service reporting and software applications. Other benefits include improving trainee ability to service clients with upgraded and improved client management software.

Continuous Improvement (20%) – This training will be provided to all occupations so trainees can learn how to set specific, measurable, attainable, and timely goals to improve operational effectiveness. Improved processes, systems and operational improvements are projected as a result of this training.

Commitment to Training

Optima currently spends approximately $35,000 per year on training that includes new-hire orientation, sexual harassment prevention, legally-mandated training, Supervisor 101 training, Leadership Skills, software application skills training, new-hire department specific job training, and on-the-job training.

ETP funds will not displace the Company's existing financial commitment to training. ETP training will help improve workers' skills resulting in improved operational effectiveness while enabling Optima to grow.

- Training Infrastructure

The Director of Human Resources will have program oversight and will be assisted by HR staff to schedule and implement the training plan, and ensure that all training is properly documented

according to ETP recordkeeping requirements. Optima will utilize an administrative subcontractor for enrolling and tracking trainees in the ETP online systems.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Training Funding Source (TFS) in Seal Beach assisted with development for a flat fee of $6,900.

ADMINISTRATIVE SERVICES

TFS will also perform administrative services for an amount not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting
- Coaching/Counseling
- Customer Service
- Communication Skills
- Delegation
- Employee motivation
- Internal Procedures
- Leadership
- Marketing
- Negotiation Skills
- Office Procedures
- Performance Development
- Time Management
- Workflow Production

COMMERCIAL SKILLS

- Audit Representation
- Case Management Review
- Currently Non Collectible
- Dispute Resolution
- Internal Revenue Service Procedures
- Installment Agreement
- IRS Audit Defense
- IRS Negotiations
- Lien Subordination
- Offer in Compromise
- Penalty Abatement or Adjustment
- Payroll Tax
- Reduce IRS Tax Debt
- Resolve Back Taxes
- State Tax Issues
- Tax Levies & Liens
- Tax Negotiation & Settlement
- Unfiled Returns (Non Filer)
- Wage Garnishment/Bank Levy Release

COMPUTER SKILLS

- Client Management System (CMS) database
- Desktop Troubleshooting
- File Management
- Human Resources Information System (HRIS)
- Java/Website Management
- Microsoft Office (Intermediate & Advanced)
- Payroll Systems Software

- Salesforce Application Skills
- Software Developer Tools

CONTINUOUS IMPROVEMENT

- Operational Efficiency/Effectiveness
- Performance Management & Goal Setting
- Process Improvements
- System Improvements

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.

RETRAINEE - JOB CREATION

Training Proposal for:

Temecula Valley Hospital, Inc. dba Temecula Valley Hospital

Agreement Number: ET17-0168

Panel Meeting of: August 26, 2016

ETP Regional Office: San Diego **Analyst:** M. Ray

PROJECT PROFILE

Contract Attributes:	SET Priority Rate Medical Skills Training Retrainee Job Creation Initiative	Industry Sector(s):	Healthcare Priority Industry: ☒ Yes ☐ No
Counties Served:	Riverside	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 4,264	U.S.: 50,527	Worldwide: 53,223
Turnover Rate:	3%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$285,000		$0	$0		$285,000

In-Kind Contribution:	100% of Total ETP Funding Required	$601,350

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate Medical Skills Training	MS - Didactic, MS - Clinical Preceptor, Computer Skills, Continuous Impr	100	8 - 200	0 - 16	$1,800	$33.60
				Weighted Avg: 100			
2	Retrainee SET Priority Rate Medical Skills Training Job Creation Initiative	MS - Didactic, MS - Clinical Preceptor, Computer Skills, Continuous Impr	35	8 – 260	0 – 16	$3,000	$33.60
				Weighted Avg: 150			

Minimum Wage by County: Statewide Average Hourly Wage: $28.37
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Registered Nurse		100
Job Number 2		
Registered Nurse		3
New Graduate Registered Nurse		32

INTRODUCTION

Founded in 2013, Temecula Valley Hospital, Inc. dba Temecula Valley Hospital (TVH) (www.temeculavalleyhospital.com) is the first hospital built in the city of Temecula. TVH has 140 private licensed beds, 20 extensive care beds, 4 high-tech surgical suites, a cardiovascular surgical suite, and a catheterization laboratory. The Hospital also boasts an advanced electronic clinical information system and digital imaging capabilities. TVH offers a full range of medical services including cardiovascular, stroke care, orthopedics, pulmonary care, as well as general and vascular surgery. TVH is a designated STEMI (ST Elevated Myocardial Infarction and Chest Pain) Receiving Center and a Joint Commission accredited Stroke Center.

TVH is owned by Universal Health Services (UHS), a healthcare management company, which operates behavioral health facilities, acute care hospitals, and ambulatory surgery and radiation centers nationwide. UHS owns five hospitals in Southern California located in the cities of

Corona, Murrieta, Wildomar, Palmdale, and Temecula. All five affiliated hospitals have benefited from ETP funding in the past. Each hospital operates autonomously, including one hospital with an active ETP contract: Universal Health Services of Rancho Springs, Inc. dba Southwest Healthcare System (ET16-0389, term 4/4/16 – 4/3/18), which was funded last Fiscal Year.

This project is targeted for TVH only and is the second ETP project for this hospital in the last five years. The hospital is eligible for ETP funding under Special Employment Training (SET) for frontline workers and qualifies for ETP's priority industry reimbursement as a healthcare employer.

PROJECT DETAILS

In its previous ETP project, completed May 2016, TVH was able to provide computer, continuous improvement, and extensive medical skills training to approximately 180 New Grad and experienced Registered Nurses (RNs). Training allowed the hospital to provide nurses with advanced skills to support patient care services when it first opened its doors in October 2013.

In this proposal, training is driven by the Hospital's continued expansion of new services as identified through its strategic business plan. A new Progressive Care Unit is scheduled to open fall of 2016. Further, TVH will be expanding its facility to add two more cardiac catheterization laboratories and another operating room suite. The Hospital's expansion plan is expected to be completed in 2018 which also includes expanding the imaging area and adding a second CT scanner to fully support the cardiac services program as well as anticipated patient volume increase in the next two years.

As TVH continues to experience immense growth in its programs and services, the hospital has also seen an influx of patients. TVH's business growth and increase in patient population necessitates they continuously recruit and train RNs to maintain quality patient care. However, due to the lack of sufficient experienced nurses in the labor market TVH must retrain incumbent staff and/or hire New Graduate nurses and provide them with advanced medical skills training to successfully perform duties for areas of specialty such as the Emergency, Intensive Care, Perioperative Services, and Cardiovascular Services.

TVH has recruited a new executive level administrative and support staff to ensure successful implementation of the Hospital's training program initiatives. As the Hospital continues to grow, the new administrative team will focus on training throughout the organization with a primary emphasis on nursing education to improve clinical outcomes, increase patient satisfaction, and support increased patient demands.

Training Plan

In this proposal, some training curriculum will be repeated; however, TVH ensures the curriculum will not be delivered to the same incumbent workers. In addition, the proposed project will include a large percentage (35%) of net, new hire Job Creation trainees (Job Number 2) who have not received ETP training in the past. The proposed training will expand on training delivered in the previous project focusing on patient and family centered care, service excellence, equipment, technology, and policies and procedures improvement.

Training will be delivered mostly by in-house trainers; however, TVH may acquire outside training vendors to deliver training during the contract term.

Medical Skills Training (85%)

In this proposal, all nurses will receive Medical Skills training. Trainees will utilize one or both didactic and clinical with preceptor training methodologies as it pertains to their job function or specialty. Further, New Graduate RNs, newly-hired experienced nurses, and some incumbent nurses are projected to participate in Medical Skills (MS) Clinical with Preceptor training. Nurses will be assigned to a specific hospital unit where they will complete Clinical Preceptor Skills training under an assigned "preceptor". This training is critical to ensure nurses have critical hands-on skills prior to being assigned their own patients. New Graduate RNs will receive MS Clinical Preceptor training applicable to their assigned departments. Upon successful completion of new graduate nurse training, nurses will be qualified to take on the responsibilities of a staff RN.

All nurses will also receive one or more modules of MS Didactic training (classroom) in advanced medical care to ensure competency. MS Didactic training is essential for RNs to understand the clinical processes, and prepare the nurses for work in specialty areas of the hospital. The MS training program is designed to provide comprehensive training to include all aspects of skills and knowledge required for staff to be competent in their job functions.

The MS training curriculum is designed by the nationally-recognized organizations for the particular area of specialty: Emergency Nurse training utilizes the Emergency Nurses' Association (ENA) Core Curriculum; Critical Care training utilizes American Association of Critical Care Nursing (AACN) Program; and Perioperative training utilizes the Association of Perioperative Registered Nurses (AORN) Standards and Guidelines. Additional education and training will be provided by subject matter experts within the hospital.

The Panel has established a "blended" reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model. This blended rate, $22 per hour, will apply to both the Didactic and Preceptor modes of delivery. The standard class/lab rate for priority industries ($18 per hour) will apply to Computer Skills and Continuous Improvement training. (See Curriculum)

Computer-Based Training (CBT) – Commercial Skills

Training will be delivered as Computer-Based Training (CBT) as a supplement to the Medical Skills training either as a prerequisite or as a follow-up to ensure trainee's competency in the subject matter. CBT will allow trainees to train at their own pace and will be provided prior to or subsequent to a Classroom/Instructor-Led training to ensure learning/skills transfer has occurred. All trainees may receive up to 16 hours of CBT training. CBT is reimbursed at $8 per hour, per trainee. CBT will not exceed 50% of total training hours, per trainee.

Computer Skills (5%)

Training will be provided to all nurses. Training will be in advanced or intermediate Microsoft Office/Excel, SharePoint, and the Hospital's Electronic Medical Records (EMR) Application Skills. The focus of this training is connecting with patients through technology (patient satisfaction); including patents and family in the plan of care; learning financial impacts of electronic ordering and documenting; and ensuring accuracy for chart review and chart checks.

Continuous Improvement (10%)

Training will be provided to all trainees. Course topic such as Lean Six Sigma will help workers reduce waste, streamline processes and improve patient care and patient outcomes. Training

topics include Preceptor Skills, Team Building, CORE Measures, Critical Thinking, and Customer Service Skills. Trainees will learn appropriate tools to improve and standardize processes.

Retrainee - Job Creation

In support of job creation, the Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

With the expansion of specialty units and to meet the increasing patient demands, TVH will hire 35 RNs (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Hours Limitation

Retraining hours are capped at 200 per trainee. However, with the shortage of experienced nurses, TVH must hire inexperienced graduate nurses who are typically not prepared to assume sole responsibility for patient care. Often times, a New Grad RN trainee will receive up to 400 hours of training to complete the New Graduate Program. The successful completion of this program will qualify New Grad RNs to take on the responsibilities of a staff RN in a specific specialty unit.

The hospital is requesting a modification to allow 260 hours for approximately 32 New Graduate RNs who may require more extensive theory training and practical, clinical knowledge. The increase in the maximum training hours will also allow for a higher weighted average hours (150) for all trainees in Job Number 2. This modification to training hours was requested and granted in the prior ETP Agreement.

Commitment to Training

The hospital’s current annual company-wide training budget is approximately $950,000 which covers training for all job categories on an ongoing basis. TVH supports a patient and family centered care approach, and staff receives training specific to the hospital culture, mission, vision, and values.

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

TVH designated its new Director of Clinical Programs to administer, implement, and manage the ETP program. The hospital has also designated an administrative assistant to fully support the scheduling, enrolling, and tracking of training hours.

Impact/Outcome

Based on the growth in medical care services and patient volume, there is an ongoing need to ensure that there are trained and competent staff to provide quality patient care. Specialty trained nurses are limited in numbers and difficult to recruit. Providing training programs increases the ability to recruit staff and support retention of trained new nurses as a means of

career advancement. Without training, the hospital will need to utilize temporary contract staff, which can impact patient safety and quality of care. ETP-funded training will be utilized to provide additional and ongoing training to incumbent staff to enhance knowledge and skills which also enhances retention of experienced staff.

Substantial Contribution

Substantial contribution is not applicable to this proposal because TVH has not earned $250,000 or more in incumbent trainee training within the last five years, in prior agreements, at the same facility.

High Earner Reduction

The Panel enacted a High Earner Reduction (HER) of new projects for any parent company, including its subsidiaries, divisions, and branches regardless of facility that has earned more than $2 million in ETP funding over the last five years. The combined earnings in proposals of UHS entities within the last five years do not meet the $2 million threshold; therefore, no HER was applied.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by TVH under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0323	Temecula	5/5/14 – 5/4/16	$395,200	$74,797 incumbent $218,968 Job Creation (74%)*

*TVH documented in the ETP Tracking System 13,564 eligible training hours to equal $293,765 (74%) in potential earnings for 137 trainees. Per the Contract Status Report in the ETP Tracking System, the Hospital expects to earn $293,765 which is 74% of the Agreement amount. The Final Invoice Closeout has been submitted and is in process.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

Job Number 1: 8 – 200
Job Number 2: 8 – 200
Job Number 2: 8 – 260 (New Graduate RN only)

Trainees may receive any of the following:

MEDICAL SKILLS TRAINING – DIDACTIC

- Acid/Base Imbalances
- Acute Myocardial Infarction
- Advanced Cardiac Life Support (ACLS)
- Arterial Blood Gas (ABG) Interpretation
- Behavioral Health Nursing Skills
- Basic Life Support (BLS)
- Blood Transfusion Management
- Body Mechanics
- Care of the Bariatric Patient
- Care of the Cardiac Patient
- Care of the Cancer Patient
- Care of the Diabetic Patient
- Care of the Geriatric Patient
- Care of the Gynecological Patient
- Care of the Neurosurgical Patient
- Care of the Orthopedic Patient
- Care of Pediatric Patients (Acute Care, Intensive Care)
- Care of the Psychiatric Patient
- Care of the Surgical Patient
- Care of the Stroke Patient
- Central Lines Management
- Chest Tube Care & Management
- Code Blue Response & Procedures
- Critical Care Nursing Skills
- Decontamination Procedures
- Diabetes Care & Management
- Dysrhythmia Recognition & Interpretation
- Educating the Patient & Family
- EKG & Cardiac Monitoring
- Emergency Room Nursing Skills
- End of Life Care
- Equipment Skills (IV pumps, cardiac telemetry, vital signs, pulse-oximeter, ventilators, specialty beds and mattresses, etc.)
- Evidence Based Practices
- Fall Prevention
- Fluid and Electrolyte Imbalances
- Gastrointestinal Assessment and Management

- Hemodynamic Monitoring
- Infection Control
- Intra-Aortic Balloon Pump Therapy (IABP)
- Intra-Cranial Pressure Monitoring & Ventriculostomy
- Intravenous (IV) Insertion & Therapy
- Medical/Surgical Nursing Skills
- Medication Administration & Management
- Moderate Sedation
- Neonatal Resuscitation Provider (NRP)
- New Graduate Nursing Skills
- Nurse Orientation Training **(for New Grads only)**
- Nursing Diagnosis Skills
- Nursing Process Skills
- OB Patient and Imminent Delivery
- Oncology Nursing Skills
- Orthopedic Nursing Skills
- Ostomy & Continence Care
- Pain Management (Acute & Chronic)
- Patient Assessment & Care
- Pediatric Advanced Life Support (PALS)
- Peri-Operative Nursing Skills
- PICC Line Insertion
- Pre and Post-Operative Care
- Pressure Injury Prevention
- Rapid Response Skills
- Renal Assessment & Management
- Respiratory Assessment & Care
- Restraints
- Safe Patient Handling
- Surgical Nursing Skills
- Telemetry Nursing Skills
- Nutrition
- Transfer Techniques
- Triage Nursing Skills
- Ventilator and Tracheotomy Care
- Wound & Skin Care

MEDICAL SKILLS TRAINING – CLINICAL PRECEPTOR

- **Emergency Department Training**
  - Emergency Room Nursing Skills
  - Care of Imminent Delivery and Neonate
  - Care of the Cardiac Patient
  - Care of the Hypothermia Status Post Cardiac Arrest Patient
  - Care of the Neonate and Pediatric patient
  - Care of the Sepsis Patient
  - Care of the Stroke Patient
  - Crisis Prevention Intervention
  - Procedural Sedation

- Trauma
- Triage Nursing Skills
- Care of the Psychiatric Patient
- Safe Patient Handling Skills
- National Certification Exam Preparation

- **Intensive Care Unit/Critical Care Unit Training**
  - Critical Care Nursing Skills
  - Arterial Blood Gas Analysis and Interpretation
  - Care of the Cardiac Patient
  - Care of the Patient having Electro-Physiology Studies
  - Care of the Hypothermia Status Post Cardiac Arrest Patient
  - Care of the Neuro Patient
  - Care of the Patient having Cardiothoracic Surgery
  - Care of the Patient in Acute Respiratory Distress
  - Care of the Patient Requiring Continuous Renal Replacement Therapy
  - Care of the Post-Operative Cardiac Catheterization Patient
  - Care of the Sepsis Patient
  - Care of the Stroke Patient
  - End of Life Care
  - Hemodynamic Monitoring
  - Intra-Aortic Balloon Pump (IABP)Therapy
  - Intracranial Pressure Monitoring & Ventriculostomy
  - Management of Cardiac Output
  - Palliative Care
  - Patient Assessment & Care
  - Pre and Post-Operative Care
  - Pressure Injury Prevention
  - Safe Patient Handling Skills
  - Ventilator & Tracheotomy Care
  - Wound and Ostomy Care
  - National Certification Exam Preparation

- **Medical/Surgical/Telemetry Unit Training**
  - Medical/Surgical/Telemetry Nursing Skills
  - Cardiac Monitoring
  - Care of the Cardiac Patient
  - Care of the Neuro Patient
  - Care of the Post-Operative Catheterization Patient
  - Care of the Stroke Patient
  - Crisis Prevention Intervention
  - Dysrhythmia Interpretation
  - End of Life Care
  - Geriatric Nursing Skills
  - Intravenous Therapy
  - Medical/Surgical Nursing Skills
  - Medication Safety
  - Oncology Nursing Skills
  - Orthopedic Nursing Skills

- Palliative Care
- Patient Assessment & Care
- Pre and Post-Operative Care
- Pressure Injury Prevention
- Safe Patient Handling Skills
- Wound and Ostomy Care
- National Certification Exam Preparation

- **Operating Room and Post-Anesthesia Care Unit (PACU) Training**
  - Surgical Nursing Skills
  - Cardiothoracic Surgery Skills
  - Care of the Post Cardiac Cath Patient
  - Patient Assessment & Care
  - Post Anesthesia Care Skills
  - Pre and Post-Operative Care
  - Safe Patient Handling Skills
  - National Certification Exam Preparation

- **Cardiac Catheterization Services**
  - Cardiac Catheterization Nursing Skills
  - Cardiac Device Management
  - Care of the Cardiac Catheterization Patient
  - Care of the Patient having Electro-Physiology
  - Care of the STEMI Patient
  - Patient Assessment & Care
  - Pre & Post-Operative Care
  - Safe Patient Handling Skills
  - National Certification Exam Preparation

COMPUTER SKILLS

- Microsoft Office/Excel Skills (Intermediate and Advanced)
- SharePoint
- Electronic Medical Records Application Skills

CONTINUOUS IMPROVEMENT

- Lean Six Sigma
- Organization and Time Management Skills
- Patient and Family Centered Care Skills
- Preceptor Skills (train-the-trainer)
- Quality Improvement and Procedures Skills
- Team Building Skills
- Service Excellence
- Utilization Review
- Case Management/Discharge Planning
- Charge Nurse Training/Frontline Leadership Skills
- Communications Skills
- Conflict Resolution Skills
- CORE Measures
- Crisis Prevention Intervention (CPI)

- Critical Thinking Skills
- Culturally-Appropriate Care
- Customer Service Skills
- Documentation Skills

CBT Hours

0 – 16 **COMMERCIAL SKILLS**

- Use of Restraint and Seclusion (1.0)
- Radiation and MRI Procedures(1.75)
- Influenza (0.5)
- Recognizing Impaired Licensed Practitioners (0.5)
- Fluids and Electrolytes (1.0)
- Blood Transfusion (1.0)
- End of Life Care (2.0)
- Moderate Sedation (1.0)
- Recognizing and Responding to a Change in Patient Condition (1.0)
- Reducing Falls (2.0)
- National Patient Safety Goals(1.0)
- Preventing Healthcare Associated Infections (0.5)
- Preventing Central Line Associated Bloodstream Infection (0.5)
- Preventing Surgical Site Infection (2.0)
- Nursing Workflow (0.75)
- Orders Management (0.75)
- Early Heart Attack Care (0.5)
- Assessing Pain (1.0)
- Medication Safety(1.0)
- Universal Protocol (0.75)
- Teach-back Method for Patient Education (1.0)
- NIH Stroke Scale Training (3.0)
- Malignant Hyperthermia (0.75)
- Dysrhythmia Interpretation (2.0)
- Dysrhythmia Interventions (2.0)

Safety Training cannot exceed 10% of total training hours, per-trainee

Note: Training hours are capped at 200 total hours per trainee, regardless of the method of delivery. **Exception: For New Grad Registered Nurse (Job Number 2), training hours are capped at 260 total hours per trainee, regardless of the method of delivery.**

CBT is capped at 50% of total training hours, per trainee not to exceed 16 hours max

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Juniper Networks, Inc.

Agreement Number: ET17-0169

Panel Meeting of: August 26, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** L. Lai

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Technology/IT Technology/Other Priority Industry: ☒ Yes ☐ No
Counties Served:	San Francisco, Santa Clara	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		
Number of Employees in:	CA: 2,750	U.S.: 4,688	Worldwide: 9,707
Turnover Rate:	10%		
Managers/Supervisors: (% of total trainees)	19%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$576,000		$0	$0		$576,000

In-Kind Contribution:	100% of Total ETP Funding Required	$650,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp.	2,000	8 - 200	0 - 30	$288	$42.00
				Weighted Avg: 16			

Minimum Wage by County: $17.02 for San Francisco and Santa Clara counties.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupational Titles	Wage Range	Estimated # of Trainees
Engineer I		750
Engineer II		405
Sales Staff		100
Marketing Staff		107
Manufacturing Operations Staff		69
Operations Staff		32
Finance Staff		61
IT I		80
IT II		10
Manager/Supervisor		386

INTRODUCTION

Headquartered in Sunnyvale, Juniper Networks, Inc. (Juniper) develops and markets high-performance networking products including routers, switches, network management and security software. Juniper's networks support the world's top 100 service providers in all types of business segments, including internet/cable/satellite providers, cloud/data center providers, government agencies and financial institutions. Juniper provides networking solutions using a customer centric approach in delivering transactions, applications and services with a focus on new software-defined networking products. While the Company does not directly manufacture a product, it does have a unit that oversees the subcontracted manufacturers. This will be Juniper's first ETP Agreement.

The Company is eligible for standard ETP funding as a service provider facing out-of-state competition. The Company is also eligible for priority reimbursement as a NAICS eligible employer (computer system design).

PROJECT DETAILS

As our world moves to a more digitally connected environment, the need for high quality, top-performing networks and software is a necessity. In order for Juniper to provide top quality and technologically advanced networking products and software, training is pivotal to ensure every employee is up-to-date on the latest advancements in this fast-paced industry.

Training is designed to shorten cycle times, increase capacity, increase quality, and reduce costs. This will help Juniper improve quality processes, increase services/products, meet new demands for research and development of technological advancements, implement technological enhancements, and expand their existing client base.

Training Plan

Training will be delivered via class/lab, E-learning and Computer-Based Training (CBT) and will occur at the Company's locations in Sunnyvale and San Francisco.

Business Skills (65%): Training will be offered to all occupations. Topics include communication, presentation, executing change and project management. Training will provide employees with the skills and knowledge necessary to improve communication skills, make better presentation skills, and better position Juniper and its products to customers.

Computer Skills (20%): Training will be offered to Engineers, Sales, Marketing and IT Staff. Training will allow workers the skills in the newest technological advances, build job skills, and help continue to keep Juniper on the forefront in its market.

Continuous Improvement (15%): Training will be offered to all occupations. The courses will maximize sales, increase customer satisfaction, and boost efficiency within the organization.

Commitment to Training

Juniper confirms that ETP funds will not displace the existing financial commitment to training. The Company spends approximately $650,000 annually on training in new hire training, professional development, compliance and safety training, basic training skills, executive and director level trainings, and human resources training.

- Training Infrastructure

  The Director of Learning and the HR team will be responsible for overseeing administration and training delivery. An administrative subcontractor will assist with data reporting in the ETP's systems and progress monitoring. Juniper is ready to start training using qualified in-house trainers. If the need arises, the Company may utilize external training vendors.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

ADP in San Dimas assisted with development of this proposal at no cost.

ADMINISTRATIVE SERVICES

ADP will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Communication and Interpersonal Skills Training
  - o Advanced Presentation Skills
  - o Communication Essentials
  - o Conflict and Collaboration for Multi-Cultural Teams
  - o Conflict Resolution
  - o Dealing with Self & Others in Difficult Situations
  - o Effective Communication
  - o Effective Technical Presentations
  - o Engagement: Facilitating Individual, Team and Org Effectiveness
  - o Execution: Manage Change, Deliver Results
  - o Getting Things Done Through Influence
  - o Innovation: Harnessing Creativity, Deliver Results
  - o Management Essentials
  - o Managing Difficult Conversations
  - o Matrix Management and Organizational Swing
  - o Persuasion & Rapport
  - o Preparing Powerful Presentations
  - o Presentation Skills
  - o Project Management
  - o Strategic Thinking
  - o TeamWorks: 5 Essential Conversations of High-Performance Teams
  - o The Power of Recognition
- Marketing and Sales Skills Training
  - o Competitive Differentiation
  - o Customer Centricity
  - o Customer Insights
  - o Focus on Verticals
  - o Marketing Mix
- Technical Skills Training
  - o 3Q16 Technical Summit
  - o 3Q17 Technical Summit
  - o Introduction to Juniper Technology
  - o Mastering Juniper Systest
  - o Mastering Junos Development
  - o Network Automation 201 Certification

E-Learning Hours

0 - 102

BUSINESS SKILLS

- Marketing and Sales Skills Training
  - o 1Q17 Virtual Sales Summit
  - o 1Q18 Virtual Sales Summit
  - o 2Q17 Virtual Sales Summit
  - o 2Q18 Virtual Sales Summit
  - o 3Q16 Virtual Sales Summit
  - o 3Q17 Virtual Sales Summit
  - o 4Q16 Virtual Sales Summit
  - o 4Q17 Virtual Sales Summit

- Technical Skills Training
  - o 1Q17 Virtual Technical Summit
  - o 1Q18 Virtual Technical Summit
  - o 2Q17 Virtual Technical Summit
  - o 2Q18 Virtual Technical Summit
  - o 4Q16 Virtual Technical Summit
  - o 4Q17 Virtual Technical Summit

CBT Hours
0 – 30

BUSINESS SKILLS

- Communication and Interpersonal Skills Training
  - o Administrative Professionals: Interacting with Others (1hr)
  - o Basic Presentation Skills: Creating a Presentation (1hr)
  - o Basic Presentation Skills: Delivering a Presentation (1hr)
  - o Basic Presentation Skills: Planning a Presentation (1hr)
  - o Being a Receptive Communication Partner (1hr)
  - o Building Trust (1hr)
  - o Business Grammar: Sentence Construction (1hr)
  - o Business Writing: How to Write Clearly and Concisely (1hr)
  - o Communicating Across Cultures: Speaking and Listening Across Boundaries (1hr)
  - o Communicating Across Cultures (8hr)
  - o Communicating with Professionalism and Etiquette (1hr)
  - o Communication Skills and Project Management (1hr)
  - o Creating and Maintaining a Positive Work Environment (1hr)
  - o Dealing with Common Meeting Problems (1hr)
  - o Delivering a Difficult Message with Diplomacy and Tact (1hr)
  - o Developing Character for Decisiveness (1hr)
  - o Effective Team Communication (1hr)
  - o Essential Mentoring Techniques: Designing and Initiating Mentoring Programs (1hr)
  - o Feedback That Works (1hr)
  - o First Time Manager: Understanding a Manager's Role (1hr)
  - o Generating Creative and Innovative Ideas: Enhancing Your Creativity (1hr)
  - o Generating Creative and Innovative Ideas: Verifying and Building on Ideas (1hr)
  - o Getting Results without Direct Authority: Building Relationships and Credibility (1hr)
  - o Giving Constructive Criticism (1hr)
  - o Giving Feedback (1hr)
  - o Having a Difficult Conversation (1hr)
  - o Improving Your Emotional Intelligence Skills: Self-Awareness and Self-Management (1hr)
  - o Influence: Gaining Commitment, Getting Results (1hr)
  - o Interpersonal Communication: Being Approachable (1hr)
  - o Interpersonal Communication: Communicating Assertively (1hr)
  - o Interpersonal Communication: Communicating with Confidence (1hr)
  - o Interpersonal Communication: Listening Essentials (1hr)
  - o Interpersonal Communication: Targeting Your Message (1hr)
  - o Introduction to Business Analysis and Essential Competencies (1hr)
  - o Leadership Essentials: Building Your Influence as a Leader (1hr)
  - o Leading Teams: Building Trust and Commitment (1hr)
  - o Leading Teams: Dealing with Conflict (1hr)
  - o Leading Teams: Fostering Effective Communication and Collaboration (1hr)

- o Listening Essentials: Improving Your Listening Skills (1hr)
- o Listening Essentials: The Basics of Listening (1hr)
- o Management Essentials: Developing Your Direct Reports (1hr)
- o Managing Change: Building Positive Support for Change (1hr)
- o Managing Change: Sustaining Organizational Change (1hr)
- o Managing Conflict with Direct Reports (1hr)
- o Managing Conflict with Peers (1hr)
- o Managing Technical Professionals (1hr)
- o Monitoring and Improving Performance (1hr)
- o Negotiation Essentials: Avoiding Pitfalls in Negotiations (1hr)
- o Operations Management and the Organization (1hr)
- o Overcoming Challenges of Managing Top Performers (1hr)
- o Overcoming the Barriers to Decisiveness (1hr)
- o Preparing for Effective Business Meetings (1hr)
- o Preparing to Communicate Effectively at the 'C' Level (1hr)
- o Public Speaking Strategies: Confident Public Speaking (1hr)
- o Public Speaking Strategies: Preparing Effective Speeches (1hr)
- o Raising Sensitive Issues in a Team Environment (1hr)
- o Rebuilding Trust (1hr)
- o Receiving Feedback and Criticism (1hr)
- o Strategies for Communicating with Tact and Diplomacy (1hr)
- o Taking Action for Performing under Pressure (1hr)
- o Techniques for Communicating Effectively with Senior Executives (1hr)
- o The Impact of Situation and Style When Communicating with Diplomacy and Tact (1hr)
- o The Voice of Leadership: Effective Leadership Communication Strategies (1hr)
- o The Voice of Leadership: The Power of Leadership Messaging (1hr)
- o Workplace Conflict: Recognizing and Responding to Conflict (1hr)
- o Workplace Conflict: Strategies for Resolving Conflicts (1hr)
- o Writing for Technical Professionals: Effective Writing Techniques (1hr)

- Professional Development Tools Training
  - o Critical Thinking Essentials: Applying Critical Thinking Skills (1hr)
  - o Critical Thinking Essentials: What Is Critical Thinking? (1hr)
  - o Decision Making: The Fundamentals (1hr)
  - o Decision Making: Tools and Techniques (1hr)
  - o Personal Productivity Improvement: Managing Tasks and Maximizing Productivity (1hr)
  - o Personal Productivity: Self-Organization and Overcoming Procrastination (1hr)
  - o Problem Solving: Digging Deeper (1hr)
  - o Problem Solving: The Fundamentals (1hr)
  - o Professionalism, Business Etiquette and Personal Accountability (1hr)
  - o Time Management: Analyzing Your Use of Time (1hr)
  - o Time Management: Avoiding Time Stealers (1hr)
  - o Time Management: Planning and Prioritizing Your Time (1hr)
  - o Time Management: Too Much to Do and Too Little Time (1hr)
  - o Using Strategic Thinking Skills (1hr)
- Marketing and Sales Skills Training
  - o Architecture and Business Value of MX Family, vMX-BNG (.5hr)
  - o Commercial Sales Training – Total Available Market Role - Planning/Enabling/Driving Demand (1hr)
  - o Commercial Sales Training - Managing your Pipeline and Forecast (1hr)
  - o Commercial Sales Training – Sales Engineer Role - Planning/Enabling Team (1hr)

- o Commercial Sales Training - Total Available Market Role - Driving Demand (1hr)
- o Commercial Sales Training - Total Available Market Role - Enabling/Rewarding your Team and Partners (1hr)
- o Cross Provisioning Platform (.5hr)
- o Customer Advocacy: Enhancing the Customer Experience (1hr)
- o Customer Service over the Phone (1hr)
- o Customer-Focused Interaction (1hr)
- o Identifying and Managing Customer Expectations (1hr)
- o Industry Analysis - Porters 5 Forces (1hr)
- o Integrated Marketing Campaigns (1hr)
- o Introducing vMX (.5hr)
- o Selling Services (2hr)
- o Selling Software (2hr)
- o Social Media (1hr)
- o Software Licensing Framework Change (.5hr)
- o Tool-Assisted Speedrun for Dealmaker: Access and Navigation (.5hr)
- o Tool-Assisted Speedrun for Dealmaker: Account Planning at JNPR (1hr)
- o Tool-Assisted Speedrun for Dealmaker: Configuring your Account Plan (.5hr)
- o Tool-Assisted Speedrun for Dealmaker: Our Account Planning Platform (1hr)
- o Value Proposition (1hr)
- o Business Value of Express Path (.5hr)
- o Business Value of Product A (.5hr)
- o Business Value of QFX10000 (.5hr)
- o Business Value of QFX5100 (.5hr)
- o Business Value of Security in the Cloud Enabled Enterprise (.5hr)
- o Business Value of Switching in the Cloud Enabled Enterprise (.5hr)
- o Business Value of vSRX (.5hr)

- Finance Skills Training
  - o Auditing the Revenue Cycle (1hr)
  - o Basic Accounting Principles and Framework (1hr)
  - o Business Performance and Financial Measures in Six Sigma (1hr)

CONTINUOUS IMPROVEMENT

- Quality Training Skillset
  - o Basic Statistics and Graphical Methods for Six Sigma (1hr)
  - o Basic Statistics for Six Sigma (1hr)
  - o Introduction to Lean for Service and Manufacturing Organizations (1hr)
  - o ITIL® 2011 Edition Foundation: Continual Service Improvement (1hr)
  - o ITIL® 2011 Edition OSA: Incident Management Interactions (1hr)
  - o Lean Tools for Process Control in Six Sigma (1hr)
  - o Probability for Six Sigma (1hr)
  - o Six Sigma and Lean Foundations and Principles (1hr)
  - o Six Sigma Project Management Basics (1hr)
  - o Six Sigma Project Team Dynamics and Performance (1hr)
  - o Static Techniques and Test Design in Software Testing (1hr)
- Project Management Skills Training
  - o Adopting an Agile Approach to Project Management (1hr)
  - o Agile Planning: Project Initiating and Requirements Gathering (1hr)
  - o Agile Planning (1hr)
  - o Agile Project Management Essentials (1hr)
  - o An Overview of Agile Methodologies (1hr)
  - o Developing and Controlling the Project Schedule (1hr)

- o Identifying Project Risks (1hr)
- o Introduction to Program Management (1hr)
- o IT Project Management Essentials: Initiating and Planning IT Projects (1hr)
- o Managing Agile Software Development (1hr)
- o Managing and Controlling Stakeholder Engagement (1hr)
- o Managing Procurements (1hr)
- o Monitoring and Controlling Project Scope (1hr)
- o Overview of the Scrum Development Process (1hr)
- o Plan and Manage Project Communications (1hr)
- o Program Life Cycle and Benefits Management (1hr)
- o Project Management Fundamentals (1hr)
- o Project Management Overview (1hr)
- o Project Management Process Groups (1hr)
- o Project Requirements and Defining Scope (1hr)

COMPUTER SKILLS

- Programming Skills Training
  - o Advanced Git (1hr)
  - o Advanced Python (1hr)
  - o ANSI C Programming: Data Representation (1hr)
  - o ANSI C Programming: Introducing C (1hr)
  - o Apache Hadoop (1hr)
  - o Applications of Python (1hr)
  - o Beginner Git (1hr)
  - o C++11: Advanced Techniques and C++14 Preview (1hr)
  - o C++11: Programming Fundamentals (1hr)
  - o C++11: Programming with Boost (1hr)
  - o Getting Started with Ruby (1hr)
  - o Implementing OpenStack (1hr)
  - o Introducing Cloud Computing (1hr)
  - o Introduction to Algorithms and Data Structures (1hr)
  - o Introduction to Designing a Relational Database (1hr)
  - o Introduction to Eclipse (1hr)
  - o Introduction to Java EE 6 (1hr)
  - o Introduction to Ubuntu (1hr)
  - o Java SE7 Fundamentals: Introduction to Java (1hr)
  - o JavaScript Essentials: Dynamic Content and HTML5 (1hr)
  - o JavaScript Object Notation Essentials (1hr)
  - o Linux Kernel Compilation and Linux Startup (1hr)
  - o Linux Network Configuration (1hr)
  - o Linux Network Services (1hr)
  - o Linux Security (1hr)
  - o Microsoft SQL Server 2014: Manage, Maintain, and Troubleshoot (1hr)
  - o Oracle 12c Performance Tuning: Metrics and Monitoring (1hr)
  - o Perl Language Fundamentals (1hr)
  - o Programming and Deploying Apache Spark Applications (1hr)
  - o Programming in C++: STL I/O and Headers, Templates and Namespaces (1hr)
  - o Programming in C++: Structure and Data Types (1hr)
  - o Programming in C++: Working with Classes (1hr)
  - o Python Language Basics (1hr)
  - o Selenium and Java (1hr)
  - o Selenium and Python (1hr)
  - o Selenium Automated Web Testing Fundamentals (1hr)

- o Starting to Program with Perl (1hr)
- o UNIX Fundamentals: Files and Directories (1hr)
- o UNIX Fundamentals: Shell Scripting Basics (1hr)
- o Unix OS Fundamentals: An Introduction to Unix (1hr)
- o UNIX Shell Scripting Tools (1hr)
- o Web API Essentials (1hr)Web Design Enhancements (1hr)
- o Marketing Automation (1hr)
- o Network Automation 101 (4hr)

- Technical Skills Training
  - o Advanced Features of Selenium Automated Web (1hr)
  - o Architecture and Business Value of Junipers Cloud CPE Solution (.5hr)
  - o Architecture and Business Value of Junos Fusion (.5hr)
  - o Architecture for Product A (.5hr)
  - o Architecture for the MX Series 3D Router (.5hr)
  - o Architecture of Converged Super Core (.5hr)
  - o Architecture of Juniper Product (.5hr)
  - o Architecture of PTX1000 (.5hr)
  - o Architecture of QFX5200-32C & 64Q (.5hr)
  - o Architecture of Sky Advanced Threat Prevention (Argon) (.5hr)
  - o Architecture of SRX300 Series SRX550 and SRX1500 (.5hr)
  - o Architecture of SRX300 Series SRX550 and SRX1500 (v1.1) (.5hr)
  - o Architecture of the Express Path SRX5000 (.5hr)
  - o Architecture of the QFX10000 Series Switches (.5hr)
  - o Architecture of the vSRX Firefly Perimeter (.5hr)
  - o Being an Effective NPI Team Member (.5hr)
  - o CISA Domain: IS Operations, Maintenance, and Support - Part 2 (1hr)
  - o Cisco ICND1 1.1: Fundamentals of Networking (1hr)
  - o Cisco ROUTE 2.0: Implementing Basic BGP Operations (1hr)
  - o Cisco ROUTE 2.0: VPN Technologies (1hr)
  - o Cisco SWITCH 2.0: Basic Concepts and Network Design (1hr)
  - o Cisco SWITCH 2.0: Campus Network Security I (1hr)
  - o Cisco SWITCH 2.0: Configuring Layer 3 Redundancy with VRRP and GLBP (1hr)
  - o CompTIA Cloud+ CV0-001: Data Center Infrastructure (1hr)
  - o CompTIA Linux+ 2014 Powered By LPI: LX0-103: Devices and Filesystems (1hr)
  - o CompTIA Network+ 2012: Networking Concepts Part 1 (1hr)
  - o CompTIA Network+ 2012: Networking Concepts Part 2 (1hr)
  - o CompTIA Security+ SY0-401: Cryptographic Methods and Public Key Infrastructures (1hr)
  - o Configuring OpenStack (1hr)
  - o EMC ISM v2: Business Continuity, Backup, Replication and Archiving (1hr)
  - o EMC ISM v2: Data Center Environment (1hr)
  - o Fundamentals of Software Testing (1hr)
  - o Juniper Authorized Design Specialist—Branch (3hr)
  - o Juniper Authorized Design Specialist—Campus (5hr)
  - o Juniper Authorized Design Specialist—Data Center (7hr)
  - o Juniper Authorized Design Specialist—Service Provider Access and Aggregation (5hr)
  - o Juniper Authorized Design Specialist—Service Provider Core (3hr)
  - o Juniper Authorized Design Specialist—Service Provider Edge (6hr)
  - o Juniper Networks Sales Specialist Enterprise Routing (4hr)
  - o Juniper Networks Sales Specialist Firewall (4hr)

- o Juniper Networks Sales Specialist Qfabric (4hr)
- o Juniper Networks Sales Specialist Switching (4hr)
- o Juniper's Configurator Tool (2hr)
- o Juniper's Design Xpert tool (3hr)
- o Junos Operating System Highlights (1hr)
- o Overview of QoS in a Packet Switched Network (1hr)
- o QFX5100-24Q-AA Architecture (0.5hr)
- o SAP Administration (1hr)
- o Software Defined Networking for the Sales Engineer community (4hr)
- o Secure Development Lifecycle (2.5hr)
- o The Big Data Technology Wave (1hr)
- o Using Puppet: Implementation and Benefits (1hr)
- o VMware vSphere 5 - Part 1: Introduction to Virtualization (1hr)
- o VMware Workstation 7: Getting started with Virtual Machines (1hr)
- o Winning with the QFX5200 (.5hr)

- Computer Skills Training
  - o Addressing and Redistributing E-mail (1hr)
  - o Adobe Dreamweaver CC – Essentials (1hr)
  - o Configuring Lists, Libraries, E-mail, and Announcements in SharePoint 2013 (1hr)
  - o Creating and Populating a Database in Access 2013 (1hr)
  - o Creating and Using Control Charts in Six Sigma (1hr)
  - o Creating Workbooks, Worksheets, and Data in Excel 2013 (1hr)
  - o Customizing Options and Views in Excel 2013 (1hr)
  - o Data Search, Data Validation, and Macros in Excel 2013 (1hr)
  - o Formatting Cells and Worksheets in Excel 2013 (1hr)
  - o Formatting Data in Excel 2013 (1hr)
  - o Getting Started with Excel 2007 (1hr)
  - o Managing Your E-mail (1hr)
  - o Manipulating and Formatting Data and Worksheets in Excel 2007 (1hr)
  - o Microsoft PowerShell for Windows: Getting Started with PowerShell (1hr)
  - o Microsoft Windows 10 First Look: Configuration (1hr)
  - o Office 365: Working with Online Files and Calendars (1hr)
  - o Performing Calculations Using Functions in Excel 2013 (1hr)
  - o Presenting Data Using Conditional Formatting and Sparklines in Excel 2013 (1hr)
  - o Resource Management in Project 2013 (1hr)
  - o SAP Customer Relationship Management (1hr)
  - o Sharing and Linking Data, and Adding Office Apps to Excel 2013 (1hr)
  - o Skype for Business: New Features, Profile and Contacts (1hr)
  - o Using E-mail and Instant Messaging Effectively (1hr)
  - o Workflows, Collaboration and Analysis in SharePoint 2013 (1hr)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee.

RETRAINEE - JOB CREATION

Training Proposal for:

On-Time Air Conditioning and Heating, Inc. dba Service Champions

Agreement Number: ET17-0197

Panel Meeting of: August 26, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** C. Hoover

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee SET Job Creation Initiative Veterans HUA	Industry Sector(s):	Construction Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Alameda, Contra Costa, Placer, Santa Clara	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 188	U.S.: 188	Worldwide: 188
Turnover Rate:	18%		
Managers/Supervisors: (% of total trainees)	9%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$413,000		$0	$0		$413,000

In-Kind Contribution:	100% of Total ETP Funding Required	$609,322

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	140	8-200	0	$900	$21.28
				Weighted Avg: 50			
2	Job Creation Initiative SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	70	8-200	0	$3,000	$12.77
				Weighted Avg: 150			
3	Veterans Retainee SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	10	8-200	0	$1,100	$21.28
				Weighted Avg: 50			
4	Veterans Job Creation Initiative SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	20	8-200	0	$3,300	$12.77
				Weighted Avg: 150			

It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Numbers 1 & 3: (SET Priority) $21.28; Job Numbers 2 & 4: $14.19 Alameda, Contra Costa, Santa Clara counties; $12.77 Placer, Napa & Yolo County counties.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $2.08 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 & 3. Up to $0.77 per hour may be used to meet the Post-Retention Wage for Job Numbers 2 & 4.

Other Compensation: Incentive pay ("bonus"), which is a normal and recurring part of the Company's employee compensation for all occupations, may be used in addition to health benefits for some trainees to meet the ETP minimum wage. Over the previous 12 months, the bonus amount ranged from $0.00 - $29.62 per hour. The average bonus amount was $3.35 per hour. Approximately 38% of the staff from all occupations may need incentive pay, in addition to health benefits, to meet the ETP minimum wage.

OTA also has a formal Commission Plan that is a regular part of the compensation structure for Service Technicians/Installers, which is paid on a monthly basis and is based on a 4% commission rate for the sales achieved. Over the previous 12 months, the Commission amount ranged from $0.00 - $7.04 per hour. The average monthly Commission amount was $0.77 per hour.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Customer Service/Dispatch		14
Corporate Support/Operations Staff		18
Service Technician/Installer		83
Frontline Lead/Supervisor/Manager		10
Sr. Service Technician/Installer		15
Job Number 2 (Job Creation)		
Customer Service/Dispatch		6
Corporate Support/Operations Staff		6
Service Technician/Installer		50
Frontline Lead/Supervisor/Manager		8
Job Number 3 (Veterans)		
Customer Service/Dispatch		2
Corporate Support/Operations Staff		2
Service Technician/Installer		2
Frontline Lead/Supervisor/Manager		2
Sr. Service Technician/Installer		2
Job Number 4 (Veterans/Job Creation)		
Customer Service/Dispatch		4
Corporate Support/Operations Staff		4
Service Technician/Installer		10
Frontline Lead/Supervisor/Manager		2

INTRODUCTION

Founded in 2003, and headquartered in Pleasanton, On-Time Air Conditioning and Heating, Inc. dba Service Champions (OTA) (www.servicechampions.net) is a residential contractor that installs, services and maintains a wide variety of air conditioning, heating and indoor air quality products including thermostats, furnaces, heat pumps, duct work and insulation. OTA serves residential customers in 120 cities across Northern California.

OTA qualifies for funding under Special Employment Training (SET) guidelines as a priority industry specialty contractor not facing out-of-state competition.

PROJECT DETAILS

Since 2004, the Company has grown from 20 employees to almost 200, causing the need for expansion to its headquarters' location in Pleasanton. This facility will be expanded to include a large, dedicated training center. The Service Center, which is currently co-located within this

facility, will be moved to an off-site location. The Company will also be opening two new facilities, in Napa and West Sacramento.

Industry demand for heating, ventilation and air conditioning (HVAC) services is projected to increase in the next five years. This is due in part to the growing popularity of energy-efficient systems for home installation. ETP-funded training will allow the Company to provide skills-upgrade training for incumbent installers and technicians, and new hires, as needed, to stay current with new technologies and systems.

- Smart Equipment – A smart thermostat and equipment integration allows remote control of systems by the homeowner.

- ServiceMax - A new Enterprise Resource Planning (ERP) system with cloud capability will streamline activities across multiple departments such as Sales, Accounting, Dispatch, Warehouse, Installation, and Field Services.

- Avaya IP (Internet Protocol) Office- A new phone system that will securely integrate with the Company's software to streamline customer service calls. The new system also integrates with Salesforce/ServiceMax giving OTA's internal users direct access to the phone system within the software applications.

Retrainee - Job Creation

In support of job creation, the Panel is offering incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

OTA is expanding business capacity by expanding existing facilities and opening new facilities. The Company ultimately will fill 200 positions. In this proposal, OTA has committed to hiring 90 new employees (Job Numbers 2 and 4). OTA represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

The following training plan was created after completion of a formal needs assessment. Courses will be delivered through Class/Lab and E-Learning methods.

Business Skills (25%): Training will be offered to all occupations. Training will upgrade skills such as customer service/customer relationships, communication skills, dispatch procedures, new/upgraded product knowledge and service skills. In addition, training on equipment will help employees better assist residential customer service and dispatch functions.

Commercial Skills (40%): Training will be offered to Service Technicians/Installers, Frontline Lead, Supervisors and Managers. Trainees will receive courses related to serving residential customers with their cooling and heating needs. Training will include skills such as: residential indoor air quality, equipment diagnostics/maintenance, maintaining merchandise (inventory and warehouse skills) and residential smart equipment. Trainees will also be trained on Smart Equipment: installation and servicing.

Computer Skills (15%): Training will be offered to all occupations. The training will be provided based specifically on the systems that each individual trainee utilizes in their daily job

function. In addition, Intermediate/Advanced Microsoft Office (Word, Excel and PowerPoint) and tablet computer application software training will be delivered.

Continuous Improvement (20%): Training will be offered to all occupations. The goal is to improve OTA's efficiency and productivity by implementing improved processes throughout the organization. As the Company continues to grow and add new products and technologies, skills such as change management, leadership skills, process mapping/process improvement, project management, and time management will help the Company work efficiently in an on-time environment.

Commitment to Training

OTA represents that ETP funds will not displace the existing financial commitment to training. The Company's training budget is approximately $568,000 for 2016. The Company provides new hire orientation; Cal OSHA required training, ladder safety, lifting safety, hydration on-the-job training and sexual harassment prevention training.

In addition, the Company will be providing CPR certification training to all of its Technicians and Installers. Mandatory training is delivered company-wide (e.g. – Sexual Harassment & Cal OSHA), but some training may be department or job-specific training. OTA delivers training through various methods- classroom settings, lab settings, via on-the-job training and by using E-Learning for the company's satellite offices. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

A Vice President will manage the project internally along with support from the Company's Department of Human Resources. The Company recently hired a Training Manager to assist with the creation of a new training curriculum and to expand its in-house training capabilities. OTA has also hired an experienced third party administrator, Training Funding Partners, to assist with administration.

High Unemployment Area

The 14 trainees in Job Numbers 2 & 4 work in Yolo County, High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. However, OTA is not asking for a wage modification.

Impact/Outcome

ETP funding will support OTA's efforts to hire and train new employees. In addition, it will support training for employees the Company would not be able to reach without funds and expansion of its in-house training.

Special Employment Training

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period. Job Creation trainees qualify at the New Hire Standard Minimum Wage.

The Panel may modify the minimum wage requirement for companies in priority industries, such as construction, up to 25% below the state average hourly wage ($21.28). OTA is requesting this modification.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. OTA appreciates the qualities and skills that veterans gain from their military service. In this proposal, the training plan reflects 30 Veteran trainees that will receive ETP funded training, 10 Veteran trainees in Job Number 3 and 20 Veteran Job Creation trainees in Job Number 4.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

OTA retained Training Funding Partners (TFP) in Fountain Valley to assist with development of this proposal for a flat fee of $24,600.

ADMINISTRATIVE SERVICES

OTA also retained TFP to perform administrative services in connection with this proposal for 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Service/Customer Relationships
- Business Processes & Procedures
- Communication Skills
- Dispatch Procedures
- Equipment and Industry Overview
- Finance/Accounting Skills
- Residential Heating and Air Conditioning Industry/Equipment Overview (non-technicians)
- Maintenance/Membership Programs
- Sales/Marketing Skills
- New/Upgraded Product Knowledge and Service Skills
- Writing Quotes/Financing

COMMERCIAL SKILLS

- Equipment Diagnostics/Maintenance
- Electricity/Voltage & Schematics
- Heat Pumps
- Maintaining Merchandise Inventory/Warehouse Skills
- Mechanical Refrigeration
- Principles of Electronics
- Residential Ducting/Installations
- Residential Environment Technology/Controls
- Residential Indoor Air Quality
- Residential Smart Equipment

COMPUTER SKILLS

- Avaya Phone System/Technology Integration
- Call Center/Dispatch Application Skills
- Intermediate/Advanced Microsoft Office (Word, Excel, PowerPoint)
- Paycom Payroll System
- ServiceMax Software Application/Enterprise Resource Planning System (ERP)
- Tablet Computer Applications

CONTINUOUS IMPROVEMENT

- Change Management Skills
- Leadership Skills
- Problem Solving Skills
- Process Mapping/Process Improvement Skills
- Project Management Skills
- Root Cause Analysis/Troubleshooting
- Time Management Skills

Safety Training will be limited to 10% of total training hours per-trainee

E-Learning Hours

8 – 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Service/Customer Relationships
- Business Processes & Procedures
- Communication Skills
- Dispatch Procedures
- Equipment and Industry Overview
- Finance/Accounting Skills
- Residential Heating and Air Conditioning Industry/Equipment Overview (non-technicians)
- Maintenance/Membership Programs
- Sales/Marketing Skills
- New/Upgraded Product Knowledge and Service Skills
- Writing Quotes/Financing

COMMERCIAL SKILLS

- Equipment Diagnostics/Maintenance
- Electricity/Voltage & Schematics
- Heat Pumps
- Maintaining Merchandise Inventory/Warehouse Skills
- Mechanical Refrigeration
- Principles of Electronics
- Residential Ducting/Installations
- Residential Environment Technology/Controls
- Residential Indoor Air Quality
- Residential Smart Equipment

COMPUTER SKILLS

- Avaya Phone System/Technology Integration
- Call Center/Dispatch Application Skills
- Intermediate/Advanced Microsoft Office (Word, Excel, PowerPoint)
- Paycom Payroll System
- ServiceMax Software Application/Enterprise Resource Planning System (ERP)
- Tablet Computer Applications

CONTINUOUS IMPROVEMENT

- Change Management Skills
- Leadership Skills
- Problem Solving Skills
- Process Mapping/Process Improvement Skills
- Project Management Skills
- Root Cause Analysis/Troubleshooting
- Time Management Skills

Safety Training will be limited to 10% of total training hours per-trainee

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.

RETRAINEE - JOB CREATION

Training Proposal for:

Palo Alto Networks, Inc.

Agreement Number: ET17-0173

Panel Meeting of: August 26, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** L. Lai

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative Veterans	Industry Sector(s):	Technology/IT Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Santa Clara	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 1,239	U.S.: 1,569	Worldwide: 3,343
Turnover Rate:	2%		
Managers/Supervisors: (% of total trainees)	19%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$738,966		$0	$0		$738,966

In-Kind Contribution:	100% of Total ETP Funding Required	$3,148,300

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills Mgmt. Skills	894	8 - 200	0	$414	$18.00
				Weighted Avg: 23			
2	Job Creation Retrainee Priority Rate	Business Skills Mgmt. Skills	730	8 - 200	0	$500	$18.00
				Weighted Avg: 25			
3	Veterans Job Creation Retrainee Priority Rate	Business Skills Mgmt. Skills	7	8 – 200	0	$550	$18.00
				Weighted Avg: 25			

Minimum Wage by County: Santa Clara County: Job #1-$17.02; Jobs #2 and #3 - $14.19
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupational Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1 – RETRAINEES		
Sales 1		77
Sales 2		152
Sales 3		4
Service 1		77
Service 2		15
Administrative 1		54
Administrative 2		74
Administrative 3		6
Operations 1		54
Operations 2		138
Operations 3		17
Management 1		54

Management 2		128
Management 3		15
Director 1		23
Director 2		6
JOB NUMBER 2 – JOB CREATION		
Sales 1		33
Sales 2		65
Sales 3		2
Service 1		33
Service 2		7
Administrative 1		77
Administrative 2		107
Administrative 3		17
Operations 1		77
Operations 2		197
Operations 3		25
Management 1		21
Management 2		58
Management 3		8
Director 1		2
Director 2		1
JOB NUMBER 3 – VETERANS JOB CREATION		
Sales		2
Administrative		2
Operations		2
Management 1		1

INTRODUCTION

Located in Santa Clara, Palo Alto Networks, Inc. (PAN) offers a network security platform that prevents cyber breaches on devices such as mobile phones, ATMs and gas pumps.

Information is shared across security functions system-wide, and designed to operate in increasingly mobile, modern networks. By combining network, cloud and endpoint security with advanced threat intelligence in a natively integrated security platform, the Company's products enable all applications and deliver highly automated, preventive protection against cyber threats at all stages in the attack lifecycle. The Company has offices worldwide as well as in New York, Texas, Virginia.

PROJECT DETAILS

The network security industry is continually challenged by new cyber-attack methods. PAN must continue to detect and prevent advanced cyber-attacks while allowing its customers to safely enable applications in the digital world. To remain competitive PAN must develop test and deploy new technologies and measures to fight cyber-attack.

PAN continues to provide extensive technical training to engineers and developers to develop technology and processes to combat cyber-attacks. As technology is deployed, the non-technical employees must be retrained to implement, sell, and service the products. In addition, the Company plans to expand business capacity by hiring 730 Job Creation trainees and 7 Veterans into existing functions. These new employees will need training on PAN's products, technology, and processes.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

In the past two years, PAN experienced an average 53% revenue growth and increased its global headcount by approximately 2,400 including 850 new employees in California. The Company anticipates continued growth and new employees within the term of the contract.

PAN has committed to hiring 730 new employees (Job Number 2). The population includes employees in various occupations that support the business. Their date-of-hire will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

For the past 5 years, Palo Alto Network has experienced a rolling average of >40% growth year over year and the company expects the trend to continue for the next few years. The company believes it has a proven track record of developing new hires to meet the demands of the business – as continued growth and success in the industry demonstrates. The Sales Support group targets a 30 to 45 day training period and the Pre-Sales group targets completion within 30 days. New hires are prioritized to complete training as early as possible, as it has a direct impact on their success. The low involuntary turnover rate in the state is another indicator that the Company has employees that are performing very successfully.

The Company broke ground in September 2015 for a new headquarters in Santa Clara. The new 630,000 square foot office will be ready for occupancy in June 2017 and able to accommodate more than 5,000 workers, giving PAN the space needed for future growth. Hiring of new employees (Job Number 2) has begun and is not contingent on the completion of the new facility in Santa Clara. Newly-hired employees will be housed at PAN's current facilities until the new campus is completed.

Veterans Program

PAN is committed to hiring and training seven Veterans under this proposal (Job Number 3). The Panel has established a higher reimbursement rate and other incentives for training California veterans. [Note: All Veteran trainees are classified as Job Creation and will be hired under the benchmark period set forth above under Retrainee-Job Creation].

Training Plan

All training will be conducted in a class/lab setting at the Santa Clara facility.

Business Skills (91%): Training will be offered to all occupations. Topics include product knowledge, communication, marketing/sales, problem solving, presentation, strategic planning, and customer service and support. Training will improve customer service and enable employees to manage overall business processes more effectively.

Management Skills (9%): Training will be offered to Management Staff to improve their managerial skills. Trainees will learn to become better leaders and coach staff members.

Commitment to Training

PAN's annual training budget is estimated to be $2.5-$3.5M annually for California. Training offered in the past includes onboarding, compliance training, State and Federal mandated training, IT training and engineering training. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  PAN's Talent Development team, consisting of four full-time staff, will administer the project. A team of in-house trainers and outside vendors, and LMS administrators will be involved in scheduling training events, delivering training and tracking attendance. The Company also continues to add development resources every year. In the Talent Development organization, 2 new employees were added this past fiscal year and another 2 employees will be added in the next quarter for a total of 6 dedicated resources for employee development initiatives. An administrative subcontractor will assist with data reporting in the ETP's systems and assist with contract management and coordination.

Record Keeping

PAN will use an LMS for record keeping purposes. ETP staff has reviewed and approved the LMS.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

PAN retained Welsh Advisors, Inc. in Orange to assist with development of this proposal at no cost.

ADMINISTRATIVE SERVICES

Welsh Advisors, Inc. will also perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Acumen
- Business/Technical Writing Skills
- Coaching Skills
- Communication Skills
- Conflict Resolution Skills
- Critical Thinking
- Customer Service/Support
- Delegation Skills
- Effective Meeting Management
- Goal Setting
- Human Resources
- Leadership Skills
- Managing Multiple Priorities
- Marketing/Sales Techniques
- Organizational Skills
- Performance Management
- Presentation Skills
- Problem Solving
- Product Knowledge
- Product Solutions
- Project Management
- Strategic Planning
- Team Development/Team Building
- Winning by Influencing
- Written Communications Skills

MANAGEMENT SKILLS (For Managers Only)

- Business Strategies
- Coaching and Mentoring
- Critical Thinking for Managers
- Performance Management
- Situational Leadership
- Strategic Planning
- Talent Management

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Aerojet Rocketdyne, Inc.

Agreement Number: ET17-0191

Panel Meeting of: August 26, 2016

ETP Regional Office: Sacramento **Analyst:** K. Mam

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Veterans	Industry Sector(s):	Aerospace and Defense Engineering Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	Sacramento, Los Angeles, Ventura	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No Sheet Metal, Air, Rail, Transportation Workers Local Union 105; International Brotherhood of Electrical Workers Local Union 2295; International Brotherhood of Teamsters Local Union No. 986		

Number of Employees in:	CA: 2,652	U.S.: 4,796	Worldwide: 4,797
Turnover Rate:	4%		
Managers/Supervisors: (% of total trainees)	7%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$748,000		$95,890 (30% Jobs 1 & 3)	$0		$652,110

In-Kind Contribution:	100% of Total ETP Funding Required	$1,176,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate (Rancho Cordova)	Mfg. Skills, Computer Skills, Cont. Imp., Business Skills, HazMat, HAZWOPER, Advanced Tech, OSHA 10/30	460	8-200	0-100	*$428	$18.60
				Weighted Avg: 34			
2	Retrainee Priority Rate	Mfg. Skills, Computer Skills, Cont. Imp., Business Skills, HazMat, HAZWOPER, Advanced Tech, OSHA 10/30	640	8-200	0-100	$612	$18.60
				Weighted Avg: 34			
3	Veterans Priority Rate Retrainee (Rancho Cordova)	Mfg. Skills, Computer Skills, Cont. Imp., Business Skills, HazMat, HAZWOPER, Advanced Tech, OSHA 10/30	50	8-200	0-100	*$523	$18.60
				Weighted Avg: 34			
4	Veterans Priority Rate Retrainee	Mfg. Skills, Computer Skills, Cont. Imp., Business Skills, HazMat, HAZWOPER, Advanced Tech, OSHA 10/30	50	8-200	0-100	$748	$18.60
				Weighted Avg: 34			

*Reflects Substantial Contribution

Minimum Wage by County: Job Numbers 1 & 3: $16.10 per hour for Sacramento County

Job Number 2 & 4: $16.48 per hour for Los Angeles County; $15.60 per hour for Ventura County

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe

Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 & 2		
Corporate Support Staff		98
Engineering Staff		210
Sr. Engineering Staff		155
Information Technology Staff		35
Sr. Information Technology Staff		9
Manufacturing Operations Staff		220
Sr. Manufacturing Operations Staff		45
Operations Support Staff		90
Sr. Operations Support Staff		35
Quality Assurance Staff		95
Sr. Quality Assurance Staff		35
Supervisor/Manager/Director		73
Job Numbers 3 & 4 (Veterans)		
Corporate Support Staff		2
Engineering Staff		30
Sr. Engineering Staff		5
Information Technology Staff		5
Sr. Information Technology Staff		1
Manufacturing Operations Staff		20
Sr. Manufacturing Operations Staff		5
Operations Support Staff		10
Sr. Operations Support Staff		5
Quality Assurance Staff		5
Sr. Quality Assurance Staff		5
Supervisor/Manager/Director		7

INTRODUCTION

Aerojet Rocketdyne, Inc. (Aerojet Rocketdyne)(www.rocket.com), a wholly-owned subsidiary of Aerojet Rocketdyne Holdings, Inc. (formerly GenCorp, Inc.), provides propulsion and energetics to the space, missile defense, strategic, tactical missile and armaments to the Aerospace and Defense industry. Aerojet Rocketdyne is headquartered in Rancho Cordova, with facilities in Folsom, Canoga Park, and Vernon. The Company is applying for training funds on behalf of itself and its affiliate Easton Development Company, LLC a wholly-owned subsidiary of Aerojet Rocketdyne Holdings, Inc.

The Company has locations nationwide with operations in Japan. Training under this proposal will be delivered to the four facilities in California.

PROJECT DETAILS

This is Aerojet Rocketdyne's second ETP Agreement within the last 5 years. In the previous proposal, the Company focused on integrating the workforce of two companies (Aerojet and Rocketdyne) and assimilating all systems, processes and procedures. Since the implementation of its Total Quality Management System, Aerojet Rocketdyne Business Operating System (ARBOS), and their Oracle ERP System, the Company has discovered areas for improvement. Training in this proposal will focus on ensuring that both systems are being used to fullest capacity. Although training topics are similar to prior Agreements, in no case will a trainee repeat the same training previously delivered.

The Company has recently secured several new contracts that will expand existing workloads and will require higher production capacity. The following contracts will require Aerojet Rocketdyne's staff to receive extensive training:

- Orbital Sciences Corporation – The Company will deliver XR-5 electric propulsion subsytems over the next three years for its orbit communications satellite platform.

- NASA – The Company will develop a high-power electric propulsion system to enable key elements of NASA's plans for exploration of cis-lunar space and Mars.

- U.S. Air Force – the Company has a partnership with the United Launch Alliance on a new rocket engine to launch military payloads into Earth's orbit. This AR1 engine will replace the Russian-built RD-180 engines currently used for launches of Atlas V rockets. The Company's Rocket Shop was also selected to develop technologies that may be used to replace the capabilities of the current Minutemen III Propulsion System Rocket Engine (PSRE) in a new future system. The two-year study will evaluate various advanced technology propulsion systems.

In addition, new U.S. based companies such as SpaceX and Blue Origin have recently emerged creating competition for Aerojet Rocketdyne along with foreign entities that offer products at lower prices. The Company has invested time and resources to evolve additive manufacturing technology to meet the stringent requirements of rocket engine and defense system applications. This will allow the Company to incorporate the technology into production programs to significantly reduce lead times, making its products more affordable and enabling new approaches to design previously not feasible due to the limitations of traditional manufacturing. Training will enable the Company to remain at the forefront of this developing technology to deliver high-performing, affordable propulsion systems.

Union Support

Workers are represented by Sheet Metal, Air, Rail, Transportation Workers Local Union 105; IBEW Local Union 2295; and International Brotherhood of Teamsters Local Union 986. Letters of support for this training project have been received.

Training Plan

Training will be delivered via classroom/laboratory, E-Learning and Computer-Based Training (CBT) methods. In-house subject matter experts and external training vendors may be utilized to deliver training in the following:

Manufacturing Skills (30%): Training will be offered to all occupations, however, the majority will be Engineers, Manufacturing Operations, Operation Support and Quality Assurance Staff. Training will provide workers with new and upgraded capabilities to build new products, meet

new customer requirements, and quality standards. Training topics include Additive Manufacturing Metallagraphy, Advanced Geometric Dimensioning & Tolerancing, Digital Radiography Skills and Lean Manufacturing.

Computer Skills (20%): Training will be offered to all occupations. Training will allow workers to utilize the complex systems required by the Company to perform their jobs and increase their knowledge and skills. Training topics include Maestro ERP Next Level System Skills, Fiber Graphix Prowinder Software, Weibull Analysis and Resource Planning Extract Tool.

Continuous Improvement Skills (15%): Training will be offered to all occupations. Training will insure the efficiency of the Company's operations to remain price competitive. Training topics include Leadership Skills, Quantitative Methods, Six Sigma Skills, and Total Quality Management (ARBOS AR-Business Operating System).

Business Skills (10%): Training will be offered to all occupations. Training will enable staff to be more efficient and effective. Training topics include Finance/Accounting/Budgeting, Communication, Conflict Management and Business Development Skills.

Hazardous Material (5%): Training can be offered to all occupations; however, the majority will be Manufacturing Operations, Operation Support and Quality Assurance Staff. Training will allow the workers to operate in an appropriate manner when handling hazardous materials and conditions. Training topics include Air Quality, Global Fire Protection Training, Hazard Communication and Radiation Protection.

Advanced Technology (AT) (15%): Training will be delivered to Engineering, Information Technology and Quality Assurance Staff. AT Skills is crucial to remain up-to-date with complex technology development and designs necessary for the production of new products that power the propulsion systems. AT training is intended to foster a high level of innovation and product development to fuel the next generation of aerospace manufacturing. Training will focus on sophisticated equipment and systems such as CAD/Creo Design Tools, IBM Rational Rhapsody System, Matlab/Simulink Modeling System and Phoenix Integration ModelCenter Tool.

The Company estimates that cost associated with this specialized training will range from $75 to $200 per hour, per trainee, depending on the subject matter. The trainer-to-trainee ratio is 1:10 for AT, to allow in-depth coverage and personal attention from the instructor.

Certified Safety Training (5%):

<u>OSHA 10/30:</u> This training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

<u>Hazardous Waste Operations and Emergency Response Standard (HAZWOPER):</u> This training is a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom or CBT training, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. Trainees

will not receive 40 hours of HAZWOPER training unless they work full time onsite at the clean-up location.

Hazardous Materials (HAZMAT): This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from "first responder" to "incident commander." It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, all occupations will receive up to 24 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, the certification entity has not been determined yet.

Computer-Based Training (CBT)

CBT is capped at 50% of total training hours per trainee. CBT will be provided to supplement class/lab. Trainees in Job Numbers 1-4 will receive between 0-100 hours of CBT.

Commitment to Training

Aerojet Rocketdyne's training budget for the California facilities is approximately $4,500,000. The Company provides training in beginner Microsoft Applications, basic internet navigation skills, anti-harassment, company orientation, performance appraisal skills, violence in the workplace, ethics training and labor relations training topics, first/aid/CPR, ergonomics, fire safety training, basic OSHA safety training and training on Company benefits. The Company also provides an extensive on-the-job training at its own expense. Reimbursement for formal education through a tuition reimbursement program is also provided and continuing education is covered for employees who attend industry specific conferences.

ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  The Company has assigned a main contact within its learning organization to oversee all administration of the ETP Program. There is additional support staff assigned to assist with the project. It has a large staff of training administrators responsible for ensuring the training is tracked in the LMS. Additionally, the Company has engaged the services of a third-party administrator with extensive ETP administration experience to complete the project successfully.

Training of Executive Level Staff

The proposed Agreement includes training for the occupational title of Director. The Company represents that the Director(s) included in the ETP training plan are considered middle management - not part of the Executive Team or policy makers.

Impact/Outcome

Training will include certification in the following:

- CMMi Level 3 Software

- Project Management Skills
- Eddy Current Instrument
- 30-K Forklift Operator
- Standup Electrical Forklift Operator

Nanotechnology

Aerojet Rocketdyne designs nanomaterials that are used in the production of its propulsion systems, which provides different molecular structures, physical sizes of component, chemical functionality and other capabilities. The Company invests significantly in the research, design and implementation of advanced nano materials for use in manufacturing its jet propulsion systems.

Substantial Contribution

Aerojet Rocketdyne is a repeat contractor with payment earned in excess of $250,000 and a former Substantial Contribution at the 15% level, at the Rancho Cordova facility, within the past five years. (See Active/Prior Project Table.) Accordingly, reimbursement for trainees at this facility (Job Number 1 and 3) will be reduced by 30% to reflect the Company's $95,890 Substantial Contribution to the cost of training.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans.

Over 10% of Aerojet Rocketdyne's workforce is comprised of veterans. The Company is actively working with organizations and job placement firms that seek to match veterans with its employment opportunities. The Company participates in veteran-focused job fairs, online recruiting events and conducts direct outreach recruitment activities through associations such as Hero's to Hired (H2H.jobs), Marines for Life Networking Program, and Work for Warriors Program. There will be approximately 100 Veterans being trained under this proposal.

Individuals with Disabilities

The No More Barriers program, recently adopted by the Panel, is designed to encourage California employers in their effort to "recruit, hire, train and retain" workers with disabilities. ETP funding will be available to train these workers, along with other staff who support the effort. Employers that hold federal contracts are particularly likely to train these workers, due to requirements under Section 503 of the Rehabilitation Act of 1973.

Aerojet Rocketdyne is subject to 503 compliance requirements and maintains an Affirmative Action Program for Covered Veterans and Persons with Disabilities. These workers and supporting staff will receive training in special courses for "Individuals with Disabilities" (See Exhibit B). Trainees in multiple occupational titles may receive this coursework, under Job Numbers 1 – 4.

The Company expects to train approximately 13 workers with disabilities; the actual trainee count will be reported to ETP at or before fiscal closeout.

Learning Management System

Staff has reviewed and approved Aerojet Rocketdyne's use of a Learning Management System for recordkeeping.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by Aerojet Rocketdyne under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET15-0260	$468,662	10/01/14 – 09/30/16	806	952	0

Based on ETP Systems, 28,833 reimbursable hours have been tracked for potential earnings of $468,662 (100% of approved amount). 952 trainees are pending review for placement. The Contractor projects final earnings of 100% based on training currently committed to by employers.

PRIOR PROJECTS

The following table summarizes performance by Aerojet Rocketdyne under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0189	Rancho Cordova, Folsom, Vernon, Canoga Park	10/22/12 – 10/21/14	$555,000	$435,146 (78%)

DEVELOPMENT SERVICES

Training Funding Partners in Fountain Valley assisted with development for a flat fee of $17,500.

ADMINISTRATIVE SERVICES

Training Funding Partners will also perform administrative services for a fee not to exceed 11% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab/E-Learning Hours

8-200 Trainees may receive any of the following:

MANUFACTURING SKILLS

- Additive Manufacturing Metallagraphy
- Advanced Geometric Dimensioning & Tolerancing
- Blue Print Reading/Drawings
- Civil/Structural Engineering Design
- Construction of Engineering Drawings
- Digital Radiography Skills
- Eddy Current Instrument/Certification
- Electrical Systems
- Engineering Design Skills
- Equipment Operation/Maintenance Skills
- Functional Gaging
- Hydraulic/Pneumatic Pressure Test
- Lathing
- Lean Manufacturing
- Manufacturing Operations Skills
- Material Handling/Testing
- Metallurgy for Non Destructive Testing
- Methodology and Tool Overview
- Next Generation Installations
- Optical Microscopy Skills
- Phased Array Ultrasonic Testing
- Power, Grounding and Lighting Design
- Production Metrology
- Soldering Skills
- Turnback Process – Tool

COMPUTER SKILLS (Advnaced/Intermediate Only)

- Calypso Software Application Skills
- CMMi Level 3 Software Certification
- Computed Tomography Skills
- Computer-Aided Design and Drafting
- Delmia Manufacturing Execution System
- Engineering/Modeling Software Application Skills
- Fiber Graphix Prowinder Software
- Geometric Dimensioning and Tolerancing Software
- Hyperion System Skills
- IBM Rhapsody/Rational Design System Skills
- MS Office Skills
- Introduction to Unigraphics
- Maestro ERP Next Level System Skills
- Microframe Project Manager Software Skills
- Microsoft Access
- Microsoft Project Application Skills

- Microsoft SharePoint Application Skills
- Microsoft Visio
- MPM Extract Tool (Multi Stage Picking Out Method)
- Oracle – Business Intelligence Publisher
- Programming Skills
- Resource Planning Extract Tool
- Server Management Skills
- Software Engineering Process
- Sub Total System
- Weibull Analysis
- Windchill System Skills

CONTINUOUS IMPROVEMENT

- Causal Analysis and Defect Prevention
- Change Management Skills
- Earned Value Management/Earned Value System
- Leadership Skills
- Project Management Skills/Certification
- Quantitative Methods
- Risk Probabilities/Analysis
- Six Sigma Skills
- Strategic Planning Skills
- Teamwork/Leading Teams
- Time Management Skills
- Total Quality Management (ARBOS AR-Business Operating System)

BUSINESS SKILLS

- Advanced Communication Skills
- Business Development/Sales Skills
- Business Systems/Estimating Methods
- Business/Technical Writing Skills
- Conflict Management Skills
- Decision Making Skills
- Documentation/Record Control
- Effective Presentation Skills
- Export Training
- Finance/Accounting/Budgets
- Individuals with Disabilities
    - Accessibility
    - Disability Sensitivity and Awareness
    - Employment Laws: Disability and Discrimination
    - Leading a Disability Inclusive Workforce
    - Recruiting, Interviewing and Hiring Applicants with Disabilities
- Industry Specific Regulations/Standards
- Meeting Management Skills
- Preparing Proposals
- PRICE True Planning
- Project/Materials Costing
- Subcontract Management Skills
- Train-the-Trainer Skills

- Understanding Contracting Types

HAZARDOUS MATERIALS

- Air Quality
- Global Fire Protection Training
- Hazard Communication
- Hazardous Materials/Waste Handling/Disposal
- Penetrant Inspection Skills
- Pressurized Systems
- Propellants
- Radiation Protection

0-40 **HAZWOPER**

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10 (requies 10hr completion)
- OSHA 30 (requies 30hr completion)

AT Hrs

0-200 **ADVANCED TECHNOLOGY**

- Additive Manufacturing/Metallagraphy
- Advanced Calypso Software Application Skills
- CAD/Creo Design Tools
- Certified Systems Modeling Accelerator SysML training
- CMMi Level 3 Software Certification
- Electric Propulsion Design Skills
- IBM Rational Rhapsody System Skills
- IBM Rational Server Administration
- Igniter Principals
- Intercax Syndeaia
- Liquid Rocket Motor Design
- Lithium Ion Technology Design Considerations
- Matlab/Simulink Modeling
- Model Based Systems Engineering
- Nano Materials/Technology Research/Design/Implementation
- Phoenix Integration ModelCenter Tool
- Polarized Light Microscopy
- Programming Skills
- Rocket Engine/Rocket System Design Skills
- Rocket Test Fundamentals
- Software Engineering/Configuration
- Software Quality Assurance/Testing
- Software Requirements/Design
- Solid Rocket Motor Design
- Spacecraft Design/Mission Planning
- SysML Modeling in Magic Draw
- Systems Engineering Process
- Systems Modeling Language/Modeling Tools

Safety Training cannot exceed 10% of total training hrs per-trainee. (This cap does not apply to Hazmat, OSHA 10/30 or HAZWOPER)

CBT Hrs
0-100

MANUFACTURING SKILLS

- 30-K Forklift Operator Training & Certification (1 hr)
- Aerial Lifts (0.5 hr)
- Emergency Operations Center Roles & Responsibilities (0.5 hr)
- Engineering Re-Use Training (Mechanical Design and Analysis) (0.5 hr)
- Foreign Object Elimination Technical Training (1 hr)
- Halon Training (1 hr)
- Hydrogen PSM Operations (1 hr)
- Indoor Overhead Cranes (1 hr)
- LAI Boot Installation (1 hr)
- Lock Washer Installation and Staking (1 hr)
- Lockout/Tagout Affected (0.5 hr)
- Lube Anti-Seize (1 hr)
- Machine Guarding (1 hr)
- Mass Spectrometer Leak Test (1 hr)
- Move Director Recertification (1 hr)
- Norbar USM Recertification (1 hr)
- Nozzle Awareness Training (1 hr)
- O2, LEL Meter (1 hr)
- Overhead Crane (1 hr)
- Radio Remote Control Crane (1 hr)
- Replic of Comp Surfaces (1 hr)
- Safe Operation of Electric Pallet Jacks Training (1 hr)
- Safety Cable Training (1 hr)
- SATCOM Fundamentals (0.5 hr)
- Small Line \ Fitting Insulation (1 hr)
- Soap Leak Check Process (1 hr)
- Space Electronics Assembly and Test Standard Operating Procedure (1 hr)
- Specific Lockout/Tagout Program (1 hr)
- Specific Process Safety Management (1 hr)
- Standup Electrical Forklift Operator Training & Certification (1 hr)
- The Skillz System (2 hrs)
- Thrust Chamber Entry (Confined Space) (1 hr)
- Versa-Hood Respirator (1 hr)

COMPUTER SKILLS (Advnaced/Intermediate Only)

- Advanced Skills in Microsoft Access 2010 (1 hr)
- Advanced Skills in Microsoft Excel 2010 (2 hrs)
- Advanced Skills in Microsoft Outlook 2010 (1 hr)
- Advanced Skills in Microsoft PowerPoint 2010 (1 hr)
- Advanced Skills in Microsoft Word 2010 (1.5 hrs)
- Building a Project Schedule in Microsoft Project 2010 (1 hr)

- Connecting to People and Resources with My Sites in Microsoft SharePoint 2010 (1.5 hrs)
- Creating and Customizing Websites Using Microsoft SharePoint Designer 2010 (1.5 hrs)
- Creating Business Intelligence Solutions in Microsoft SharePoint 2010 (1.25 hrs)
- Customizing and Sharing Project in Microsoft Project 2010 (1 hr)
- Customizing Workflow Processes Using Microsoft SharePoint Designer 2010 (1.25 hrs)
- Finding Content and People Using Microsoft SharePoint 2010 Enterprise Search (1 hr)
- GN101: Introduction to Maestro (0.5 hr)
- GN102: Introduction to Navigating in Maestro (0.5 hr)
- Intermediate Skills in Microsoft Access 2010 (1 hr)
- Intermediate Skills in Microsoft Excel 2010 (2 hrs)
- Intermediate Skills in Microsoft Outlook 2010 (1 hr)
- Intermediate Skills in Microsoft PowerPoint 2010 (1 hr)
- Intermediate Skills in Microsoft Word 2010 (1.5 hrs)
- Managing and Controlling Documents Using Microsoft SharePoint Designer 2010 (1.25 hrs)
- Managing Content and Processes in Microsoft SharePoint 2010 (1 hr)
- Managing Content, Metadata & Information Policies in Microsoft SharePoint 2010 (1.5 hrs)
- Removable Media Data Transfer (RMDT) Briefing (0.5 hr)
- Setting Up Projects in Microsoft Project 2010 (1 hr)
- Sum Total Approval Manager Module for Training Coordinators (0.5 hr)
- Sum Total Demo How to Create a Custom Report (0.5 hr)
- Sum Total How to Create Groups (0.5 hr)
- Sum Total Introductory Training (1 hr)
- Sum Total Learning Activities Module for Training Coordinators (4 hrs)
- Sum Total Learning Content Module for Training Coordinators (1 hr)
- Sum Total Reporting Module for Training Coordinators (0.5 hr)
- Sum Total Supervisor Training (1 hr)
- Sum Total User Manager Module for Training Coordinators (1 hr)
- Sum Total Performance Management Training - Goal Setting (0.5 hr)
- Taking Content Offline Using Microsoft SharePoint Workspace 2010 (2 hrs)
- Team Collaboration with Windows SharePoint Services 3.0 (1 hr)
- Tracking and Managing Projects in Microsoft Project 2010 (1 hr)
- Working with Line of Business Data Using Microsoft SharePoint Designer 2010 (1 hr)

CONTINUOUS IMPROVEMENT

- Coaching and Mentoring (1 hr)
- Earned Value Management (2 hrs)
- Total Quality Management (ARBOS AR-Business Operating System)
  - 3P Tool (Production Preparation Process) (2 hrs)
  - 5S Tool (2 hrs)
  - Benchmarking Tool (2 hrs)
  - Kaizen Principles (2 hrs)

- Lean Product Development (2 hrs)
- Methodology and Tool Overview (4 hrs)
- MFA Tool (Market Feedback Analysis) (2 hrs)
- Navigation Through Change (2 hrs)
- Overview and Methodology (1 hr)
- Process Documentation Completions and Correction (1 hr)
- PVM Tool (Process Variation Management) (2 hrs)
- Quality Control (1 hr)
- Root Cause Analysis and Corrective and Preventative Action (1 hr)
- Root Cause Analysis/Mistake Proofing Tool (2 hrs)
- Set-Up Reduction Tool (2 hrs)
- Standard Work Tool (2 hrs)
- The Toyota Way (2 hrs)
- TPM Tool (Total Productive Maintenance) (2 hrs)
- Turnback Process Tool (2 hrs)
- VSM Tool (Value Stream Mapping) (2 hrs)
- Operational Excellence 5S (0.5 hr)

BUSINESS SKILLS

- Bid and Proposal Training (1 hr)
- Communication Skills (1 hr)
- Conflict Management Skills (1 hr)
- Cost Volume (2 hrs)
- Engineering Business Management Overview Training (6 hrs)
- Essence of Aerojet Rocketdyne International Trade (0.5 hr)
- Estimating Business System Overview (1.25 hrs)
- Estimating Methods Module 1 (1.25 hrs)
- Estimating Methods Module 2 (1 hr)
- Estimating Methods Module 3 (1 hr)
- Estimating Methods Module 4 (1 hr)
- Estimating Methods Module 5 (1 hr)
- Estimating Methods Module 6 (1 hr)
- Estimating Methods Module 7 (1 hr)
- Government Contract Accounting Module 1 (1 hr)
- Government Contract Accounting Module 2 (1 hr)
- Government Contract Accounting Module 3 (1 hr)
- Government Contracting (2 hrs)
- Industrial Security Briefing (1 hr)
- IT Cyber Security Awareness Training (1 hr)
- Material Review Board (2 hrs)
- MDA Counterfeit Avoidance Awareness Training (1.5 hrs)
- Price and Cost Analysis (6 hrs)
- Procurement Integrity (1 hr)
- Proposal Risk Assessments and Independent Cost Evaluations (1 hr)
- Risk Management (1 hr)
- Safeguarding Classified Information (0.5 hr)
- Supporting Proposal Audits (1 hr)
- The Goal (Theory of Constraints) (1 hr)
- Time Management (1 hr)
- TINA Sweep (Truth in Negotiations) (1 hr)
- Working with Auditors (1 hr)

HAZARDOUS MATERIALS

- Air Quality Compliance (1 hr)
- Environmentally Controlled Area - Clean Room (1 hr)
- Hazard Communication (1 hr)
- Hazardous Waste Handling (1 hr)
- Isocyanate Handler (1 hr)
- Laboratory Safety (0.5 hr)
- Material Handling Awareness (1 hr)
- Methylene Dianiline (1 hr)
- Moisture Prevention (1 hr)
- NC and UEL Workflow Training (1 hr)
- Nickel Safety Awareness (1 hr)
- Personal Protective Equipment and Hazard Liquid Handling (1 hr)
- Process Safety Management Awareness (2 hrs)
- Radiation Safety for Non-Radiographers (1 hr)
- Pyrotechnic Igniter Handling (1 hr)
- Safe Handling of Isocyanates (1 hr)
- Solid Energetic Materials Safety Awareness (1 hr)
- Solid Propellant and Explosive Decontamination Guidelines (2 hrs)
- Specific Cryogenic Safety (2 hrs)
- Storm Water Pollution Prevention (1 hr)

Note: Reimbursement for retraining is capped at 200 total training hrs per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hrs, per trainee excluding OSHA 10/30, HAZWOPER or HAZMAT.

GLENDORA OFFICE
2120 AUTO CENTRE DRIVE
GLENDORA, CA 91740-6720
(909) 305-2800 • FAX (909) 305-2822

SHEET METAL | AIR | RAIL | TRANSPORTATION WORKERS

SMART

Local Union 105

*BAKERSFIELD OFFICE
620 ENTERPRISE WAY
BAKERSFIELD, CA 93307-6821
(661) 832-1187 • FAX (661) 832-1292

VERNON W. SHAFFER
FINANCIAL SECRETARY-TREASURER
RECORDING SECRETARY

LUTHER B. MEDINA
PRESIDENT
BUSINESS MANAGER

DAVID M. SHAVER
VICE PRESIDENT
BUSINESS REPRESENTATIVE

May 19, 2016

Employment Training Panel
1100 J Street, 4th Floor
Sacramento, CA. 95843

Re: Aerojet Rocketdyne, Inc. – Application to the CA Employment Training Panel Project

Dear Sir/Madam:

Sheet Metal, Air, Rail, Transportation Workers Local Union 105 supports the Aerojet Rocketdyne, Inc. Employment Training Panel Agreement. If you have any questions or need any further assistance, please feel free to contact Ms. Lori Turner, my secretary, at (909) 305-2800 ext. 231.

Sincerely,

Luther B. Medina
Business Manager/President

LBM:lat/Rocketdyne CA Employment Training Panel Project 051916
opeiu #537
afl-cio,clc

Business Representatives
Donald P. Bennett
Richard Foss, II
*Chris Gonzalez
Steve Hinson
Tim Hinson
Sam F. Hurtado
William "Bill" Shaver
Joe Whitcher

IBEW LOCAL UNION 2295
International Brotherhood of Electrical Workers A.F.L.-C.I.O.

3556 Lexington Avenue, 2nd Floor (626) 454-4393 El Monte, California 91731

June 6, 2016

Mr. Stewart Knox
Executive Director
Employment Training Panel
1100 J Street, 4th Floor
Sacramento, CA 95814

Dear Mr. Knox:

I am writing on behalf of the International Brotherhood of Electrical Workers Local 2295. We support the proposal being submitted to the Employment Training Panel from Aerojet-Rocketdyne company.

This application will assist Aerojet-Rocketdyne company in meeting our goals. The proposed training will assist our union members in developing new skills to help meet operational demands.

Sincerely,

David J. Clay
Business Manager/Financial Secretary
Local 2295 IBEW

CHRISTOPHER S. GRISWOLD
Secretary-Treasurer

SEAN P. HARREN
President

TEAMSTERS LOCAL UNION NO.986

AFFILIATED WITH THE INTERNATIONAL BROTHERHOOD OF TEAMSTERS

General Teamsters, Airline, Aerospace and Allied Employees, Warehousemen, Drivers, Construction, Rock and Sand

May 19, 2016

Employment Training Panel
1100 J Street, 4th Floor
Sacramento, CA 95843

Re: Aerojet Rocketdyne, Inc. Employment Training Panel Project
ETP Reference #16-0581

Dear Sir/Madam:

Please be advised that the Teamsters Local 986, supports the Aerojet Rocketdyne, Inc. Employment Training Panel Application.

If you need further assistance or have any questions, please contact me at 661-942-2843.

Sincerely,

Greg Bashem

Greg Bashem
Business Representative
Teamsters Local 986

Main Office: 1198 Durfee Avenue • South El Monte, CA 91733 • PHONE (626) 350-9860 • FAX (626) 448-0986
Regional Office: 300 Shadow Lane • Las Vegas, NV 89106 • PHONE (702) 385-0995 • FAX (702) 385-4410
Regional Office: 115 West Bunny Avenue • Santa Maria, CA 93458 • PHONE (805) 922-7875 • FAX (805) 922-3885
www.local986.org

RETRAINEE - JOB CREATION

Training Proposal for:

Bay Alarm Company

Agreement Number: ET17-0190

Panel Meeting of: August 26, 2016

ETP Regional Office: Sacramento **Analyst:** K. Smiley

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate SET HUA Veterans	Industry Sector(s):	Services Construction Priority Industry: ☒ Yes ☐ No
Counties Served:	Alameda, Contra Costa, Los Angeles, Orange, Sacramento, San Bernardino, San Diego, San Joaquin, San Mateo, Santa Clara, Shasta, Sonoma, Ventura	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 1,537	U.S.: 1,537	Worldwide: 1,537
Turnover Rate:	13%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$490,000		$0	$0		$490,000

In-Kind Contribution:	100% of Total ETP Funding Required	$528,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	50	8-200	0-20	$396	$21.28
				Weighted Avg: 22			
2	Retrainee Priority Rate SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	100	8-200	0-20	$486	*$13.90
				Weighted Avg: 27			
3	Retrainee Job Creation Priority Rate SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	135	8-200	0-20	$2,960	*$12.77
				Weighted Avg: 148			
4	Retrainee Veteran Job Creation Priority Rate SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	20	8-200	0-20	$1,100	*$12.77
				Weighted Avg: 50			

*It will be made a condition of contract that the trainees in these Job Numbers will never be paid less than the State or local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Number 1 (SET/Priority Industry): $21.28. **Job Number 2** (SET/HUA): $12.77 per hour –Sacramento County; $11.70 per hour - San Joaquin County. **Job Number 3 & 4** (Job Creation): $14.19 per hour – Alameda, Contra Costa, San Mateo, and Santa Clara counties; $13.73 per hour – Los Angeles County; $13.76 per hour – Orange County; $13.72 per hour – San Diego County; $13.42 per hour – Sacramento County; $12.77 per hour – San Bernardino, San Joaquin, Shasta, Sonoma, and Ventura counties.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $1.70 per hour may be used to meet the Post-Retention Wage in Job Numbers 1, 3-4.

Commissions have ranged from $.25 to $49.17 per hour over the past 12 months, with the average hourly commission being $12.88. Commissions may be used by Sales Staff to meet the post-retention wage requirements.

*The Company is not in Retail Trade. As such, occupations paid by commission do not fall under the Panel's "lowest priority" for FY 2016/17 for Job Number 1 only.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Sales Staff		5
Operations Staff		5
Installer/Dispatcher		15
Service Technician		15
Customer Service Staff		5
Frontline Manager		5
Job Number 2		
Sales Staff		20
Operations Staff		5
Installer/Dispatcher		25
Service Technician		25
Customer Service Staff		15
Frontline Manager		10
Job Number 3		
Sales Staff		20
Operations Staff		10
Installer/Dispatcher		40
Service Technician		40
Customer Service Staff		15
Frontline Manager		10
Job Number 4		
Sales Staff		2
Operations Staff		4
Installer/Dispatcher		4
Service Technician		4
Customer Service Staff		4
Frontline Manager		2

INTRODUCTION

Bay Alarm Company (BAC), a subsidiary of BALCO Holdings, Inc. is the largest independently owned and operated security company in the United States. The Company offers a full range of security products to approximately 100,000 residential and commercial customers across California, including burglar and fire alarm systems, access control and video surveillance.

Training will take place at BAC facilities in Alameda, Contra Costa, Los Angeles, Orange, Sacramento, San Bernardino, San Diego, San Joaquin, San Mateo, Santa Clara, Shasta, Sonoma, and Ventura counties.

PROJECT DETAILS

This will be BAC's third Agreement within five years. Their first Agreement focused on expanding the technical training for entry level Installers and Service Technicians. The second Agreement focused on new technologies including migrating to 4G with higher data speed, implementing a new network, enabling quicker response time, and expanding its ZWave-Z/IP video surveillance solutions.

This Agreement will focus on the Company's new software system, Digital Watchdog Vmax IP+. This is an Internet Protocol camera platform that can be accessed remotely from a mobile application and can control up to 16 cameras at once. Training will also focus on Business Acumen, Customer Service, Effective Time Management and Team Building.

Some curriculum topics are repeated from the previous agreements; however, the subject matter has been updated and improved per new technology and developments so there will be no duplication of training content in those courses.

Retrainee - Job Creation

In support of job creation, the Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

BAC is currently developing two new products that will be released by the end of 2016.

1. Touchscreen, a smart controller that wirelessly connects to motion detectors, smoke detectors, glass sensors, sirens, wireless key fobs and security cameras.

2. Potter Panel, an intelligent fire alarm control panel that monitors wet and dry fire sprinkler systems and reports to a central BAC station.

These two products will expand business capacity. BAC is committed to hiring 155 new employees (Job Numbers 3&4) to support expansion. To be eligible for reimbursement, trainees must be hired within the three-month period prior to Panel approval or during the term of the contract. Trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Courses will be delivered through a combination of Computer-Based Training and Class/Lab Training.

Business Skills (25%): Training will be offered to all occupations as it relates to job function in order to improve client satisfaction and business efficiency. Courses will include Business Acumen, Technical Sales and Contract Knowledge.

Commercial Skills (25%): Training will be offered to Service Technicians and Installer Staff. Courses will include Digital Watchdog and other software systems; Equipment Servicing, and Troubleshooting. Training will enhance staff's ability to better install, maintain and serve BAC products and systems.

Computer Skills (20%): Training will be offered to all occupations as it relates to job function. This training will help improve employee efficiencies in utilizing BAC systems and applications that are vital to the staff's job roles and responsibilities. Courses will include Bay Alarm Proprietary Software System, Alarm and Computer System Procedures and ADP Human Capital System.

Continuous Improvement (30%): Training will be offered to all occupations as it relates to job function. This training will provide workers with skills to increase performance in time management and process improvement. Courses will include Planning/Efficiency, Problem Solving/Decision Making and Process & Quality Improvement.

Commitment to Training

BAC's annual training budget for California is estimated at $330,000, and is spent on basic job skills training, new employee orientation and on boarding, driver safety, ergonomics, anti-harassment, basic OSHA training, basic computer skills, fire code training, and California State Fire/Life Safety Apprenticeship Program.

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  BAC has appointed a central in-house administrator for ETP training at its Headquarters in Pacheco. This individual is responsible for scheduling and tracking all training; meeting with ETP staff; overall record keeping. BAC has two other staff members charged with roster collection and coordinating training among facilities.

Commission

BAC has a formal Commission Plan for Sales Staff. Commissions are calculated and paid twice monthly. BAC requests to use commission to meet the Post-Retention wage of $21.28 for the occupational title of Sales Staff in Job Number 1. Commission for this occupation is based on a percentage of services rendered and sold as well as company profits.

Substantial Contribution

Over the past five years, BAC has earned $648,154 in ETP funding. Of the $648,154, only $199,485 was for the reimbursement of incumbent retrainees. Job Creation retrainees received $448,669 in reimbursement from ETP. The $199,485 was split between 16 facilities throughout CA. Due to this, Substantial Contribution will not be applied to BAC.

SET/High Unemployment Area (HUA)

Under Special Employment Training (SET) companies are not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention.

However, Job Number 2 trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 15%. The Company's locations in Sacramento and San Joaquin counties qualify for HUA status. These HUA trainees qualify for the ETP Minimum Wage rather than the statewide average hourly wage. BAC is requesting a wage modification for the 100 trainees in Job Number 2.

Veterans Program

BAC actively recruits and has a hiring preference for Veterans. Veteran trainees are represented in Job Number 4.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by BAC under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET15-0185	Statewide	7/7/14 – 7/6/16	$425,404	$425,404 (100%)
ET12-0178	Statewide	11/21/11 – 11/20/13	$222,750	$208,773 (94%)

DEVELOPMENT SERVICES

Training Funding Partners in Fountain Valley assisted with development for a flat fee of $12,500.

ADMINISTRATIVE SERVICES

Training Funding Partners will also perform administrative services for a fee not to exceed 7% of payment earned.

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Acumen
- Customer Service/Customer Account Skills
- Technical Sales/Contracts

COMMERCIAL SKILLS

- BayComm Network System and New Fire Panel Technology
- Digital Watchdog Technology
- Enhanced Industry Knowledge Enhanced Security Equipment
- E-waste Recycling
- Lyric System
- Multi-Camera Interactive Video Capture/Surveillance Systems
- Next Generation Cellular Communications
- Equipment Installation
- Equipment Servicing and Troubleshooting
- Residential and Commercial Systems/Applications Protocols

COMPUTER SKILLS

- ADP Human Capital System
- Advanced Microsoft Office
- Alarm and Computer System Procedures
- Bay Alarm Proprietary Software System

CONTINUOUS IMPROVEMENT

- Planning/Efficiency
- Problem Solving/Decision Making
- Process & Quality Improvement
- Team Building/Effectiveness and Team Leadership

CBT Hours

0 – 20

BUSINESS SKILLS

- Collection (4 hrs.)
- Effective Communication (4 hrs.)

CONTINUOUS IMPROVEMENT SKILLS

- Time Management (4 hrs.)
- Team Leadership (4 hrs.)
- Dealing with Difficult People (4 hrs.)

COMMERCIAL SKILLS

- Mobile Fire Inspection (4 hrs.)
- SharePlus Lite (SharePoint mobile access) (4 hrs.)
- PSA (Professional Services Automation) Web Application (4 hrs.)

- DVR (Digital Video Recorder) Basics (4 hours)
- Fire Panel Programming (4 hours)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours per trainee.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Health Net, Inc.

Agreement Number: ET17-0195

Panel Meeting of: August 26, 2016

ETP Regional Office: Sacramento **Analyst:** D. Jordan

PROJECT PROFILE

Contract Attributes:	Retrainee	Industry Sector(s):	Insurance Services Priority Industry: ☐ Yes ☒ No
Counties Served:	Sacramento, Los Angeles	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		
Number of Employees in:	CA: 6,391	U.S.: 8,474	Worldwide: 8,474
Turnover Rate:	12%		
Managers/Supervisors: (% of total trainees)	3%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$738,000		$0	$0		$738,000

In-Kind Contribution:	100% of Total ETP Funding Required	$1,000,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Commercial Skills	410	8 - 200	0	$1,800	$16.48
				Weighted Avg: 120			

Minimum Wage by County: Job Number 1: $16.10 for Sacramento County; Job Number 1: $16.48 for Los Angeles County.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $1.48 per hour may be used to meet the Post-Retention Wage for trainees in Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Support Staff		12
Analyst		45
Claims Specialist		152
Customer Service Representative		188
Supervisor		13

INTRODUCTION

Established in 1979 and headquartered in Woodland Hills, Health Net, Inc. (Health Net) (www.healthnet.com) provides and administers health benefits to approximately 7.6 million individuals across the country. Service delivery is through group, individual, Medicare, Medicaid, Department of Defense (including TRICARE), and Veterans Affairs programs. Health Net operates in 26 states and the District of Columbia. The Company has California offices in Bakersfield, El Centro, Fresno, Huntington Beach, Los Angeles, Modesto, Mountain View, Oakland, Rancho Cordova, Sacramento, San Bernardino, San Diego, San Jose, San Marcos, San Rafael, and Woodland Hills. Only the two Rancho Cordova facilities and one Woodland Hills facility will participate in this proposal.

Health Net's Rancho Cordova and Woodland Hills facilities are eligible for funding as a company facing out-of-state competition as a call center supporting multi-state incoming call volume.

This will be Health Net's second ETP Agreement in the last two years. In the previous Agreement Health Net focused on introducing and implementing the new changes that have

been made by the Affordable Care Act, and hiring new staff. In this contract Health Net will concentrate on training staff on the changes that are continuously evolving, ensuring that incumbent workers are learning new skills and being cross trained on new job functions.

PROJECT DETAILS

Need for Training

With the new changes of the Affordable Care Act (ACA) Health Net requires a large number of highly trained employees. Staff must adjust to the continually changing healthcare market and system. Training will focus on the basic understanding of Health Net program options, benefits and authorization rules. Health Net has developed new health plans to help meet the ACA's standards.

Training Plan

Commercial Skills (100%): Training will be provided to all trainees so they can effectively communicate policies, procedures and applicable benefits to members and healthcare providers, research and insure proper disposition of claims, work in departmental teams, demonstrate effective communications skills, handle difficult and sensitive issues, interact with staff in other departments to clarify and resolve problems presented by customers, and demonstrate a comprehensive knowledge of Health Net programs. They will learn to identify and analyze eligibility and benefit issues, facilitate the filing of appeals and grievances, and maintain complete records and files.

Commitment to Training

Health Net represents that ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company's current training budget for California facilities is approximately $5 million. ETP-funded training will allow Health Net to complete more training at a faster pace. All training is mandatory at Health Net and they regularly provide new employee orientation, computer operations training, and on-the-job training.

- Training Infrastructure

There is a number of staff dedicated to scheduling training, enrolling trainees, and tracking training hours. Health Net has contracted with Steve Duscha Advisories for administrative services. Health Net believes four of their part time employees will work on internal administration of the training activities.

Impact/Outcome

Health Net's objective is to reinforce incumbent workers' basic understanding of Health Net's programs, benefits and referral/authorization rules. After receiving training, staff will have a basic understanding of company processes and be able to follow company customer service protocols.

LMS

Staff has reviewed and approved Health Net's Learning Management System for recordkeeping.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Health Net, Inc. under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0331	Woodland Hills	05/05/14 – 05/04/16	845,800	$776,315 (91%)

DEVELOPMENT SERVICES

Health Net retained Steve Duscha Advisories in Sacramento to assist with development of this proposal for a flat fee of $17,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories will also perform administrative services in connection with this proposal for a fee of not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

COMMERCIAL SKILLS

- ACA exchange products
- Adjustments cross training
- Administrative payment process to resolve a claim issue
- Appeals and grievances
- Applying communication techniques to meet customer's business and human needs
- Applying critical thinking skills: probing, analyzing and problem-solving techniques
- Arizona commercial benefits and eligibility
- Arizona commercial cross training
- Arizona Medicaid cross training
- Arizona Medicaid enrollment and claims processing
- Arizona Medicaid systems training
- Behavioral health claims
- Behavioral health plans
- Behavioral health provider networks
- California claims systems
- California Medicaid enrollment and claims processing
- Capitation systems: claims
- Capitation systems: Commercial
- Capitation systems: Medicaid
- Claim form types and use
- Claim system tools
- Claims adjustments, real time
- Claims research
- Claims review, processing and approval
- Commercial claims
- Commercial cross training
- Commercial payments
- Commercial procedures by state
- Commercial provider networks
- Computer applications and systems
- Cross training in a team environment
- Customer care center ACA payment training
- Database management
- Database reporting
- Dual eligible enrollment
- Dual eligible claims processing
- Dual eligible plans
- Enrollment system, exchange
- Enrollment system, group plans
- Enrollment system, Medicaid plans
- Enrollment system, Medicare plans
- Exclusive provider organization cross training
- Great customer service

- HMO claims
- HMO provider systems
- HMO training
- Home health care claims processing
- Large business groups
- Leading teams
- Medicaid adjustments
- Medicaid applications and systems
- Medicaid claims
- Medicaid long-term care
- Medicaid membership
- Medicaid provider networks
- Medicaid provider systems
- Medical management
- Medicare Advantage enrollment and claims
- Medicare Advantage provider networks
- Medicare claims
- Medicare provider networks
- Membership cross training
- Membership from ACA exchanges
- Membership systems
- Oregon point of service plans
- Oregon systems training
- Physician provider group cross training
- Point of Service plans cross training
- Preferred provider organization cross training
- Preferred provider organizations enrollment and claims
- Preferred provider organizations provider network management
- Provider dispute resolution tools
- Provider grievances
- Provider systems
- Recovery process
- Small business groups
- State health plan benefits and eligibility
- State health plan cross training

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.

RETRAINEE - JOB CREATION

Training Proposal for:

Sysco Sacramento, Inc.

Agreement Number: ET17-0192

Panel Meeting of: August 26, 2016

ETP Regional Office: Sacramento **Analyst:** D. Jordan

PROJECT PROFILE

Contract Attributes:	SET HUA Retrainee Job Creation Initiative	Industry Sector(s):	Wholesale Trade Priority Industry: ☐ Yes ☒ No
Counties Served:	Sutter	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No Teamsters Local 137		

Number of Employees in:	CA: 420	U.S.: 420	Worldwide: 51,700
Turnover Rate:	7%		
Managers/Supervisors: (% of total trainees)	0%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$363,700		$0	$0		$363,700

In-Kind Contribution:	100% of Total ETP Funding Required	$403,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, PL-Comm Skills	380	8 - 200	0	$915	*$15.60
				Weighted Avg: 61			
2	Retrainee Job Creation Initiative SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, PL-Comm Skills	20	8 - 200	0	$800	*$13.00
				Weighted Avg: 40			

*It will be made a condition of contract that trainees will never be paid less than the State or local minimum wage rate at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: $11.70 per hour for Job Number 1 and $10.00 per hour for Job Number 2 in Sutter County.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $2.10 per hour may be used to meet the Post-Retention wage for Job Number 1 only.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		30
Customer Service Staff		15
Lead		20
Marketing Associate		95
Support Staff		15
Technical Staff		20
Transportation Staff		110
Warehouse Staff		75
Job Number 2		
Administrative Staff		1
Customer Service Staff		1
Lead		1
Marketing Associate		5
Support Staff		1

Technicial Staff		1
Transportation Staff		5
Warehouse Staff		5

INTRODUCTION

Sysco Sacramento, Inc. (www.sysco.com) was founded in 2000 and is a subsidiary of Sysco Corporation located in Houston, Texas. Sysco Sacramento is headquarted in Pleasant Grove. Sysco warehouses, distributes and delivers more than 10,000 different food products, beverages, equipment, and supplies. Their delivery distance spans from the Oregon border, south to Lodi, and east to the Nevada border. Some of Sysco's customers are restaurants, schools, assisted living facilities, government facilities, and other businesses.

PROJECT DETAILS

This proposal will be Sysco's second proposal. It is their first proposal in the last five years. Sysco is growing rapidly. The Company is seeking to remain competitive in the food service business. The Company's proposed training will focus on improving product knowledge, processes and procedures. For people skills, the Company will concentrate on customer service and sales techniques.

The Company will train employees on equipment (smartphones, tablets, and internet technology) and the recently purchased Sysco360, a customer relationship management system recently implemented to facilitate customer needs. Training on the Sysco360 software will also help employees establish cross-selling and up-selling opportunities with customers. This will improve production times and allow the Company to ship orders efficiently.

Retrainee - Job Creation

In support of Job Creation, the Panel is offering incentives to companies that commit to hiring new employees. Under the Retrainee-Job Creation program, training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

Sysco has been improving its processes and expanding business capacity by purchasing new equipment and converting its business into an internet business. The Company has committed to hiring 20 new employees (Job Number 2). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Business Skills (40%): Training will be offered to all occupations. Courses will focus on product knowledge, sales techniques and customer service. Training will help the Company improve customer service and sales to its current customers and attract new customers.

Commercial Skills (15%): Training will be offered to Transportation and Warehouse Staff on processes and procedures to improve order accuracy. Training will help improve productivity.

Computer Skills (35%): Training will be offered to all occupations. Sysco has spent a lot of money improving its internet technology and updating equipment (the purchase of portable technologies like tablets and smartphone). Training will allow employees to fully use these technologies.

Continuous Improvement (5%): Training will be offered to all occupations. In the food industry, quality and safety is very important. Training will allow employees to handle products safely and with the utmost care to ensure quality.

Productive Laboratory

Productive Lab (PL) trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

PL will be offered to Transportation and Warehouse Staff. Training will focus on the operation of forklifts, electric pallet jacks, and sweepers. This equipment is too large to fit into a classroom setting. Hands-on operation is the most efficient training method. Trainees will receive up to 60 hour of PL.

Sysco is requesting a 1:3 trainer-to-trainee ratio due to the limited availability of in-house trainers. The trainers will be pulled from production while initiating PL, which will affect overall productivity. Limiting the number of trainers will allow the plant to run as close to capacity as possible. Also, the Company mainly trains employees in small teams since new staff will start off at a slower pace and it will take a number of months to get up-to-speed. Trainers will determine competency.

SET/HUA

Under SET, Sysco is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.

The 400 trainees in Job Numbers 1 work in Sutter County, a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. For a SET-funded HUA, trainees qualify at the ETP Standard Minimum Wage by county. The Panel may also modify the minimum wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. However, Sysco is not requesting a wage modification.

Commitment to Training

Sysco's annual training budget per facility is approximately $352,000. Training has included business development strategies, consultative selling, operating procedures, and MS Office. Sysco has also offered new-hire orientation, OSHA mandated training, on-the-job, and warehouse selector training. Sysco represents that ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

Sysco will have an administrative coordinator to keep track of all rosters and send them to the administrator. Procedures have been developed to collect and submit rosters to maximize earnings. Additionally, National Training Company was retained to assist with the administrative process.

Temporary to Permanent Hiring

Sysco intends to train 10 workers in Job Number 2 under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with

the intention of hiring them into full-time, permanent positions after training. According to Sysco the average time for "converting" temporary workers into full-time permanent employment is 6 months. Sysco is using Deep Kleen, Inc. staffing agency in Elk Grove for their temporary employees. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status. Upon hire into full-time permanent employment, healthcare benefits are available immediately.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Until they are hired by Sysco into full-time employment, retention and post-retention wage requirements cannot be satisfied and the Company will not receive progress payments.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Sysco retained National Training Company, Inc. in Irvine to assist with development of this proposal for a flat fee of $5,000.

ADMINISTRATIVE SERVICES

Sysco also retained National Training Company, Inc. to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Service Standards
- Handling Difficult Customers
- Hispanic and Asian Products
- Improving Customer Contact
- Internet Marketing
- Lead Generation
- Marketing Performance
- Multi-Channel Marketing
- Product Knowledge
- Sales Performance Processes
- Sales Presentations
- Social Marketing
- Sysco Operating Procedures
- Targeted Marketing
- Time Management

COMMERCIAL SKILLS

- Building Customer Orders
- Field Maintenance
- Loading Trucks More Efficiently
- Operating Forklifts
- Operating Electric Pallet Jacks
- Order Selection Procedures
- Order Delivery Procedures
- Palletizing Products
- Product Handling
- Preferred Work Methods
- Temperature Control Instrumentation

COMPUTER SKILLS

- Computerized Inventory
- Contact Management
- Customer Relationship Management
- Dashboard Portals
- External Web Based Applications
- Laptop Techniques
- Sysco360 (Salesforce)
- Sysco Market Express (Desktop)
- Sysco Market Mobile (Phone/Tablet)
- Sysco Portal
- Tablet Applications
- Telogis Fleet Management

CONTINUOUS IMPROVEMENT

- General Manufacturing Procedure Training
- Procurement Efficiency
- Quality Assurance
- Sysco Food Safety
- Sysco Quality Standards
- Team Communication

Productive Lab

0 -60

COMMERCIAL SKILLS (1:3 trainer-to-trainee ratio)

- Operating Forklifts
- Operating Electric Pallet Jacks
- Order Selection Procedures
- Order Delivery Procedures
- Product Handling
- Preferred Work Methods
- Sysco Labeling Systems
- Sweepers
- Tractors
- Trailers
- Warehouse Equipment

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 60 total training hours per-trainee.

General Teamsters Professional, Health Care and Public Employees
LOCAL 137
DAVE HAWLEY
SECRETARY/ TREASURER

ET17-0192

July 6, 2016

Employment Training Panel
1100 J Street
4th Floor
Sacramento, CA 95814

RE: Sysco Foods Services of Sacramento- Employment Training Panel

This letter confirms the support that Teamsters Local 137 has given to Sysco Foods Services of Sacramento for the proposed Employment Training Panel (ETP) project.

The Union understands and agrees that the ETP training program will provide various types of training to members of the Union.

Sincerely,

Russ Butler

Vice President/

Business Agent

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STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Finishing Trades Institute of District Council 36 Joint Apprenticeship Training Trust Fund

Agreement Number: ET17-0905

Panel Meeting of: August 26, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Veterans Priority Rate	Industry Sector(s):	Construction Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles, Orange, Riverside, San Bernardino, Imperial, Kern, Mono, Inyo, San Diego, San Luis Obispo, Santa Barbara, Ventura	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No International Union of Painters and Allied Trades, District Council 36		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
$715,696		$49,680 8%		$765,376

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Journeyman Priority	Commercial Skills Computer Skills, OSHA 10/30	40	8-200	0	$1,717	$24.71
				Weighted Avg: 73			
2	Retrainee Apprentice (Painter)	Commercial Skills, OSHA 10/30	200	8-210	0	$2,002	$21.28
				Weighted Avg: 144			
3	Retrainee Apprentice Veterans (Painter)	Commercial Skills, OSHA 10/30	25	8-210	0	$2,002	$21.28
				Weighted Avg: 144			
4	Retrainee Apprentice (Industrial Painter)	Commercial Skills, OSHA 10/30	30	8-210	0	$2,002	$21.28
				Weighted Avg: 144			
5	Retrainee Apprentice (Glazier)	Commercial Skills, OSHA 10/30	93	8-210	0	$2,002	$21.28
				Weighted Avg: 144			

Minimum Wage by County: $21.28 per hour Statewide (Priority Industry).

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $7.32 per hour may be used to meet the Post-Retention Wage for Job Numbers 2 and 3; up to $6.09 per hour for Job Number 4; and up to $1.45 per hour for Job Number 5.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Journeyman Painter		15
Journeyman Industrial Painter		15
Journeyman Glazier		10
Job Number 2		
Apprentice Painter		200
Job Number 3 (Veterans)		
Apprentice Painter		25
Job Number 4		

Apprentice Industrial Painter		30
Job Number 5		
Apprentice Glazier		93

INTRODUCTION

The Finishing Trades Institute of District Council 36 Joint Apprenticeship Training Trust Fund (Finishing Trades JATTF) (www.de36.org) was established in January 2013 under the auspices of the International Union of Painters and Allied Trades (IUPAT). The Trust is successor to the former Southern California Painting & Drywall Industries Apprenticeship Trust, which held prior ETP training contracts.

The Finishing Trades JATTF is a non-profit organization established in 1908 to provide training for Apprentices and Journeymen Painters, Drywall Finishers and Glaziers. Facilities are available for workers represented by local unions under IUPAT District Councils on a nationwide scale. District Council 36 represents approximately 8,000 members. Bargaining for the signatory employers is conducted by two trade associations: Los Angeles Painting & Finishing Contractors Association, and the Western Wall & Ceiling Contractors Association.

There are three apprentice program sponsors as reflected in the Job Numbers: Painter & Paperhanger Decorators JAC (Job Numbers 2 & 3); Dist. Council 36 Industrial Painter JATC (Job Number 4); and So Cal Glaziers & Glassworkers Industry JAC (Job Number 5). These Job Numbers are within the Apprentice funding cap of $450,000 per program sponsor.

This is the sixth ETP Agreement with the Finishing Trades JATTF. This is the first time Veterans have been introduced as a distinct cohort of Apprentice trainees.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the programs are four years.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC). A JATC is created through collective bargaining, with an equal number of members appointed by union and management with employer contributions to a training trust fund. The employers are not “participants” but are signatories to the Collective Bargaining Agreement.

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (in this case Los Angeles Unified School District and North Orange County ROP). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice. (Journeymen are capped at 200 hours.)

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5, reducing the priority industry rate from $18 to $13 per hour. In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26).

The ETP wage for Apprentices is no less than $21.28 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $21.28, as applies to Journeymen in this proposal.

PROJECT DETAILS

The Finishing Trades JATTF indicates that the demand for specialty workers is driven by newer products and more stringent requirements in the commercial and industrial construction industry. Contractors are also seeking workers that are certified to industry standards put forth by the Society of Protective Coatings, a non-profit professional society that sets standards for working with coatings on steel and other industrial construction materials. Accordingly, training will be provided to Journeyman Painters and Glaziers assigned to specialty work involving new finishes, industrial painting and coating systems, and lead-safe practices. In addition, some trainees will specialize in marine painting skills to work for private contractors performing shipbuilding and maintenance work.

Apprentice Painters and Glaziers will receive training under the standards approved by DAS. Currently, contractors need apprentices with skills that will enable them to work in specialized commercial and industrial jobs. Some work requires industry certifications, and all work must be performed at high levels of efficiency.

Training Plan

Commercial Skills (90%) - Training will be offered to all occupations. Journeymen will learn new products, applying new finishes, lead paint removal, abrasive blasting, complex spraying systems, marine work and welding, and advanced materials, systems and equipment. Training will also include working in unique situations such as confined spaces, and meeting specialized building codes. Some trainees may become skilled enough to advance to foreman level, and also to serve as on-the-job safety superintendents responsible for the set-up, maintenance, and supervision of a safe work environment.

Apprentice Painters will receive training in industrial and commercial painting. Apprentice Glaziers will learn to select, cut, assemble, install, remove, and replace glass and glass substitutes; install commercial building facades, skylights, and windows of all types; and do project layout and welding. Training will help Apprentices become more productive earlier in their careers, and work safely and efficiently on a variety of job sites.

Computer Skills (5%) - Training will be offered to select Journeymen to learn basic computer operations in a building trades setting.

OSHA 10/30 (5%) - Training will be delivered to Journeymen and Apprentice trainees to ensure safe working conditions on-the-job. OSHA 10/30 training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of training for journey-level and 30 hours for frontline supervisors. The coursework is geared to construction work and manufacturing.

Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Impact/Outcome

Journeyman courses are designed to prepare trainees for certification from the Society for Protective Coatings. Apprentice training will result in advancement to Journeyman status.

Curriculum Development and Feedback

Curriculum is developed by the painting industry with national and local input. Union and management are consulted through joint committees at all levels. A focal point for these activities is the Finishing Trades Institute, which makes recommendations to the Trust and other local groups for training programs and curriculum elements. Feedback comes from trainee class assessments and reports from contractors and union representatives to Finishing Trades JATTF management.

Marketing and Support Costs

Employers are notified of training through association websites, mailings, and presentations. Employers participate as members of the joint committee that operates the JATTF, and training is designed around their needs and the general needs of the industry.

Finishing Trades JATTF requests 8% support costs to assist with apprentice recruitment and employer outreach. Although many of the signatory employers have already been made aware of this training opportunity, additional outreach and needs assessments will take place during the term of the Agreement. Staff recommends the 8% support costs.

Electronic Recordkeeping

ETP staff has approved the use of a Learning Management System for recordkeeping.

Commitment to Training

Employers will continue to make contributions to the JATTF for every hour worked by covered employees. Safety training is provided by the participating employers in accordance with all pertinent requirements under state and federal law.

Training Coordination

Training is scheduled to begin in September 2016 for 18 months including a new cohort of Apprentices for training hours that are not covered under ET15-0922. Training will be delivered at four locations in Commerce, Santa Fe Springs, Garden Grove and San Diego by experienced, Journeyman trainers with extensive applied knowledge and teaching experience.

Project administration will be performed in a partnership of the Finishing Trades JATTF, the Los Angeles Unified School District (LAUSD) and Steve Duscha Advisories. The Finishing Trades JATTF will handle class scheduling and completion of training rosters. The two administration vendors will assist in employer liaison, documentation of work hours, uploading training and enrollment data, ETP reporting and related activities.

Tuition Reimbursement

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by the Finishing Trades JATTF under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET15-0922	$649,650	02/21/15 – 02/20/17	345	590	TBD

Based on ETP Online Systems, 46,332 reimbursable hours have been tracked for potential earnings of $665,564 (102% of approved amount). Pending final closeout of this Agreement, the Contractor projects final earnings of 100% based on training completed to date.

PRIOR PROJECTS

The following table summarizes performance by the Finishing Trades JATTF under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0902	Commerce	09/30/13 – 09/29/15	$723,168	$630,738 (87%)
ET12-0158	Commerce	10/06/11 – 10/05/13	$93,846	$93,846 (100%)

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of $10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories and the Los Angeles Unified School District in Los Angeles will perform administrative services for a combined fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 200 hours Trainees may receive any of the following:
Job Number 1

Journeyman

COMMERCIAL SKILLS

Applicator Training
- Corrosion
- Surface preparation
- Abrasive materials
- Coating materials
- Application methods of protective coatings
- Process control
- Safety

Lead Paint Removal
- Lead & other toxic metals
- Regulatory overview
- Worker protection from lead & other toxic metals
- Compliance with air, soil, water/sediment, & dust regulations
- Management of solid & hazardous waste
- Sources of lead exposure
- Control of environmental releases
- Specifications & site-specific compliance plans
- Work site preparation
- Insurance & bonding issues
- Other safety & health hazards

Abrasive Blasting
- Principles of surface preparation
- Primary components of an abrasive blasting system
- Abrasives
- Nozzle equipment operations hands-on session
- Portable centrifugal (wheel) blast equipment operations hands-on session

Spray
- Airless spray equipment operational systems
- Set-up & planning
- Equipment settings, including pressure, fan size, partial triggering
- Proper mixing techniques
- Proper spray techniques
- Troubleshooting
- Simulation experience
- Making adjustments
- Recognizing & eliminating waste of material
- Efficiency ratings
- Environmental safety

- Process control

Marine Plural Component
- Plural component equipment operational systems
- Troubleshooting
- Characteristics of plural component coatings
- Use of two-part high solids epoxy
- Mixing components
- Meeting specifications
- Methods of mixing: manual, at the gun, before the manifold, after the manifold

Marine Coatings
- Elements of marine corrosion
- Coating fundamentals
- Marine coating systems
- Antifouling coatings
- Surface preparation
- Coating application
- Quality management
- Coating failures
- Safety & environmental issues

Safe Working Conditions (all training supplements required safety training)
- Foreman responsibility
- Worker responsibility
- Scaffolding
- Fall protection
- Electrical safety
- Falling objects
- Working in confined spaces
- Working around pipelines
- Managing safety at the worksite

T-Lock System
- Material & tool selection
- Applying coating
- Troubleshooting

Leadership
- Goal setting
- Coaching
- Motivation
- Team building

Advanced Materials & Systems
- Paints
- Coatings
- Conventional spray
- Reducing overspray

Advanced Finishes
- Venetian plaster
- Glaze
- Metallic finishes

Welding
- Types of welds
- Welding theory & practice
- Welding machines
- Electrodes
- What makes a “good” weld
- Welding technique
- Inspection
- Discontinuities
- Striking & maintaining an arc
- Running a bead
- Reading the “puddle”
- Welding in all positions

Total Station Instrumentation
- Setting control points
- Taking readings
- Calibration
- Entering & retrieving data
- Transferring data to a computer
- Comparing structures with plans
- Identifying problem areas
- Documentation
- Advanced blueprint reading

Construction Site Project Management
- Foreman responsibility for communication, documentation & reporting
- Worker responsibility for documentation & reporting
- Emergency response planning

COMPUTER SKILLS

Basic Computer Skills for Construction
- Operating system
- Entering data
- Creating reports
- Using E-mail
- Performing calculations

OSHA 10/30 (OSHA Certified Instructor)
- OSHA 10 Construction Outreach (requires completion of 10 hours)
- OSHA 30 Construction Industry (requires completion of 30 hours)
- OSHA 10 Maritime Industry (requires completion of 10 hours)
- OSHA 30 Maritime Industry (requires completion of 30 hours)

Class/Lab Hours
8 - 210 hours Trainees may receive any of the following:
Job Numbers 2 - 5

Apprentice

COMMERCIAL SKILLS

Industrial Painting Course 1

- Know the basics of industrial painting
- Learn the role of regulatory agencies enforcing their standards in trade
- Understand the responsibilities of employees & employers in the industrial painting trade
- Learn the requirements for an American Red Cross certification in First Aid
- Understand the requirements for an American Red Cross certification in CPR
- Know the appropriate use and care of personal protective equipment and devices in industrial painting
- Learn the appropriate use and care of specialized respiratory equipment for industrial painting
- Understand the basic tools used in industrial painting
- Know the appropriate use and care of industrial painting equipment
- Understand the materials used for industrial coating
- Know how atmospheric conditions affect performance and application
- Learn to prepare surfaces for industrial painting

Industrial Painting Course 2

- Know how to obtain and interpret work permits and document work procedures in the industrial painting trade
- Learn the OSHA and Center for Protection of Workers Rights (CPWR) standards for working in confined spaces
- Understand the OSHA and CPWR standards in dealing with hazards in confined spaces
- Know how to recognize and reduce confined space hazards as prescribed by the LSHA and CPWR
- Learn the appropriate use of personal protective equipment gear
- Understand the methods of fire prevention and practice standby and rescue procedures
- Know basic rigging practices
- Learn various types of ropes, cables and hardware
- Understand the practical application of knots, bends and hitches
- Know the appropriate use and application of suspended work platforms
- Learn the appropriate use of ladders
- Understand the types of uses of scaffolds
- Know the standards and specifications of surface preparation
- Learn the appropriate application of primers and coatings
- Understand the appropriate use of solvents and the cleaning procedures for hand and power tools

Industrial Painting Course 3

- Know the health hazards associated with the industrial painting trade

- Learn both the employer's & employee's responsibilities pertaining to medical monitoring and personal hygiene
- Understand the different environmental considerations in industrial painting
- Review how atmospheric conditions affect performance and application
- Know the personal and environmental protective measures necessary for those in industrial painting
- Understand the basics of project planning and preparation
- Know the items on the procedure checklist
- Learn the methods used for lead testing, chemical testing and air sampling
- Understand the lead-based paint abatement methods used in the interior of a structure
- Know the appropriate methods of abatement for exterior area and soil abatement
- Learn the requirements of industrial large scale abatement
- Understand the differences between pressure washing and hydroblast cleaning

Industrial Painting Course 4

- Review the safe and proper use of equipment in industrial coatings
- Understand the different environmental considerations in industrial painting
- Know the personal and environmental protective measures
- Understand the parts, supplies and machinery used I air blast equipment
- Know the different systems used in abrasive blast cleaning
- Learn the various types, sizes and configurations of blast machines and their corresponding functions and procedures
- Know the different types and applications of metallic coatings
- Understand the difference between the three main categories of non-metallic coatings

Industrial Painting Course 5

- Know the OSHA regulations pertaining to spray painting
- Review the environmental and health impacts of the materials, equipment and procedures used in surface preparation and coating application
- Review safety precautions through hands-on exercises
- Understand the different types of solvents and thinners, their chemical compositions and interactions and their appropriate applications
- Learn the factors affecting atomization and the four basic forms of atomization
- Know the use of compressed air in spray painting
- Understand the spray gun as the key element in conventional material delivery systems
- Know the use of conventional air, airless and electrostatic spray guns on different applications
- Understand the high volume low pressure system of atomization
- Understand the use of high pressure in airless spray painting systems
- Know the operation of the airless spray guns
- Know the purpose of plural component spraying
- Learn the operation of electrostatic spray painting systems
- Know the three types of wire flame spray processes

- Understand the different coating materials used in flame spray operations
- Learn the use and care of flame spray equipment

Industrial Painting Course 6

- Review how atmospheric conditions affect performance and application
- Understand the use of Nordson Gauge
- Know the use and application of fiberglass reinforced plastic (FRP)
- Learn the proper handling of FRP
- Learn the use of fire retardant resins of fiber reinforced compositions (FRC)
- Understand the effects of curing on polyester resins
- Understand the different processing methods of FRP
- Know the basics of reinforcement practices
- Know the basic repairs that can be made to FRP
- Know the uses of epoxy as an architectural coating
- Learn the composition and use of epoxy polyester
- Understand the use of polyurethane coatings
- Know the use of a Taylor profile comparator

Industrial Painting Course 7

- Know safe working practices and eliminating potential hazards
- Learn the details of job specifications
- Know the standards for use of a profile comparator
- Understand industry standards for surface preparation in obtaining bond strength
- Know the standards for sprayed metal application
- Learn the standards for metalizing spray painting
- Understand industry standards for use of the Nordson gauge
- Learn the standards on products that deal with atmospheric conditions
- Understand the standards dealing with the common coating defects and failures

Industrial Painting Course 8

- Know the importance of safety measures in the workplace
- Learn the role and functions of the foreman & how to become a leader
- Know how to keep time records, how to charge off labor & materials for jobs & keep accurate accounting records
- Know the characteristics, barriers, and how to overcome barriers to effective communication and how to plan, organize and estimate the needs of the job

Commercial Painting Course 1

- Know the basics of the painting trade
- Learn workplace safety procedures
- Know the trade applications of whole numbers
- Learn the trade applications of decimals & fractions
- Understand the trade applications of various measurements and the difference between the base-10 system and the metric system
- Know the appropriate use and care of the basic painting and wall covering tools
- Know the appropriate use and care of residential and commercial ladders

and scaffolds
- Understand the materials used for painting
- Know how to prepare surfaces for painting and wall covering, including basic taping techniques
- Learn the impact of environmental factors on the painting process

Commercial Painting Course 2
- Know the importance of OSHA in the workplace
- Review the different tools, equipment and materials used in painting
- Understand how mathematical proportions are applied to practical painting problems
- Know how to measure for mixing
- Learn the principles of color identification in residential and commercial applications
- Understand the painting applications of color harmony
- Know color combination techniques
- Learn how to achieve artistry in work
- Understand how to prepare a surface for painting
- Know the natural and synthetic finishes and special items
- Learn the differences between wood graining tools and marbleizing tools
- Understand wood graining and marbleizing technique
- Know the impact of environmental factors in faux finishing
- Learn faux finishing materials and their uses
- Understand the proper use, care and maintenance of faux finishing equipment
- Know the basics of customer service and public relations

Commercial Painting Course 3
- Know importance of safety measures in the workplace
- Learn the differences between traditional/conventional & modern spray equipment
- Understanding the painting materials and their use
- Know the appropriate use, care and maintenance of equipment
- Learn the impact of environmental factor on spray painting
- Understand spray painting techniques
- Know how to resolve technical and interpersonal job site problems
- Review the basics of customer service and public relations

Commercial Painting Course 4
- Review the trade applications of whole numbers
- Review the trade applications of decimals and fractions
- Review the trade applications of various measurements and the differences between the base 10 system and the metric system
- Know different abrasive materials and their uses
- Learn the proper use, care, and maintenance of abrasive and water blasting equipment
- Understand the impact of environmental factors on abrasive and water blasting
- Know the abrasive blasting techniques
- Review job site problem resolutions

Commercial Painting Course 5

- Know the different types, application methods, and uses of joint compound materials
- Learn the appropriate use and care of special coatings equipment
- Review the trade applications of ratios and proportions
- Review the measurements for mixing
- Understanding the impact of environmental factors on substrates
- Know the methods used in surface preparation
- Learn how to adhere to manufacturer's data during coating application and curing
- Understand the hand-rubbed finishing techniques
- Know various methods of surface cleaning
- Learn the installation of sheets and weld seams to Ameron specifications

Commercial Painting Course 6

- Review the importance of safety measures in the workplace
- Review the trade applications of whole numbers
- Review the trade applications of decimals and fractions
- Review the trade applications of various measurements and the differences between the base 10 system and the metric system
- Know the basics of drywall construction and finishing
- Know the cost calculation of materials and labor
- Understand the characteristics and appropriate use of wall covering materials
- Know the various wall covering application techniques
- Learn the cost estimation of wall covering
- Understand how to determine the amount of paint needed in every project
- Review technical and interpersonal job site problem resolutions
- Review the basics of customer service and public relations

Commercial Painting Course 7

- Review safe working practices to eliminate potential hazards
- Know the appropriate use and care of respiratory equipment used for painting
- Learn how to recognize and reduce confined space hazards as prescribed by OSHA & the Center to Protect Workers' Rights (CPWR)
- Understand the different types and functions of scaffolds used in industrial painting
- Know the different types and applications of metallic coatings
- Learn the contents and applications of OSHA 30
- Understand the basic information necessary to pursue National Association of Corrosion Engineers certifications

Commercial Painting Course 8

- Review the importance of safety measures in the workplace
- Learn the role and function of the foreman and how to become a leader
- Know how to keep time records, understand how to charge off labor and materials for jobs and keep accurate accounting records
- Know the characteristics, barriers and how to overcome barriers to effective communication and how to plan, organize and estimate the needs of the job

Glazier Apprentice Training

- Construction math
- Rigging and hoisting basics
- Hand signals
- Scaffolding basics
- Codes and regulations
- Solvents and glazing materials
- Power tools
- Using transit and leveling instruments
- Hand tools
- Man lifting devices
- Adder use and safety
- Glass cutting and fabrication
- Mirrors: job layout and measurement
- Mirrors: mounting methods
- Plastic glazing material
- Glass replacement and putty glazing
- Insulated and high performance glazing
- Security glazing
- Spandrel and architectural panel systems
- Solar collectors and skylights
- Art glass
- Auto glass
- Door and window accessories and hardware
- Anodized and painted finishes
- Setting blocks, spacers, tapes and gaskets
- Aluminum entrances
- Revolving doors
- Sealants
- Structural glazing
- Ribbon window systems
- Curtain wall layout
- Pressure wall
- Suspended glazing
- Architectural and shop drawings
- Welding

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10 Construction Outreach (requires completion of 10 hours)
- OSHA 30 Construction Industry (requires completion of 30 hours)
- OSHA 10 Maritime Industry (requires completion of 10 hours)
- OSHA 30 Maritime Industry (requires completion of 30 hours)

Note: Reimbursement for journeyman training is capped at 200 total hours per trainee, including OSHA 10/30; reimbursement for Apprentice training is capped at 210 total hours per trainee, including OSHA 10/30, regardless of the method of delivery.

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Bay Area Video Coalition

Agreement Number: ET17-0189

Panel Meeting of: August 26, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** R. Jackson

PROJECT PROFILE

Contract Attributes:	SB <100 Priority Rate Retrainee SET	Industry Sector(s):	Multimedia/Entertainment Communication Technology/IT Priority Industry: ☒ Yes ☐ No
Counties Served:	San Francisco, Marin, Contra Costa, Alameda, Santa Clara, Santa Cruz, and San Mateo.	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No SEIU Local 1021		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		≤20%	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$328,116		$22,679 8%		$350,795

In-Kind Contribution:	50% of Total ETP Funding Required	$497,975

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Advanced Technology	45	8-200	0	$973	$17.02
				Weighted Avg: 35			
2	Retrainee Priority Rate	Advanced Technology	35	8-200	0	$973	$17.02
				Weighted Avg: 35			
3	Retrainee	Advanced Technology	42	8-200	0	$752	$17.02
				Weighted Avg: 32			
4	Retrainee	Advanced Technology	42	8-200	0	$752	$17.02
				Weighted Avg: 32			
5	SB <100 Retrainee Priority	Advanced Technology	40	8-60	0	$1,307	$17.02
				Weighted Avg: 47			
6	SB <100 Retrainee Priority	Advanced Technology	40	8-60	0	$1,307	$17.02
				Weighted Avg: 47			
7	Retrainee SB <100	Advanced Technology	50	8-60	0	$1,035	$17.02
				Weighted Avg: 44			
8	Retrainee SB <100	Advanced Technology	35	8-60	0	$1,035	$17.02
				Weighted Avg: 44			
9	SET Retrainee SB <100	Advanced Technology	5	8-60	0	$1,058	$28.37
				Weighted Avg: 45			
10	SET Retrainee SB <100	Advanced Technology	5	8-60	0	$1,058	$28.37
				Weighted Avg: 45			
11	SET SB <100 Priority Rate	Advanced Technology	4	8-60	0	$834	$21.28
				Weighted Avg: 30			
12	SET SB <100 Priority Rate	Advanced Technology	4	8-60	0	$843	$21.28
				Weighted Avg: 30			

Minimum Wage by County: Job Numbers 1-8: $17.02 for Alameda, Marin, Contra Costa, and San Francisco; Job Number 11-12: $21.28 for SET Priority; Job Numbers 9-10: $28.37 for SET.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☐ Yes ☐ No ☒ Maybe
Participating employers may use health benefits to meet the Post-Retention Wage. Up to $2.50 per hour may be used to meet the Statewide SET Priority wage of $21.28, SET Statewide $28.37 or $17.02.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Animator/ Motion Graphic Artist		30
Content Producer/ Creator		10
Camera Operator		20
Creative Director		10
Marketing Manager/ Assistant Manager		50
Production Artist		60
Producer		20
Software Engineer		10
Video Editor		60
Web Designer/ Graphic Designer		60
Web Developer		20

*It will be made a condition of contract that trainees will never be paid less than the State or local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

INTRODUCTION

Located in San Francisco, Bay Area Video Coalition (BAVC) (www.bavc.org) is a non-profit organization that provides vocational advanced technology media training to digital media professional web and graphic designers, producers, editors, programmers, IT support, communications and office administrators. These occupations work in industries that have communications needs and/or a web presence. The industries served include: video post-production facilities, publishers, broadcasters, design firms, software manufacturers and developers, construction firms, health care providers, manufacturers, and scientific research labs, internet commerce, marketing firms, digital entertainment studios, computer gaming companies, museums, retailers, banks and financial institutions. This is BAVC's eleventh ETP Agreement as a Multiple Employer Contract (MEC).

Participating Employers

ETP requires that MEC applicants demonstrate employer demand for at least 80% of requested funding. BAVC has exceeded this standard. BAVC has verified 32 participating employers and an estimated 364 trainees. BAVC's participating employers include small and large businesses in priority industries with out-of-state competition and some employers without out-of-state competition or otherwise non-priority industries. In cases where participating employers do not

have out-of-state competition, training will be funded under the SET category. All training will be center-based at the Company's facilities in San Francisco.

Union Support

Managers and Web Developers are represented by the SEIU Local 1021. Training cannot begin until a letter of support has been provided.

Industry Demands/Changes

Digital technology is a driving force in the state economy, a mainstay to the advancement of web development, mobile device applications, game creation, and video and audio media creation. Software platforms for digital media and IT are developed and introduced at a rapid rate, often every 6 months. Employers must maintain a workforce able to keep up with the industry's advancements. Per EDD's published Labor Market Information, web development and advertising related occupations are projected to grow by 17% and 34%, respectively, through 2020. Jobs in Virtual Reality Development are also forecasted to grow by 12% during the same period.

BAVC regularly surveys the employer community to identify and assess production, emerging trends, and training needs to update equipment and software programs. Additionally, after each training course, BAVC surveys trainees (including managers and decision makers) to assess the relevance of the curriculum. BAVC uses this information to develop a training plan, adjusting course offerings accordingly.

ETP funding benefits employers, facilitating state-of-the-art training and providing employees the most advanced technical skills on newly-developed software programs and equipment.

PROJECT DETAILS

Rapid technological demands of the various industries served by BAVC are increasing consumer demands for more advanced virtual reality, video, and interactive media. This ETP proposed training provides a cost-effective training solution to the challenges to keep pace with equipment and software changes. Trends within many technology-based industries suggest workers need to be diversified in their skill-sets to perform multiple jobs, instead of one specialized job as broadening job descriptions and widening employer expectations become more common.

Training Plan

With training, employees can develop, create, and maintain program systems in the latest technologies.

Advanced Technology (100%)

All of the training provided is advanced technology, designed exclusively for highly technical professionals, such as 3D Artists, Animators, Camera Operators, Web Developers, and Producers, who work in the digital media technology industries. Training consists of video production, technical courses in new media production and programming and Photoshop, Flash and Final Cut Pro software programs. BAVC offers eight approved BPPE-certificated programs under Beginning Digital Post-Production, Beginning Multi-Media, Beginning Video Production, Intermediate Digital Post Production, Intermediate Multi-Media, Intermediate Video Production, Web Design and Web Programming.

BAVC requests the AT reimbursement rate for all courses in the curriculum ($26 per hour for priority industries and $22 for non-priority industries). The average cost to deliver the training is $37.20 per hour per trainee. Due to the complex nature of the material, training must be delivered in small classes with 10 or fewer to allow in-depth coverage and personal attention from the instructor.

Commitment to Training

Employer training resources will not be displaced by ETP funding. With essential digital media software platforms consistently being upgraded, small and midsized companies often are not able to provide the advanced training needed to remain competitive. BAVC's investment in constant software and equipment upgrades provides a fully equipped state-of-the art training facility to keep pace with digital media advancements. In August 2016, BAVC plans to install new Apple workstations, Adobe Creative Cloud software, Maxon Cinema 4D software, and update existing Final Cut Pro software at an estimated cost of $48,000.

ETP funds will not displace the existing financial commitment to training of participating employers. Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law. Participating employers usually offer non-technical training, which is not specific to media technology departments, or training on proprietary software and hardware. The ETP funding allows employers to benefit from the state-of-the-art certified training they would not normally be able to afford.

Marketing and Support Costs

BAVC is requesting 8% for support costs. BAVC markets effectively via social media (Twitter, Facebook, Tumblr, Flickr, LinkedIn), incorporated search engine optimization (SEO), contracts, and Yelp. BAVC creates monthly eNews, promotes training via its own web site (24,000 unique visits per month), conducts direct email campaigns, and leverages word-of-mouth referrals to acquire new users and keep existing employers/employees.

BAVC has been fortunate to partner with San Francisco Office of Economic and Workforce Development, and TechSF, providing a gateway to the area's best known community and government agencies in order to strategize engagements with industries and leverage relationships. These include, but are not limited to: Year Up Bay Area, BAYCAT, City College San Francisco, SamaSource, Mission Economic Development Agency, Mission Hiring Hall, Community Housing Partnership, Goodwill Industries of San Francisco, San Mateo & Marin, Larkin Street Youth Services, Chinese for Affirmative Action, Jewish Vocational Services, San Francisco LGBT Community Center, Arriba Juntos, Mid-Pacific Information & Communication Technologies, Mo'Magic, Swords to Ploughshares, and Toolworks. BAVC also works closely with one-stop centers such as NOVA, Oakland PIC, and Peninsula Works.

Special Employment Training

Under SET, the participating employers (Job Numbers 9-12) are not required to demonstrate out-of-state competition. Trainees must be earning at least the statewide average hourly wage.

Wage Modifications

BAVC may have some participating employers in priority industries that qualify under SET and whose trainees may not meet the statewide wage requirement of $28.37. The Panel may modify the post-retention wage by up to 25% below the Statewide Average Hourly Wage (to $21.28) for these trainees. BAVC is requesting this wage modification for trainees in Job Numbers 11 & 12. The wage modification will allow companies to upgrade the skills of workers

that otherwise would not qualify, mainly trainees at entry level positions and/or those who may not currently possess the multimedia skills to justify a higher wage. Once trained, the workers will be better able to compete for higher wage positions.

Trainer Qualifications

All instructors are independent contractors who contract with industry leaders to provide digital media and technology services, ensuring that instruction reflects industry practices and trends. Currently all instructors are based in California. BAVC agrees that training by an out-of-state vendor will not be delivered without prior written approval by ETP. BAVC must provide ETP with written notice of proposed services by an out-of-state vendor at least seven working days in advance, in the form and manner prescribed by ETP.

Training Coordinator

BAVC has eight staff members dedicated to its ETP project. Outreach is conducted by the Community Engagement Specialist and Marketing Manager along with the Employer Engagement Lead and the Education Manager. The Senior Director oversees operations and determines curriculum priorities. The Training Manager conducts trainee enrollments and hires instructors. The Contracts and Compliance Manager oversees recordkeeping, invoicing, and contract compliance matters. The Accounting Manager oversees all fiscal aspects of the contract.

Training Agency Certification

Training agency eligibility requires certification by an independent third-party, as required for the type of school and course of study. Bay Area Video Coalition is licensed by the Bureau of Private Postsecondary Education.

Tuition Reimbursement

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

Electronic Recordkeeping

BAVC's electronic recordkeeping system has been reviewed and approved by ETP Staff.

Funding From Other Sources

BAVC receives Workforce Investment Act (WIA) training funds to provide advanced technical training to displaced and transitioning workers through a four year grant with the Department of Labor. The purpose of the WIA grant is to provide services that lead toward freelance, contract and full time regular employment for unemployed participants. WIA grant recipients are not participating in this proposal.

RECOMMENDATION

Staff recommends approval of this proposal, including approval of BAVC's request for 8% support costs and wage waivers for trainees in SET Priority (Job Numbers 11 and 12).

ACTIVE PROJECTS

The following table summarizes performance by BAVC under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Estimated Retained
*ET15-0187	$607,265	7/7/2014–7/6/2016	326	326	326

*BAVC projects it will earn $357,552 (57%) of the total Agreement amount based on hours in ETP's Online Tracking System. The performance on this agreement was hindered by a restructure and reduction of key members of the BAVC management team in the second half of 2015. This management change resulted in a reduced pace of training because participating employer outreach halted for four months. BAVC has taken steps to ensure a stronger performance on this agreement. BAVC is now fully staffed and plans to add two new positions to its dedicated training team in 2016. Additionally, the current proposal has been rightsized by ETP staff.

PRIOR PROJECTS

The following table summarizes performances by BAVC under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
*ET13-0134	San Francisco	8/25/2012–8/24/2014	$699,806	$503,018 (72%)
ET11-0214	San Francisco	3/26/2011–3/25/2013	$399,782	$380,188 (95%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

BAVC will retain California-based trainers to deliver the training. Trainers will be identified as they are retained. Currently, BAVC has retained the following:

Exercepti Communications, Advanced Technology, Fremont, CA;

Geekguy, Advanced Technology, Sacramento, CA; and

Plural Studio Advanced Technology, San Francisco, CA.

Exhibit B: Menu Curriculum

Class/Lab Hours
Job Numbers 1-4: 8-200
Job Numbers 5-12: 8-60

Trainees may receive any of the following:

ADVANCED TECHNOLOGY

- Color Theory
- Graphic and Web Design
- Typography
- Color Correction
- Interviewing Techniques in Productions
- Lighting
- Social Media Marketing
- Photoshop
- Illustrator
- Javascript
- InDesign
- Pro Tools
- Aesthetics of Editing
- Premiere Pro
- Final Cut Pro
- Compression
- Video Pre-Production & Post Production
- Audio For Video Production
- DSLR Cinematography and Photography
- Build a Podcast
- Webcasting for Live Events
- Video Production Bootcamp
- After Effects
- Motion Graphic Design
- Cinema 4D
- Digital Photography
- jQuery
- Building and Configuring a Linux Server
- PHP
- Drupal
- HTML/CSS / HTML5/CSS3
- Responsive Design
- SEO-Search Engine Optimization
- Web Design Workflow
- Wordpress
- Coding
- Wireframing and Diagramming
- Design Research and Strategy
- UX for Mobile Apps
- Experiential Design

Note: Reimbursement for retraining is capped at 60 total hours per trainee for Job Numbers 5-12 and 200 total hours per trainee in Job Numbers 1-4, regardless of the method of delivery.

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: Bay Area Video Coalition | CCG No.: ET17-0189

Reference No: 16-0542 |

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: 12FPS

Address: 520 Hampshire Street, #206

City, State, Zip: San Francisco, CA 94110

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Company: 20/20 Productions

Address: 350 Townsend Street, Ste. 425

City, State, Zip: San Francisco, CA 94107

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 15

Total # of full-time company employees in California: 3

Company: All Environmental Inc.

Address: 2500 Camino Diablo

City, State, Zip: Walnut Creek, CA 94597

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 193

Total # of full-time company employees in California: 91

Company: American City Business Journals

Address: 275 Market Street, Suite 600

City, State, Zip: San Francisco, CA 94111

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 1,600

Total # of full-time company employees in California: 100

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Baidu USA LLC

Address: 1195 Bordeaux Drive

City, State, Zip: Sunnyvale, CA 94089

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 15,000

Total # of full-time company employees in California: 250

Company: Benz Communications

Address: 275 9th Street

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 26

Total # of full-time company employees in California: 18

Company: Bonfire Labs

Address: 190 Pacific Avenue

City, State, Zip: San Francisco, CA 94111

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 29

Total # of full-time company employees in California: 29

Company: California Newsreel (Resolution Films)

Address: 44 Gough Street, Ste. 303

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 12

Total # of full-time company employees in California: 6

Participating Employers in Retrainee
Multiple Employer Contracts

Company: CBS Interactive

Address: 235 Second Street

City, State, Zip: San Francisco, CA 94105

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 4,000

Total # of full-time company employees in California: 850

Company: Center For Asian American Media

Address: 145 Ninth Street, Suite 350

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 9

Total # of full-time company employees in California: 9

Company: Center For Investigative Reporting

Address: 1400 65th Street, Suite 200

City, State, Zip: Emeryville, CA 94608

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 73

Total # of full-time company employees in California: 70

Company: Contemporary Jewish Museum

Address: 736 Mission Street

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 3

Total # of full-time company employees worldwide: 37

Total # of full-time company employees in California: 36

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Dance Mission Theatre

Address: 3316 24th Street

City, State, Zip: San Francisco, CA 94110

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 3

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Company: Eleven, Inc

Address: 500 Sansome Street, First Floor

City, State, Zip: San Francisco, CA 94111

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 125

Total # of full-time company employees in California: 125

Company: Exploratorium

Address: Pier 15

City, State, Zip: San Francisco, CA 94111

Collective Bargaining Agreement(s): Yes

Estimated # of employees to be retrained under this Agreement: 12

Total # of full-time company employees worldwide: 285

Total # of full-time company employees in California: 285

Company: Frameline, Inc

Address: 145 Ninth Street, #300

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Friday's Films, Inc.

Address: 39 Mesa Street, Production Suite 2

City, State, Zip: San Francisco, CA 94129

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 9

Total # of full-time company employees in California: 9

Company: GeoEx

Address: 1008 General Kennedy Avenue

City, State, Zip: San Francisco, CA 94129

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 47

Total # of full-time company employees in California: 47

Company: Giant Creative Strategy, LLC

Address: 1700 Montgomery Street, Suite 485

City, State, Zip: San Francisco, CA 94111

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 198

Total # of full-time company employees in California: 192

Company: Heist

Address: 2525 16th Street, Suite 301

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 9

Total # of full-time company employees in California: 9

Participating Employers in Retrainee
Multiple Employer Contracts

Company: IDEO Product Development Inc

Address: Pier 28 Annex

City, State, Zip: San Francisco, CA 94105

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 682

Total # of full-time company employees in California: 342

Company: Impact Online dba Volunteermatch

Address: 550 Montgomery Street, 8th Floor

City, State, Zip: San Francisco, CA 94111

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 13

Total # of full-time company employees worldwide: 39

Total # of full-time company employees in California: 35

Company: InVision Communication Inc

Address: 2150 Allston Way, Suite 300

City, State, Zip: Berkeley, CA 94704

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 27

Total # of full-time company employees in California: 16

Company: Indigo Films LLC

Address: 155 N. Redwood Drive, Ste. 250

City, State, Zip: San Rafael, CA 94903

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 80

Total # of full-time company employees in California: 80

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Juniper Networks, Inc.

Address: 1133 Innovation Way

City, State, Zip: Sunnyvale, CA 94089

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 13000

Total # of full-time company employees in California: 9000

Company: KGO TV/ABC 7

Address: 900 Front Street

City, State, Zip: San Francisco, CA 94111

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 160

Total # of full-time company employees in California: 160

Company: KOFY TV

Address: 2500 Marin Street

City, State, Zip: San Francisco, CA 94124

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 26

Total # of full-time company employees in California: 26

Company: KPIX

Address: 855 Battery Street

City, State, Zip: San Francisco, CA 94111

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 19,490

Total # of full-time company employees in California: 666

Participating Employers in Retrainee
Multiple Employer Contracts

Address: 100 Valley Drive

City, State, Zip: Brisbane, CA 94005

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 70

Total # of full-time company employees in California: 70

Company: Oakland Museum of California

Address: 1000 Oak Street

City, State, Zip: Oakland, CA 94607

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 121

Total # of full-time company employees in California: 121

Company: One Degree

Address: 2370 Market Street, Suite 162

City, State, Zip: San Francisco, CA 94114

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Company: OneWorld Communications Inc

Address: 2001 Harrison Street

City, State, Zip: San Francisco, CA 94110

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 5

Total # of full-time company employees in California: 5

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Open Eye Pictures Inc

Address: 2656 Bridgeway Avenue, Suite 202

City, State, Zip: Sausalito, CA 94965

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 2

Total # of full-time company employees in California: 2

Company: PaperG Inc

Address: 530 Bush Street, Suite 900

City, State, Zip: San Francisco, CA 94108

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 9

Total # of full-time company employees worldwide: 57

Total # of full-time company employees in California: 26

Company: Punchcut LLC

Address: 170 Maiden Lane

City, State, Zip: San Francisco, CA 94108

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 25

Total # of full-time company employees in California: 25

Company: Remedy Editorial LLC

Address: 1136 Howard Street

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 8

Total # of full-time company employees in California: 8

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Rough House Editorial

Address: 550 Bryant Street

City, State, Zip: San Francisco, CA 94107

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 3

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7

Company: San Francisco Bicycle Coalition

Address: 1720 Market Street

City, State, Zip: San Francisco, CA 94102

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 20

Total # of full-time company employees in California: 20

Company: San Francisco Chronicle

Address: 901 Mission Street

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 30

Total # of full-time company employees worldwide: 47,976

Total # of full-time company employees in California: 20,525

Company: Strategic Education Research

Address: 1663 Mission Street, Suite 650

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 3

Total # of full-time company employees worldwide: 40

Total # of full-time company employees in California: 6

Participating Employers in Retrainee
Multiple Employer Contracts

Company: Teak LLC

Address: 330 Jackson Street, Second Floor

City, State, Zip: San Francisco, CA 94111

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Company: Ten 90 Group Inc

Address: 1140 Dell Avenue

City, State, Zip: Campbell, CA 95008

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 10

Total # of full-time company employees in California: 10

Company: The Asia Foundation

Address: 465 California Street, Ninth Floor

City, State, Zip: San Francisco, CA 94104

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 819

Total # of full-time company employees in California: 98

Company: The Kenwood Group

Address: 75 Varney Place

City, State, Zip: San Francisco, CA 94107

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 25

Total # of full-time company employees in California: 25

Participating Employers in Retrainee
Multiple Employer Contracts

Company: The Working Group

Address: 1714 Franklin Street, Suite 350

City, State, Zip: Oakland, CA 94612

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7

Company: Ubisoft Inc.

Address: 625 Third Street, Third Floor

City, State, Zip: San Francisco, CA 94107

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 9500

Total # of full-time company employees in California: 327

Company: Umlaut Films Inc

Address: 123 Townsend Street, Suite 100

City, State, Zip: San Francisco, CA 94107

Collective Bargaining Agreement(s): None

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 12

Total # of full-time company employees in California: 12

Company: Venables Bell & Partners

Address: 201 Post Street, Suite 200

City, State, Zip: San Francisco, CA 94108

Collective Bargaining Agreement(s): none

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 164

Total # of full-time company employees in California: 161

Participating Employers in Retrainee Multiple Employer Contracts

Company: VIZ Media, LLC

Address: 1355 Market Street, Suite 200

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): none

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 105

Total # of full-time company employees in California: 104

Training Proposal for:

San Francisco Electrical Industry Apprenticeship and Training Trust
Agreement Number: ET17-0904

Panel Meeting of: August 26, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** D. Woodside

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Apprenticeship Veterans	Industry Sector:	Construction Priority Industry: ☒ Yes ☐ No
Counties Served:	San Francisco	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No International Brotherhood of Electrical Workers Local 6		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
$516,320		$35,640 8%		$551,960

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Journeyman Priority Rate	Commercial Skills, Business Skills, Computer Skills, OSHA10/30	190	8-200	0	$564	$67.25
				Weighted Avg: 24			
2	Apprentice	Commercial Skills, OSHA10/30	140	8-210	0	$2,780	$28.80
				Weighted Avg: 200			
3	Veteran Apprentice	Commercial Skills, OSHA10/30	20	8-210	0	$2,780	$28.80
				Weighted Avg: 200			

Minimum Wage by County: $21.28 per hour Statewide (Priority Industry)

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe

Although health benefits are provided, they are not being used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Journeymen Electrician (Inside Wireman)		190
Apprentice Electrician (Inside Wireman)		140
Veteran Apprentice Electrician (Inside Wireman)		20

INTRODUCTION

Established in 1962, the San Francisco Electrical Industry Joint Apprenticeship and Training Trust (SF Electrical JATC) www.sfelectricaltraining.org is a cooperative effort between the San Francisco Chapter of the National Electrical Contractors Association (NECA) and the International Brotherhood of Electrical Workers (IBEW) Local Union 6. SF Electrical JATC serves approximately 391 Apprentices and 1,200 Journeymen.

673 employers are signatory to the collective bargaining agreement. Approximately 70% of these employers are small businesses. Participating employers perform specialized construction work related to the design, installation, and maintenance of electrical systems in commercial, industrial, and residential buildings. SF Electrical JATC recruits and trains apprentices to meet the expanding and rapidly changing needs of San Francisco's electrical industry. Additionally, the JATC provides skills upgrade and improvement courses to Journeymen.

The JATC's training program keeps Journeymen and Apprentices technologically current in various fields including energy efficiency systems, computerized layout, and a new level of infrastructure for energy systems and telecommunications.

Employer Demand

The local hiring demands of the City and County of San Francisco have been considered for this funding request. Large and small infrastructure projects continue to generate the need for electricians who are able to work on more technically advanced construction projects. Examples include the Warriors Stadium, Bayview/Hunters Point Development, Treasure Island Development, Pier 70 Redevelopment, Park Merced and Visitation Valley Redevelopment, Cathedral Hill Hospital, and Transbay Terminal construction.

This will be the fifth Agreement between ETP and SF Electrical JATC. However, this is the first time Veterans have been included as a discrete cohort of Apprentice trainees. This JATC is returning to the Panel for funding at this time because all training has been delivered under its fourth Agreement. This new proposal is driven by the demand of employers for skilled apprentices and journeymen electricians in San Francisco. The JATC expects an increase in the number of apprentices graduating from this five-year program: from 20 in the Spring of 2016 (the first class to graduate in three years) and 18 more in the Fall of 2016, to 48 graduates planned in the Spring of 2017 alone.

Apprenticeship Pilot

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the DAS. ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the program is five years.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC). A JATC is created through collective bargaining, with an equal number of members appointed by union and management with employer contributions to a training trust fund. The employers are not "participants" but are signatories to the Collective Bargaining Agreement.

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (in this case Foothill College). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice. (Journeymen are capped at 200 hours.)

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship Pilot reimbursement is reduced by $5.00, reducing the priority industry rate from $18.00 to $13.00 per hour. The ETP wage for Apprentices will be the SET Statewide rate as modified for priority industries ($21.28 per hour). ETP funding will only apply to apprentices in Year 2+ to ensure commitment.

The ETP wage for Apprentices is no less than $21.28 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $21.28, for both Apprentices and Journeymen.

PROJECT DETAILS

All training outlined in this proposal will be center-based, classroom/laboratory training occurring at the JATC's training facility in San Francisco. Journeymen will receive Commercial Skills, Business Skills, Computer Skills, and OSHA 10/30; Apprentices and Veteran Apprentices will receive Commercial Skills and OSHA 10/30 training.

Journeyman

Commercial Skills (80%) – Electrician/Inside Wiremen install, maintain and repair various types of electrical and electronic equipment in commercial, industrial and residential establishments. They also learn to install, connect, and test electrical wiring systems for lighting, heating, air conditioning, and communications in any building or structure. In San Francisco, industry is undergoing significant change due to the emergence of green technology. Green training is expected to be the centerpiece of the new program because of the demand for energy efficient construction methods and technologies. The shift from analog to digital equipment also dictates the need for extensive retraining.

Business Skills (5%) - Trainees must understand new national building codes and green practices; follow certification guidelines; use more collaborative bidding and project development practices; meet budgets; interact with various types of construction workers; and implement green solutions in traditional work environments. ETP-funded training will give workers the tools to plan, organize, and manage their construction projects more efficiently. Training will also include teambuilding and leadership skills so that electricians can lead teams in an effective and efficient manner.

Computer Skills (5%) - Training will include scheduling, planning and modeling software. AutoCAD and Job Tracking applications will provide trainees with the tools to modify blueprints, look up project requirements, build budgets and timelines, design virtual buildings, and adjust computerized control systems.

OSHA 10/30 (10%) - OSHA 10/30 training is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of training for journey-level and 30 hours for frontline supervisors. This training is not required as a condition of doing business in California. However, the coursework must be approved by, and the instructors must be certified by Cal-OSHA. When delivery is by CBT, all training hours must be delivered in a classroom over a finite number of time, and the vendor must have a certified instructor present to confirm attendance.

Completion of the training results in a certificate that expands employment opportunities. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour or 30-hour course. OSHA 10/30 is not included in the 10% limitation on safety training, nor in the 50% limitation on CBT.

Apprentice

Commercial Skills (95%) The Inside Wireman Apprenticeship is a 5-year program comprised of school and hands-on training. The apprentice electrician works directly under the supervision of

a qualified journeyman electrician and assists with installing and/or maintaining a variety of approved wiring methods for distribution of electrical light, heat, power, radio and signaling utilization systems. Leadership (also called Foreman Training) training will be provided for upper level apprentices so that they develop the skills to make them eligible for foreman work after they become a journeylevel electrician.

COMET (Construction Organizing Membership Education Training) is a course to teach apprentices how to work onsite with other workers both union and nonunion. The JATC states that this is a very important class because there can be differences and challenges between employees which can lead to an unproductive workplace. The title of the course is misleading because it is not a class to teach union organizing or recruitment. It is essentially a teambuilding class for apprentices.

OSHA 10/30 (5%) This training provides a complete overview of occupational safety and health so that construction workers are more knowledgeable about workplace hazards. With OSHA 30, apprentices will also learn how to respond to such hazards.

Veteran Apprentice

The Veteran training curriculum will be the same as Apprentice training outlined above. These trainees are in a separate Job Number to better track performance toward the goal of improved outreach for Veterans.

The JATC is committed to supporting job-related training that helps Veterans transition into the California workforce. Veterans in an Apprenticeship are eligible to receive Montgomery GI Bill benefits, such as a Monthly Housing Allowance. These benefits are paid directly to the Veteran trainees. SF Electrical JATC recruits Veterans in cooperation with Helmets-to-Hardhats, a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades. On its website, the JATC advertises special days just for Veterans to apply for the apprenticeship program. Veterans who apply for an apprenticeship can skip the first stage (the written assessment) and go the second stage (the interview).

Curriculum Development

The Apprentice program uses the National Joint Apprenticeship and Training Committee's Curriculum which was developed for the exclusive use of IBEW-NECA. The Journeyman upgrade Curriculum is employer-driven to meet the needs of signatory San Diego and Imperial County employers. The Curriculum was developed and customized with input from both labor and management representatives to address the local needs of union members, participating employers, and the industry as a whole.

Trainer Qualifications

SF Electrical JATC employs 4 full and 18 part-time trainers. All trainers are former or current members of the trade and the director of the school has received Master Certification status by the National Joint Apprenticeship and Training Committee. In addition, all instructors meet standards set by the LEA.

Impact/Outcome

Upon successful completion of the program, each Apprentice will receive Certificates of Completion from the State of California DAS, the Department of Labor, the National Joint Apprenticeship and Training Committee for the Electrical Industry, and Foothill College.

Certifications for Apprentices and Journeymen may include Arc Flash Safety Awareness, Building Automation Systems, Green Audits, California Advanced Lighting Control Program (CALCTP) Installer and Lighting Acceptance Testing, and Title 24 Lighting Installation and Codes. Apprentices and Journeymen may also receive OSHA 10/30 certifications.

Commitment to Training

The JATC represents that signatory employers will continue to pay into the Trust for Journeyman and Apprentice training. In addition, employers must provide structured, on-the-job training for apprentices that meet DAS standards. ETP funds supplement and do not displace employer contributions to training. Safety training is provided by the participating employers in accordance with all requirements under state and federal law.

Marketing and Support Costs

The JATC is requesting 8% in support costs to fund its staff in recruiting and qualifying additional participating employers for this program. JATC staff also assist with the marketing, recruitment, and needs assessments of trainees and employers.

The JATC will publicize its training through brochures/flyers, personal contacts, the web, public service announcements and presentations at labor-management meetings and industry assemblies. While many participating employers have already been recruited, additional recruitment and assessment activities are still required. The JATC employs six staff to assist with marketing, recruitment, and needs assessments. The JATC reports that its projected budget costs for personnel alone will exceed the ETP support cost funding. Staff recommends 8% support costs.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by SF Electrical JATC under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0903	$670,400	09/08/15-09/07/17	560	466	0

Based on ETP Systems, 40,587 reimbursable hours had been tracked as of July 20, 2016 for potential earnings of $597,211 (89% of approved amount). Training was completed on July 31, 2016 with projections for final earnings at 100%.

PREVIOUS PROJECTS

The following table summarizes performance by SF Electrical JATC under previous ETP Agreements:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0914	San Francisco	03/03/2014 – 03/02/2016	$405,376	$405,376 (100%)
ET13-0916	San Francisco	10/29/12 – 10/28/2014	$340,178	$340,178 (100%)
ET10-0215	San Francisco	09/28/09 – 09/27/2011	$184,450	$21,875 (12%)

ET10-0215 was approved by the Panel prior to the establishment of the Apprenticeship Pilot program and thus focused on Journeymen training. Funds earned were lower than anticipated because Journeymen electricians, who often are employed at later stages of construction, were still experiencing less than full-employment.

DEVELOPMENT SERVICES

California Labor Federation in Sacramento and Strategy Workplace Communications in Oakland assisted with development at no cost.

ADMINISTRATIVE SERVICES

Strategy Workplace Communications will also perform administrative services for an amount not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 (Job Number 1) Trainees may receive any of the following:

JOURNEYMAN

COMMERCIAL SKILLS

Codeology
- National Electrical Code
- Other Recognized Standards (Installation Changes)
- Plan, Build, and Use
- Related Standards (Mandatory and Permissive Rules)
- Special Occupancies and Equipment
- Arc Flash

Analog/Digital Circuit (AC/DC) Principles
- Math for Electricians
- Ohm's Law
- Generators
- Inductance/Reactance
- Series/Parallel Circuits

Grounding
- Grounding and Bounding
- National Electrical Code Article 100-Definitions and Provisions
- National Electrical Code Article 110-Requirements
- National Electrical Code Article 90-Introduction
- National Electrical Code Article Chapters 1-4
- Significant Changes to National Electric Code

Fire Alarm Systems and Installations
- Definitions and Systems
- Initiating Devices and Notification Systems
- National Electrical Code and Installation Requirements
- Start Up and Check Out Procedures
- National Fire Protection Act, 1972 (NFPA 72)

Fire Life Safety
- National Electrical Code (Relating to Fire Alarms)
- National Electrical Code Article 725
- National Electrical Code Article 760
- NFPA 72
- Principles of Electronics

Industrial Motor Control
- Control Relays and Timers
- Jogging and Plugging Controls
- Manual Starters and Magnetic Coils
- Push Buttons, Selector Switches, and Mechanical Devices
- Solid State Electronic Devices
- Variable Frequency Drives

Programmable Logic Control (PLC)
- Developing Ladder Programming
- Introduction to Programmable Equipment
- Programming Programmable Logic Controllers
- Using Timers and Counters in Logic Programs
- Writing a Program

Electrical Design
- 3 and 4-Way Switching
- Design of Electrical Circuits
- Magnetic Motor Control and the Code
- LonWorks and Building Automation
- Transformers and the Code

Voice, Data, and Video
- Audio Distribution
- CCTV Security Surveillance
- Computer Networking
- Fiber Optics
- Telephonic Interconnect

Industry Specific Skills
- Solar Panel Installation
- Solar Photovoltaics
- Building Automation Systems
- Confined Space Entry
- Specialized Tools
- Conduit Bending
- Rigging and Lifting
- Firestop Installation
- Blueprints and Schematics
- Work Flow and Resources
- Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- Proper Equipment Set-Up (Green Training)
- Safe Working Practices*
- Advanced Instrumentation and Motor Controls
- Programmable Logic Controllers
- Advanced Welding
- Architecture Designs and Advanced Plan Reading
- Management and Monitoring of Materials
- Testing Materials and Equipment – Proper Set-Up and Use (Green Training)
- Understanding Changes to Industry Standards (Green Training)

CALCTP (California Advanced Lighting Control Program)
- Advanced Lighting Control Systems
- Lighting Control Strategies

- Line Voltage Switching Controls
- Low Voltage Switching Control
- Dimming Controls
- Occupancy Sensors
- Photosensors

CALCTP Acceptance Testing
Electric Vehicle Infrastructure Training Program (EVITP)

BUSINESS SKILLS

- Teambuilding Skills
- Green Awareness Training and Green Certifications
- Leadership Skills
- Customer Service Skills
- Conflict Resolution
- Problem Solving
- Decision Making Skills
- Inventory Checklist
- Advanced Time Management
- Filling Out Work Documents and Reports Accurately
- Project Management
- Creating Project Bids

COMPUTER SKILLS

- Auto Computer-Aided Design (AutoCAD)
- Job Tracking System
- Scheduling & Planning Jobs

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)

Class/Lab Hours

8-210 (Job Numbers 2 & 3) Trainees may receive any of the following:

APPRENTICE

COMMERCIAL SKILLS
2nd Year

- Orientation, Level II
- Test Instruments, Level I
- Codeology, Level I
- AC Theory, Level I
- Blueprints, Level I
- Electrical Safety-Related Work Practices, Level I
- Transformers, Level I
- Application #5: Conduit Bending
- Application #6: Conduit Bending
- Application #7: Comb. Circuit Wiring
- Application #8: Transformer Connections

3rd Year

- AC Theory
- Blueprints
- Code and Practices
- Electrical Safety-Related Work Practices
- Fire Alarm Systems
- Grounding and Bonding
- Transformers
- Conduit Bending: Rigid & EMT, Chicago & 555
- Lighting Control Panels
- Motor Controls: Relays & Start/Stop
- Cad-welding
- Ground Testing
- Transformer Wiring
- CPR/First Aid Refresher
- COMET (Construction Organizing Membership Education)

4th year

- Code Calculations
- Blueprints (& layout yard)
- Grounding and Bonding
- Motors
- Motor Control
- Lightning Protection
- Lighting Essentials
- Field Trip to Motor Repair Shop and Folsom Power House
- Motor Controls: Mag Starter & 3-Wire Control
- Programmable Logic Controls (PLC's)
- Variable Frequency Drive (VFD's)
- Motor Control Labs
- Code Prep

5th Year

- Code and Practices
- Code Calculations
- Motor Control
- Orientation
- Rigging
- Torque
- PV/Solar Installer
- CALCTP
- EVITP
- CPR/First Aid Refresher
- Leadership (Foreman Training): Managing the Work including NECA/IBEW Presentations

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)

Safety training cannot exceed 10% of total training hours for any individual trainee. This 10% safety training cap does not apply to Hazardous Materials or OSHA 10/30 training.

Note: Reimbursement for Job Number 1 Journeymen retraining is capped at 200 total training hours per trainee regardless of the method of training delivery. Reimbursement for Job Numbers 2 and 3 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of either OSHA10 or 30 for a total of 210 hours regardless of the method of training delivery.

Amendment Proposal #2 for:

Murrieta Chamber of Commerce

Agreement Number: ET16-0161

Amendment Effective Date: August 29, 2016

Panel Meeting of: August 26, 2016

ETP Regional Office: San Diego **Analyst:** K. Campion

CURRENT PROJECT PROFILE

Contract Type:	Priority Retrainee SB<100 HUA	Industry Sector(s):	Manufacturing Goods Movement Transportation/Logistics
Counties Served:	Riverside, San Bernardino, San Diego, Orange, Los Angeles	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☒ Yes ☐ No	Priority Industry:	☒ Yes ☐ No

Current Contract Term: September 28, 2015 to September 27, 2017

Current Funding	In-Kind Contribution
$188,466	$202,000

AMENDMENT FUNDING

Requested Funding	Support Costs	Amendment Funding	In-Kind Contribution
+$188,400	+$13,060	+$201,460	+$212,000

Total Funding
$389,926

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Priority Retrainee	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, OSHA 10/30	149	8-200	0	$654	$15.07
				Weighted Avg: 34			
2	Retrainee	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, OSHA 10/30	18	8-200	0	$545	$15.07
				Weighted Avg: 34			
3	SB<100 Priority Retrainee	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, OSHA 10/30	74	8-200	0	$945	$15.07
				Weighted Avg: 34			
4	Retrainee SB<100	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, OSHA 10/30	20	8-200	0	$564	$15.07
				Weighted Avg: 24			
5	**Priority Retrainee**	**Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, OSHA 10/30**	**110**	**8-200**	**0**	**$770**	***$15.60**
				Weighted Avg: 40			
6	**Priority SB<100 Retrainee**	**Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, OSHA 10/30**	**105**	**8-200**	**0**	**$1,112**	***$15.60**
				Weighted Avg: 40			

*It has been made a condition of contract that these trainees will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail

Minimum Wage by County: Job Numbers 1-4: $15.07 per hour for Riverside and San Bernardino Counties; $15.93 per hour for San Diego County; $15.97 per hour for Los Angeles County; and $16.02 per hour for Orange County; **Job Numbers 5-6: $15.60 per hour for Riverside and San Bernardino Counties; $16.46 per hour in San Diego County; $16.48 per hour in Los Angeles County; and $16.51 per hour in Orange County**

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☐ Yes ☐ No ☒ Maybe

Participating employers may use health benefits to meet the Post-Retention Wage.

Wage Range by Occupation	
Occupation Title	Wage Range
Job Numbers 1 - 4	
Administration Staff	
Operator I	
Operator 2	
Production Worker 1	
Production Worker 2	
Lead	
Technician	
Engineer	
Supervisor	
Manager	
Owner (Job Numbers 3 & 4 Only)	
Job Numbers 5 - 6	
Administration Staff	
Operator I	
Operator 2	
Production Worker 1	
Production Worker 2	
Lead	
Technician	
Engineer	
Supervisor	
Manager	
Owner (Job Number 6 only)	

INTRODUCTION

Founded in 1915 and located in Southwest Riverside County, the Murrieta Chamber of Commerce (Murrieta Chamber) is a nonprofit membership organization comprised of 850 members within the region. Its mission is to create and foster a sustainable business environment through networking, promotion and advocacy, and to assist small businesses to grow and achieve their goals through education and mentorship. The Murrieta Chamber works in partnership with the City of Murrieta and other Chambers in Southwest Riverside County that form the Southwest California Legislative Council.

The Agreement was approved at the September 2015 Panel meeting and training commenced October 1, 2015. It focuses on training some 250 workers from priority and non-priority industries, small and large businesses in Southern California.

AMENDMENT DETAILS/EMPLOYER DEMAND

Murrieta Chamber reports that 233 retrainees have started training to date, from nine priority-industry employers (five SB). Murrieta Chamber has documented the delivery of training hours

sufficient to support payment earned at 90% of the Agreement amount. More employers are requesting training, but there is not enough funding available to meet this demand. Additionally, at least two employers who already participated are requesting more training. The increases demand is all Priority Industry.

Therefore, Murrieta Chamber requests Phase II under new Job Number 5 (large employers) and Job Number 6 (Small Businesses). ETP staff verified that there is an immediate training demand to support this request and that there is sufficient time remaining in the term of contract for delivery (six-month training period, three-month retention period).

The Curriculum will not change, and will remain as originally approved for: Continuous Improvement (Process Mapping, Quality Engineering, Lean and Six Sigma); and Business Skills (Customer Service, Leadership). All training will continue to be customized based on individual employer assessments.

Phase II training will begin upon Panel approval. As amended, the contract will still be within the FY 2015/16 funding limitations and the Phase II job numbers will have post-retention wages consistent with the 2016 calendar year. Any trainees who participated under Phase I will complete a 90-day retention period prior to being enrolled in a Phase II Job Number. No trainee will receive more than 200 training hours per person regardless if the trainee has participated under both Phase I and Phase II.

Employer Core Group/Support Costs

The Phase II core group of participating employers consists of four priority-industry Small Businesses and one large business. These employers have not previously participated. Additionally, there are 2 - 4 employers who have expressed a need for additional training under this Agreement. As such, the employer demand represents at least 80% of the requested Phase II training. Murrieta Chamber will continue to recruit employers and assess employer-specific job training requirements throughout the term of the project; the goal is to focus on priority industries and small businesses. Due to the intensive outreach efforts required to market the program, Murrieta Chamber requests and ETP staff recommends 8% support costs.

MEC Broker Model - Training Vendors

This Agreement was approved in September 2015, prior to the Panel's adoption of the MEC Broker Model policy. At that time, Murrieta Chamber retained one training vendor to provide training: Custom Corporate Communications (C3) of Redondo Beach. This vendor provided all training under Phase I for approximately $151,390.

Under Phase II, in order to comply with the Panel's new policy, Murrieta Chamber represents that no more than 45% of the training hours will be delivered by C3, for approximately $73,722. The remaining 55% of the training will be provided by private, independent trainers yet to be identified. This representation will be made a condition of contract.

Summary of Amendment Changes:

1. Add Phase II of training;
2. Increase the Agreement amount by $201,460 (from $188,466 to $389,926);
3. Increase the average number of trainees by 215 (from 261 to 476) in Job Numbers 5-6.

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARIZE PRIOR MODS/AMENDS

Modification No. 1 redistributed fund/trainees from Job Number 3 to Job Number 1, which:

- Reduced the Agreement amount from $188,985 to $188,466; and
- Increased the total average number of trainees from 248 to 261;

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by Murrieta Chamber under the current ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Average)	No. Completed Training	No. Retained
ET16-0161	$188,466	9/28/15 – 9/27/17	261	126	126

As of 7/19/16, the ETP tracking system reflects that Murrieta Chamber has documented 7,665 reimbursable training hours for 229 trainees, a potential earning of $169,371 (90% of the Agreement amount). Of the 229 active trainees, 126 have completed training and the 90-day retention period.

TRAINING VENDORS

Custom Corporate Communications in Redondo Beach will provide Continuous Improvement and Business Skills training for a flat amount of $73,722 under Phase II. Other training vendors will be identified as needed during the term of the Agreement.

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: Murrieta Chamber of Commerce | CCG No.: ET16-0161

Reference No: 15-0293 |

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: BTL Machine

Address: 1168 Sherborn St.

City, State, Zip: Corona, CA 92879

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 70

Total # of full-time company employees in California: 70

Company: Hanger 24 Craft Brewery LLC

Address: 1710 Sessums Dr.

City, State, Zip: Redlands, CA 92374

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 109

Total # of full-time company employees in California: 109

Company: OC Metals

Address: 2720 S. Main St., Ste. B

City, State, Zip: Santa Ana, CA 92707

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 22

Total # of full-time company employees in California: 22

Company: Price Products

Address: 106 State Place

City, State, Zip: Escondido, CA 92029

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Participating Employers in Retrainee
Multiple Employer Contracts

Contractor's Name: Murrieta Chamber of Commerce	CCG No.: ET16-0161
Reference No: 15-0293	Page 2 of 2

Company: West Coast Corporation

Address: 4245 Pacific Privado

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 38

Total # of full-time company employees in California: 37

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

7th Inning Stretch LLC dba Stockton Ports

Small Business

ET17-0187

Approval Date: August 11, 2016

ETP Regional Office: Sacramento **Analyst:** W. Sabah

CONTRACTOR

- Type of Industry: Multimedia/Entertainment

  Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees

  California: 12

  Worldwide: 12

  Number to be trained: 12

  Owner ☐ Yes ☒ No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 1%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $11,880
- In-Kind Contribution: $22,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	12	8-60	0	$990	*$11.70
				Weighted Avg: 45			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

- Reimbursement Rate: Job #1: $22 SB Non-Priority
- County(ies): San Joaquin
- Occupations to be Trained: Administration Staff, Ticketing Sales Staff, and Marketing Staff
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Strategic Business Solutions, LLC of Visalia assisted with development services for a flat fee of $832.
- Administrative Services: Strategic Business Solutions will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: Bill Guertin dba Stadium Gorilla of Illinois will deliver Business Skills training for a flat fee of $5,000.

OVERVIEW

Founded in 1946 and located in Stockton, 7th Inning Stretch LLC dba Stockton Ports (Stockton Ports) (www.stocktonports.com) owns and operates the Stockton Ports, a Class A baseball farm team affiliated with the Oakland Athletics Major League Baseball franchise. In 2005, the baseball team began to play at the Banner Island Ballpark in Stockton. The venue also provides professional baseball entertainment, high school playoffs, concerts, charitable events and other

community activities. Under this ETP contract, Stockton Ports plan to train administration, sales and event employees.

Need for Training

As the baseball industry becomes more complex and automated, local Baseball Farm Team affiliates are being required to maintain and comply with Major League Baseball standards while striving to be more efficient. In addition, local entertainment entities such as the Stockton Ports must create a balance between providing a professional entertainment venue that is affordable to both sponsors as well as an average family. Stockton Ports strives to reach this goal by providing staff with the necessary skills to utilize their Customer Relationship Management software and ensuring staff can communicate effectively with sponsors and customers.

To maximize the value in products offered to the community and to increase market share, the Company will implement a comprehensive training plan to cross-train employees on computer and ticketing software, facility equipment, sales, marketing and social media. Stockton Ports also plans to improve employee professionalism to promote a cohesive corporate culture through leadership and teambuilding training.

Training Plan

Stockton Ports will deliver 8-60 hours of Classroom/Laboratory training. Training will be delivered by a combination of in-house trainers and outside vendors.

Business Skills: Training will be offered to all occupations to improve employee skills on marketing strategies, social media tools, promotion and packages, charitable presence and broadcast/print media. Training will increase sales and allow the organization to obtain a larger fan base.

Commercial Skills: Training will be offered to all occupations to insure staff is prepared and organized for game day and special events. Trainees will receive training on preparation processes, quality control, time management, scheduling, vendor presentation, sound and lighting, ticketing processes, vendor requirements and set-up to insure fluidity of events.

Computer Skills: Training will be offered to all occupations on internal software programs such as Glitnir Software and Property Port to improve customer database, contact management, and sales functions. Training will also focus on increasing efficiency between customers and vendors and to improve ticket tracking, smartphone ticketing and ticket swap functions.

Continuous Improvement: Training will be offered to all occupations to provide a cohesive workforce and promote a team environment. Select trainees will also receive leadership training to lead teams, coach, motivate and mentor staff to provide a better work environment and increase team morale.

SET/HUA

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.

However, all trainees work in a High Unemployment Area (HUA) exceeding the state average by at least 25%. The Company's location in San Joaquin County qualifies for HUA status under these standards. Stockton Ports is requesting a HUA wage modification to $11.70 per hour.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Sales and Marketing
- Social Media Marketing
- Ticketing Processes

COMMERCIAL SKILLS

- Game Day Staff Management
- Special Events Management

COMPUTER SKILLS

- Glitnir Software
- Microsoft Office Suite (Intermediate/Advanced)
- Property Port
- Website Development and Management

CONTINUOUS IMPROVEMENT

- Coaching and Mentoring Skills
- Leadership
- Teambuilding

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Applied Ceramics, Inc.

Small Business

ET17-0154

Approval Date: August 4, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** V. Estrada

CONTRACTOR

- Type of Industry: Manufacturing

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 95

  Worldwide: 150

  Number to be trained: 23

  Owner ☐ Yes ☒ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 3%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $28,704
- In-Kind Contribution: $33,185

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Computer Skills	23	8-60	0	$1,248	$17.02*
				Weighted Avg: 48			

It will be made a condition of contract that trainees will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

- Reimbursement Rate: $26 SB Priority
- County(ies): Alameda
- Occupations to be Trained: Admin/Support Staff, Owner/Executive, Sales, Production, Quality Control, Supervisor/Manager
- Union Representation: ☐ Yes ☒ No
- Health Benefits: $3.02 per hour

SUBCONTRACTORS

- Development Services: Applied Ceramics retained Manex in San Ramon to develop this proposal.

  Note: Manex is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000. In this proposal, the fee will be $2,870. This fee does not affect the approved amount of funding.
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1994, Applied Ceramics, Inc. (Applied Ceramics) (www.appliedceramics.com) designs and manufactures a wide variety of highly specialized and technical products using ceramics, sapphire, aluminum oxide, graphite, and quartz amongst other materials. The Company's products are used for manufacturing computers, computer chips, medical devices, automotive parts, and other technologies. Customers include aerospace/aviation establishments, military agencies, and semiconductor companies.

Need for Training

This will be Applied Ceramics' first ETP-funded training project as it updates its order processing structure with a new Enterprise Resources Planning (ERP) system. The old system did not allow sales to access the status of order in real time; sales had to call and wait for someone to track the order and then report back. The new ERP system will allow employees to access order status in real time (rather than call the production plant to track down the product). Trainees will also receive skills in other computer software systems. Proficiency in these systems will help increase quality and reduce costs. Applied Ceramics' internal IT department will provide the training.

Training Plan

Training will be scheduled on a semi-weekly basis. Employees will receive training in phases so that there will always be sufficient staff to manage the day-to-day operations. The HR Manager is coordinating the launch, oversight, and administration of the ETP funded training.

Computer Skills - Training will be offered to all occupations in ERP, intermediate/advanced software systems, and server configurations. Training will improve the ability to process orders; track and communicate order status; and provide accurate billing information.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60

Trainees may receive any of the following:

COMPUTER SKILLS

- Enterprise Resource Planning (ERP)
  - Motava Network Systems
- Intermediate/Advanced Software Systems
  - Google and Microsoft Applications
  - Mobility Software Application and Access
  - Proprietary Reporting & Support Systems
- Server & Hardware Configurations

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Retrainee - Job Creation Training Proposal for:

Attivo Group, Inc.

Small Business

ET17-0163

Approval Date: August 2, 2016

ETP Regional Office: San Diego **Analyst:** M. Ray

CONTRACTOR

- Type of Industry: Services
  Technology/IT
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 13
  Worldwide: 14
  Number to be trained: 16
  Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 18%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $18,200
- In-Kind Contribution: $27,408

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Cont. Imp.	13	8-60	0	$1,040	*$16.51
				Weighted Avg: 40			
2	Retrainee SB <100 Priority Rate Job Creation Initiative	Business Skills, Computer Skills, Cont. Imp.	3	8-80	0	$1,560	$25.00
				Weighted Avg: 60			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the statewide minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table.

- Reimbursement Rate: Job #'s 1 & 2: $26 SB Priority
- County(ies): Orange
- Occupations to be Trained: Administrative Support, Sales Staff, Technical Staff, Manager, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #1: $3.93 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach assisted with development for a flat fee of $900.
- Administrative Services: TFS will also assist with administration services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2004 and located in Santa Ana, Attivo Group, Inc. (AGI) (www.attivoconsulting.com) provides system selection; sales; design; and implementation consulting, training, and support for Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM) software. AGI's customer base includes manufacturing, distribution, and service companies. The Company's goal is to provide a "managed services" approach to the information processing needs of its clients by managing all their computer needs.

This will be the fourth Agreement between AGI and ETP in the last five years, the third in five years. In its previous projects, the Company was able to provide extensive Computer Skills training, focusing on software systems application skills improvement. The Company was also

able to provide sales, product knowledge, and project management skills training to successfully support and implement product offerings as well as improve production workflow.

Training is driven by the constant technological updates of AGI's products and services:

- The Company's software development partners have released new products and upgraded versions of existing products such as Exact Online, Exact Macola 10, Ebiz Merchant Services, Sniperdyne Nomad eCommerce, Lynq Visual Planner, Labor Tracker and Factory Manager, and WiSys Warehouse Management; and

- Additional services have been developed to successfully support the above-mentioned offerings. The Company's business goal is to provide a "managed services" approach to the information processing needs of its clients to support their systems, further saving time and money.

In addition, every few months, each software developer releases a new version of their software, which includes new features that require training to understand fully its capabilities to sell, consult and support the products. As new technologies are developed, AGI must retain qualified experts on the latest technology.

With ETP funding, AGI can provide extensive knowledge and skills training to its workforce to assist the Company's customers and successfully support AGI's overall business goals. Training will allow the Company to exceed customer expectations, increase market shares, and maintain its place in the software industry.

Retrainee – Job Creation

To support its increased product offerings and expanding business capacity, AGI moved from a smaller facility in Irvine to a new office location in Santa Ana. Respectively, AGI will hire net new employees. In this proposal, the Company has committed to hiring three new Technical Staff. These newly-hired workers (Job Number 2) will enable the Company to meet increased demands of current customers and service an increasing client base.

AGI represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

In this proposal, some curriculum topics are repeated from the prior agreements; however, AGI ensures that the subject matter has been updated and/or improved; thus, no duplication of training in those courses. Employees who participated in the prior training plan will not receive the same training in this proposal.

Training will be delivered by both in-house and outside training vendors via class/lab at the Santa Ana location in the following:

Business Skills – Training will be offered to all occupations. Course topics include New Product Offerings, Project Management, Sales/Marketing Skills, and Social Media Marketing. Training will enable workers to handle more sales volume, including creating quotes and proposals to attract, sell, service and maintain new and current accounts.

Computer Skills – Training will be offered to all occupations. Training topics include Cloud Hosting, Credit Card Merchant Services, Database Administration, Disaster Recovery, Exact Macola 10, Exact Macola Online, Managed Services, and Service Management Expansion. Training will allow workers to keep pace with the latest versions of various software systems as well as provide employees the skills to effectively utilize these systems to provide customers with comprehensive product solutions and improve overall operational efficiencies.

Continuous Improvement – Training will be offered to all occupations to improve processes and efficiencies throughout the Company by providing topics such as Needs Analysis, Process Design, Workflow Mapping, and Demo Techniques. Workers will learn to streamline operations, improve processes, and increase customer service.

Increase in Range of Hours (Job Creation)

In its most recent project, AGI requested an increase in the maximum hours from 60 to 80 for its Job Creation trainees to capture the most critical training needed for new workers. Half of the trainees completed 80 hours of training.

The Company is again requesting to increase the maximum hours from 60 to 80, for three newly-hired Technical Staff trainees (Job Number 2). These new employees will require a significant amount of training in existing and new technology.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by AGI under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0188	Irvine	10/28/13 – 10/27/15	$19,760	$18,126 (92%)
ET12-0119	Irvine	7/20/11 – 7/19/13	$18,720	$18,720 (100%)

Exhibit B: Menu Curriculum

Class/Lab Hours
Job Number 1: 8 – 60
Job Number 2: 8 – 80

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting Procedures
- Human Resources Systems Procedures
- Internal Systems Procedures (scheduling, billing)
- New Product Offerings
- Office Administration Procedures
- Project Management
- Sales/Marketing Skills
- Social Media Marketing

COMPUTER SKILLS

- Cloud Hosting
- Credit Card Merchant Services
- Database Administration
- Disaster Recovery
- Exact Macola 10
- Exact Online
- Managed Services
- Service Management Expansion

CONTINUOUS IMPROVEMENT

- Business Process Assessment
- Needs Analysis
- Online/Demo Techniques
- Process Design
- Workflow Mapping

Note: Reimbursement for retraining is capped at 60 total hours, per-trainee, for Job Number 1 and 80 total hours, per trainee, for Job Number 2, regardless of method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Bakersfield Baseball Club, LLC dba Bakersfield Blaze

Small Business

ET17-0152

Approval Date: July 18, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Reeves

CONTRACTOR

- Type of Industry: Services

  Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees

  California: 10

  Worldwide: 10

  Number to be trained: 8

  Owner ☐ Yes ☒ No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 18%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $7,040
- In-Kind Contribution: $15,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Imp.	8	8-60	0	$880	*$12.50
				Weighted Avg: 40			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

- Reimbursement Rate: Job #1: $22 SB Non-Priority
- County(ies): Kern
- Occupations to be Trained: Administration Staff, Facilities Management Staff, Sales/Marketing Staff, Groundskeeper
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Strategic Business Solutions, LLC in Visalia assisted with development for a flat fee of $493.
- Administrative Services: Strategic Business Solutions will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

The Bakersfield Baseball Club, LLC dba Bakersfield Blaze (Blaze) is a Class A advanced farm team for the Seattle Mariners Major League Baseball organization. The Blaze has been serving the community of Bakersfield and greater Kern County for 75 years. Following ownership changes and facility negotiations in recent years, the Blaze has stabilized its operations and is looking to make improvements that will bring value to the organization and the community.

Need for Training

The baseball industry is becoming increasingly complex and automated. Training is needed in order for staff to stay current with Major League Baseball industry standards. Specific areas identified for improvement include communication, office automation, sales and marketing, ticketing processes, facilities management, teambuilding, and leadership.

Sales and marketing training will teach workers the most effective ways to promote and generate team interest from sponsors and fans alike. Facilities management training is designed to ensure an enjoyable entertainment experience at the ballpark for all consumers.

The Company also strives to increase employee proficiency in the use of various software applications utilized throughout the baseball industry, such as StatTrax/Trackman and TicketReturn. Training in this area will improve player scouting, data sharing, scheduling, accounting, sales analysis, and customer relationship management.

Training Plan

Business Skills – Training will be offered to Administration Staff, Facilities Management Staff, and Sales/Marketing Staff. Training will teach workers to effectively promote the ball club, secure sponsorships, and maximize visibility of the organization. Training will also teach employees reach a broader audience through the use of popular social media sites such as Facebook, Twitter, Instagram and others. Training emphasis will also be placed on establishing accurate and timely ticketing processes.

Commercial Skills – Training will be offered to Facilities Management Staff and Groundskeepers. The Blaze ballpark is an older structure that requires constant upkeep. As a small organization looking to keep outsourcing costs low, Blaze employees must be highly trained in the maintenance and operation of the facility. Training includes troubleshooting related to scoreboard electronics, HVAC systems, plumbing, and public address systems. In addition, training will cover vendor relations for employees responsible for dealing with food and beverage vendors. Groundskeeper training will focus on soil composition, fertilizing, pest control, and efficient irrigation methods.

Computer Skills – Training will be offered to Administration Staff, Facilities Management Staff, and Sales/Marketing Staff. Training will help the Company expand its use of software applications for ticket tracking and printing, ticket swap functions, smartphone ticketing, and scanning at all gates. Ticket data management training will improve attendance analysis and planning for promotional/marketing initiatives. StatTrax/Trackman software training will provide employees with the necessary tools to record, manage, and generate player and team statistics.

Continuous Improvement – Training will be offered to all occupations. The Company's core group of employees will learn effective techniques to lead, motivate, coach, and mentor a

recurring influx of seasonal staff. Teambuilding and leadership training will promote accountability and help establish a productive team atmosphere throughout the organization.

Special Employment Training (SET)/High Unemployment Area Wage Modification

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify for SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.

The trainees in this proposal work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by at least 25%. The Company's location in Kern County qualifies for HUA status under these standards.

These trainees qualify for the ETP minimum wage, rather than the statewide average hourly wage. The Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Bakersfield Blaze is requesting a wage modification.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 60

Trainees may receive any of the following:

BUSINESS SKILLS
- Sales and Marketing Training
- Social Media Marketing
- Ticketing Processes

COMMERCIAL SKILLS
- Turf and Grounds Management
- Facilities Management

COMPUTER SKILLS
- TicketReturn Software
- Microsoft Office Suite
- SalesForce Applications
- StatTrax/Trackman Software
- Website Development and Management

CONTINUOUS IMPROVEMENT
- Coaching and Mentoring Skills
- Leadership
- Teambuilding

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.

DELEGATION ORDER

Critical Proposal
AB118
Retrainee - Job Creation
Training Proposal for:

Buster Biofuels LLC

Small Business

ET17-0800

Approval Date: August 16, 2016

ETP Regional Office: San Diego **Analyst:** J. Davey

CONTRACTOR

- Type of Industry: Manufacturing
  Green Technology
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 30
  Worldwide: 30
  Number to be trained: 15
  Owner ☐ Yes ☒ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 0%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $58,500
- In-Kind Contribution: $30,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Job Creation Initiative Priority Rate SB <100	Business Skills, Computer Skills, Mfg. Skills, PL-Mfg. Skills	15	8-150	0	$3,900	$14.00
				Weighted Avg: 150			

It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

- Reimbursement Rate: $26 SB Priority
- County(ies): San Diego
- Occupations to be Trained: Lab/Plant Operator, Regulatory Reporter
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2009 and located in Escondido, Buster Biofuels LLC (Buster Biofuels) is a biofuel manufacturer in San Diego and Los Angeles. The Company collects food oil and grease trap waste from regional restaurants, filters and renders it, and re-sells it to diesel fuel distributors as biofuel.

In October, 2013 the Company broke ground on a 5 million gallon-per-year bio-refinery. The refinery is expecting to begin manufacturing biodiesel in July 2016.

Buster Biofuels is eligible, as outlined under California Unemployment Insurance Code Section 10205(c), for reimbursement as a California employer training existing and planned full-time employees consistent with the Alternative and Renewable Fuel Vehicle Technology Program (AB 118) program guidelines funded through the California Energy Commission.

AB118

This proposal will be funded under the AB 118 Training Program administered by ETP in partnership with the California Energy Commission. The overall goal of the AB 118 Program is to support a transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies. There is no expenditure of Employment Training Tax funds for the AB 118 Program. Public entity employers are eligible to participate, such as city and county regional transit authorities. Training is focused on job skills for a skilled workforce to produce and distribute new alternative fuels and design, construct, install, operate, service and maintain new fueling infrastructure and vehicles. Alternative Fuel is defined as any fuel other than the traditional selections, gasoline and diesel from petroleum sources, used to produce energy or power. Examples of alternative fuels are: bio-diesel, ethanol, methanol, electricity, propane, compressed or liquid natural gas, and hydrogen.

Green/Clean Operations

The Renewable Fuel Standard (RFS2) set in place by the EPA and the state of California's Low Carbon Fuel Standard (LCFS) call for increased production of biofuels such as biodiesel. This is in an effort to meet emission reduction goals established to mitigate global warming and to preserve the environment. When fully operational, Buster Biofuels will provide significant renewable fuel to help meet the Federal RFS and the state's LCFS.

Retrainee - Job Creation

Buster Biofuels has committed to hiring 15 new employees (Job Number 1). Buster Biofuels represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into "net new jobs" as a condition of contract.

Buster Biofuels is in the process of transforming from a food oil rendering (filtering) facility to a fully functional biodiesel manufacturing facility (bio-fuel refinery). The current rendering facility operates with limited equipment for filtering food oils and other organic byproducts, and only requires up to three Production Staff working a single shift 5-day week. The expansion into a fully operational bio-fuel refinery will demand approximately 15 new employees to operate and support the facility's 24/7 production schedule.

As the Company becomes a fully operational manufacturing refinery, new employees will be required to operate complex bio-fuel refinery equipment and a chemical analysis laboratory. All trainees will be newly-hired retrainees (Job Creation) and will need extensive training on how to operate sophisticated food oil and other related organic material refinery equipment. Trainees will also need to analyze the chemical components of the organic "crude" food oil and adjust the refining process accordingly.

PROJECT DETAILS

Training Plan

Training will take place at the Company's Escondido plant. All trainees will be newly-hired Lab/Plant Operators or Regulatory Reporters. (Regulatory reporters collect data on the raw food oil material and the refined biofuel to report to regulatory agencies). Trainees will receive training from in-house and outside training vendors in the following skills:

Business Skills: Training will be offered to both occupations in Communication, Feedstock and Chemical Procurement, Scheduling, Inventory Management, Fuel Transactions & Protocols and Regulatory Reporting. Training will give workers the necessary business skills to operate a biofuel refining plant.

Computer Skills: Training will be offered both occupations. Topics will include Data Entry and Analysis, Monitoring Technological Processes and Process Logic Control Panel. Training will give trainees the skills in software applications to operate and monitor plant equipment.

Manufacturing Skills: Training will be offered to Lab/Plant Operator. Topics include Equipment Operation and Maintenance, Batch Feed Testing and Monitoring, Biofeed Preparation, Cooking Oil Rendering and Refining, Sampling, Testing and Monitoring, Lab Standard Operating Procedures/Protocols and Forklift Operation. Trainees will receive extensive training in the operation of a biofuel refinery plant.

Productive Laboratory-Manufacturing Skills

Productive Lab (PL) trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

Training in the operation of a bio-fuel refinery requires many hours of hands-on PL training for a Lab Technician/Plant Operator to become proficient in the continuously operating bio-fuel refinery. Regulatory Reporters may receive up to 24 hours in PL on plant equipment directly related to their job. In addition, newly-hired Plant Operators must understand how to operate the plant's computer program for data tracking/monitoring/adjusting batches from start to finish. This is essential for quality assurance and mass balance calculations. Also, it is imperative that the Operators have a hands-on experience and understanding of the equipment (trucks, valves, pumps, plc, instrumentation, etc.) to grasp the production concepts and perfect their skills. The plant's operations are extremely complicated and will take Operators intense ongoing training, beyond ETP-funded training and typical training programs. Therefore, Buster BioFuels is requesting an allowance of up to 75 PL hours this Alternative/Renewable Fuel, AB 118 funded project.

Trainees will receive training in small group ratios of 1:1, however, in some rare cases 1:3. Trainees may receive up to 75 hours (no more than 50% of total training hours) in PL training. Trainers will be experienced in the operation of equipment and machinery and deliver training in specified steps, making sure trainees understand the basics of operation before moving to a new topic. Training is expected to be delivered in no more than six hour sessions.

Training Hours Modification

Training hours are capped at 60 per trainee for Small Businesses. However, Buster BioFuels is asking for a modification to this cap. Because the trainees are newly-hired to the Company, have no experience in biofuel refinery skills, and will be working on brand new equipment, they will need extensive training in equipment operation and chemical lab techniques. It is expected that these new workers will need at least 200 hours of training in these emerging industry skills. Buster Biofuels is requesting a maximum of 150 per trainee.

The Company projects that training in the operation of a bio-fuel refinery will require many hours of class/lab and hands-on PL training for a newly-hired trainee with little experience to become proficient in the continuously operating bio-fuel refinery. Plant Operators require training in both broad and specific training to operate the refinery safely and productively. Operators will need to be trained from the beginning of the process (oil receiving) through production and all the way

to outbound product loading to customer's tankers. Extensive training will be required to ensure they understand all aspects of a bio-fuel refinery.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 150 Trainees may receive any of the following:

BUSINESS SKILLS

- Communication with customers
- Marketing and communications
- Feedstock & chemical procurement
- Scheduling (maintenance, staff, batches and more)
- Inventory management
- Fuel transaction & protocol
- Creating regulatory documents
- Regulatory calendar/scheduling
- Regulatory reporting (EPA, IRS, CARB, BOE, etc.)

COMPUTER SKILLS

- Enzymatic production program
- Data entry and analysis
- Monitoring technological processes
- Process logic control panel (managing batches)

MANUFACTURING SKILLS

- Safety meeting protocol
- Confined space training
- Forklift operating
- Fire safety
- Emergency response
- Chemical handling
- Truck unloading (understanding vacuum/pressure systems)
- Filter box/screw press operations
- Used cooking oil rendering
- Grease Trap rendering/processing water
- Lab SOP's (Karl Fischer, flash point, QTA, incu-shaker, etc.)
- Lab scale reactions
- Lab alternative feedstock research and testing
- Equipment maintenance and understanding
- Biofeed preparation and titrations
- Reactor loading (initiating batches)
- Dosing reactions
- Sampling, testing and monitoring reactions
- Boiler and chiller (monitoring and controlling process temperatures)
- Compressed air monitoring
- Troubleshooting reactions
- Biodiesel/glycerin methanol recovery
- Glycerin separation, sampling, testing
- Polishing, sampling and testing
- Critical testing – quality assurance

- Regulatory reporting (EPA, IRS, CARB, BOE, etc.)
- B100 blending and dosing
- Truck loading, core sampling, metering, scale
- Bridging the gap – handoff procedures from production to administration

PL Hours
0 – 75

MANUFACTURING SKILLS (Ratio 1:3)

- Confined space training
- Forklift operating
- Fire safety
- Emergency response
- Chemical handling
- Truck unloading (understanding vacuum/pressure systems)
- Filter box/screw press operations
- Used cooking oil rendering
- Grease Trap rendering/processing water
- Lab SOP's (Karl Fischer, flash point, QTA, incu-shaker, etc.)
- Lab scale reactions
- Lab alternative feedstock research and testing
- Equipment maintenance and understanding
- Biofeed preparation and titrations
- Reactor loading (initiating batches)
- Dosing reactions
- Sampling, testing and monitoring reactions
- Boiler and chiller (monitoring and controlling process temperatures)
- Compressed air monitoring
- Troubleshooting reactions
- Biodiesel/glycerin methanol recovery
- Glycerin separation, sampling, testing
- Polishing, sampling and testing
- Critical testing – quality assurance
- Regulatory reporting (EPA, IRS, CARB, BOE, etc.)
- B100 blending and dosing
- Truck loading, core sampling, metering, scale
- Bridging the gap – handoff procedures from production to administration

Safety Training is capped at 10% of a trainee's total training hours

Note: Reimbursement for retraining is capped at 150 total hours per-trainee, regardless of method of delivery. PL is capped at 75 hours per-trainee.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Retrainee - Job Creation Training Proposal for:

Charles McMurray Co.

Small Business

ET17-0171

Approval Date: August 4, 2016

ETP Regional Office: Sacramento **Analyst:** K. Smiley

CONTRACTOR

- Type of Industry: Services
  Manufacturing
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 98
  Worldwide: 98
  Number to be trained: 96
  Owner ☐ Yes ☒ No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 4%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $99,424
- In-Kind Contribution: $100,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate SET	Business Skills, Computer Skills, Continuous Impr, Mfg Skills, PL- Mfg Skills	76	8-60	0	$1,014	$16.06
				Weighted Avg: 39			
2	Retrainee SB <100 Priority Rate SET	Business Skills, Computer Skills, Continuous Impr, Mfg Skills, PL- Mfg Skills	10	8-60	0	$910	$21.28
				Weighted Avg: 35			
3	Job Creation SB<100 Priority Rate SET HUA	Business Skills, Computer Skills, Continuous Impr, Mfg Skills, PL- Mfg Skills	10	8-60	0	$1,326	*$10.00
				Weighted Avg: 51			

*It will be made a condition of contract that trainees will never be paid less than the State or local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

- Reimbursement Rate: Job #'s 1-3: $26 SB Priority
- County(ies): Fresno, Sacramento
- Occupations to be Trained: Customer Service Staff, Manager, Sales Staff, Administrative Staff, Warehouse Staff
- Union Representation: ☒ Yes Local 431
  ☐ No
- Health Benefits: Job #2 only: $2.49 per hour

SUBCONTRACTORS

- Development Services: Strategic Business Solutions LLC of Visalia assisted with development for a flat fee of $5,500.
- Administrative Services: Strategic Business Solutions LLC will also perform administrative services for a fee not to exceed 7% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Established in Fresno in 1946, Charles McMurray Co. (McMurray) (www.charlesmcmurray.com) is a wholesale distributor of household hardware goods/laminates and a manufacturer of laminated panels. The Company compiles orders and distributes general hardware products to contractors, cabinet manufacturers, lumberyards, hardware stores, and home improvement centers, with customers in California, Nevada, and Southern Oregon. The Company's main warehouse is located in Fresno (Job Numbers 1 and 3) with a branch warehouse in Sacramento (Job Number 2).

PROJECT DETAILS

This proposal will be McMurray's third. The first ETP Agreement developed a business structure to address the impact of the construction industry's downturn and incorporated basic Lean and quality improvement processes. The second ETP Agreement, focused on developing flexible skill sets to address business growth. It also developed skills for a greater online presence for business expansion.

This proposal will focus on effective communication and problem solving between departments in an effort to increase efficiencies and promote a team environment among all staff. This will create positive communication between staff that will increase client satisfaction. Additionally, Administrative Staff will receive training on the Company's new payroll software system, iSolved. Courses offered in the previous Agreement will be for newly hired trainees and incumbent staff that did not receive this training in the previous contract.

Retrainee - Job Creation

In the last two years, McMurray implemented new online business processes with the intention of creating a conservative growth plan. McMurray's growth plan exceeded expectations and is now projecting approximately 15% growth in market share over the next year due to the steady influx of new clients and a recovering construction industry. This projection will necessitate increased business capacity in order to meet the needs of their clients. Trainees will include Customer Service Staff and Warehouse Staff.

McMurray has committed to hiring 10 new employees (Job Number 3). Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Business Skills: Training will be offered to all occupations to enhance customer satisfaction and increase effective communication. Courses will include effective communication, advanced sales and marketing, and strategic planning.

Computer Skills: Training will be offered to all occupations. All trainees will receive training in the Company's ERP Eclipse software system while Administrative and Customer Service Staff will train in Microsoft Office Suite, iSolved payroll software and web portal design and development. Training will ensure competency in all software programs.

Manufacturing Skills: Training will be offered to Warehouse Staff and will include Laminate Panel manufacturing equipment (and processes) and advanced materials handling training. This training will increase production efficiencies and ensure a safe working environment.

Continuous Improvement: Training will be offered to all occupations in LEAN workflow and Quality Control processes to increase efficiencies. Warehouse Staff will also train in distribution process improvements.

Productive Laboratory

Productive Lab (PL) will be offered to five newly hired Warehouse Staff. Training will include hands-on Laminate Panel manufacturing equipment, Panel saws, and Panel fabrication machine. Trainees will complete related classroom training prior to PL. Trainers will be subject matter experts dedicated specifically to PL training. Trainers will monitor trainee progress and ensure trainees are meeting proper safety and production standards.

Training will be conducted in small groups to maximize efficiency since the machine requires two or three workers to operate. This will also maximize the trainer's availability to trainees. The trainer-to-trainee ratio will not exceed 1:3, with each trainee receiving not more than seven hours of PL.

SET/HUA

Under Special Employment Training (SET), the employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage of $28.37 at the end of retention.

However, trainees in Job Numbers 1 & 3 work in Fresno County, a High Unemployment Area (HUA) with unemployment exceeding the state average by 25%. Trainees in an HUA qualify for the ETP Standard Minimum Wage rather than the Statewide Average Hourly Wage. Further, the Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages.

Job Number 1 trainees will qualify at the ETP Standard Minimum Wage and will not require a wage modification. However, McMurray is requesting and staff recommends a wage modification for Job Number 3 (from $12.77 per hour to $10.00 per hour) for 10 newly hired trainees.

Union Support

The General Teamsters Union Local 431 who represents the Company's Warehouse Staff supports this proposal.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by McMurray under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0378	Fresno, Sacramento	05/01/2014 – 04/30/2016	$91,650	$91,650 (100%)
ET13-0114	Fresno, Sacramento	08/14/2012– 12/31/2013	$49,088	$49,088 (100%)

Exhibit B: Menu Curriculum

Class/Lab Hours
8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- Contract Negotiation
- Advanced Customer Service Skills
- Advanced Sales Training
- Advanced Accounting and Credit Risk Management
- Effective Communication
- Strategic Planning

COMPUTER SKILLS

- Advanced Eclipse Software System
- iSolved Payroll Software
- Microsoft Office Suite
- Web Portal Design and Development

CONTINUOUS IMPROVEMENT

- LEAN Workflow Processes
- Problem Solving Techniques
- Advanced Leadership Training
- Teambuilding
- World Class Distribution Practices

MANUFACTURING SKILLS

- Laminate Panel Manufacturing Equipment and Processes
- Advanced Materials Handling Training
- Chemical Handling and Disposal
- Safety Training

PL Hours
0-7

MANUFACTURING SKILLS (1:3 trainer-to-trainee ratio)

- Laminate Panel Equipment Operation
- Panel Saw Operation

Safety Training will be limited to 10% of total training hours, per-trainee.

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. PL is capped at 7 hours per-trainee.

GENERAL TEAMSTERS UNION LOCAL NO. 431

Packinghouse Employees, Warehousemen, Drivers and Helpers, Dried Fruit and Nut Packers and Dehydrators; Fresno and Madera Counties, California

Affiliated with the International Brotherhood of Teamsters

President, Peter Núñez • Secretary-Treasurer, Lennie Wells • Vice-President, Fred Willshaw

Recording-Secretary, Chris Garlick • Trustees, Cliff Amende, Rod Hollett & Steve Sharp

May 5, 2016

Executive Director
Employment Training Panel
1100 J Street, 4th Floor
Sacramento CA 95814

Dear Sirs,

The International Brotherhood of Teamsters Union Local No 431 supports the ETP Training Program at Charles McMurray Company. We represent the members employed at Charles McMurray Company located in Fresno, California. The program will provide our members with skills needed to meet operational demands which in turn will provide a more secure work environment for the future.

If you have any questions, please do not hesitate to contact me at (559) 486-5410.

Thank you.

Sincerely,

Lennie Wells
Secretary-Treasurer
General Teamsters Union Local No 431

LW/ms

1140 W. OLIVE • FRESNO, CALIFORNIA 93728-2815 • (559) 486-5410 • FAX (559) 441-1743
Email: teamsters431@sbcglobal.net

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Dart NeuroScience LLC

Agreement Number: ET17-0161

Approval Date: August 2, 2016

ETP Regional Office: San Diego **Analyst:** K. Campion

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Biotechnology/Life Sciences Priority Industry: ☒ Yes ☐ No
Counties Served:	San Diego	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 247	U.S.: 247	Worldwide: 247
Turnover Rate:	7%		
Managers/Supervisors: (% of total trainees)	6%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$85,968		$0	$0		$85,968

In-Kind Contribution:	100% of Total ETP Funding Required	$226,621

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Commercial Skills, Computer Skills, Continuous Impr., Hazwoper	199	8 - 200	0	$432	$18.00
				Weighted Avg: 24			

Minimum Wage by County: $16.46 - San Diego County
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Clinical & Regulatory Staff		9
HR & Financial Staff		8
IT Staff		5
Operations & Purchasing Staff		9
Research Associate		13
Scientific Computing Staff		16
Associate Scientist		35
Scientist		68
Senior Scientist		25
Supervisor/Manager		11

INTRODUCTION

Founded in 2008 and located in San Diego, Dart NeuroScience LLC (DNS) (http://www.dartneuroscience.com/) is a research and development company dedicated to discovering new technologies and therapeutics to help maximize cognition. DNS's mission is to become the leading specialized pharmaceutical company for memory disorders by focusing on the discovery and development of innovative drugs. DNS examines genes involved in the reorganization of synaptic connections in the brain. The Company's research activities also include examining biochemical, physiological, and behavioral techniques to identify genes, networks, and pathways underlying cognitive processes; and developing compounds for treating cognitive and motor disorders, to name a few of its research activities.

To fulfill its mission, DNS must continually train its staff to excel in scientific disciplines. Therefore, DNS must provide training in laboratory and manufacturing practices. Because scientific research is a constantly changing environment, DNS leaders must train project teams to adapt and scientific teams to work effectively manage their teams. Project management and Leadership Skills are essential. Computer Skills training in scientific application software is also necessary. Training is needed in compound identification, computational modeling, analysis, and data and compound archiving. DNS proposes to train 188 frontline staff and 11 Managers in Commercial Skills, Computer Skills, Continuous Improvement and Hazwoper.

Training Plan

Training will be conducted primarily by in-house instructors. Training vendors may also be utilized.

Commercial Skills (58%) – This training will be provided to all occupations to ensure trainees have the advanced knowledge and skill sets necessary to improve job skills. Training will consist of a predominantly science-based curriculum but also includes courses for the HR and Financial departments.

Computer Skills (25%) – This training will be provided to all occupations. Trainees learn the newest business system applications. Scientific Computing Staff will receive training in scientific and statistics–based software, HR Staff will receive training on new payroll and information management systems.

Continuous Improvement (15%) – This training will be provided to all occupations. Trainees will learn the importance of proper time management (and adherence to deadlines), how to foster strong interpersonal relationships between employees in their respective work teams. Trainees will learn Project Management, Leadership Development, Statistical Theory and Team Building Skills.

Hazardous Waste Operations and Emergency Response Standard (HAZWOPER) (2%) – This training will be provided to Operations Staff who must learn how to properly dispose of chemical waste. This training is a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. Training consists of 40 hours of classroom training for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Impact/Outcome

The proposed training will enable DNS to be a leading specialized pharmaceutical company for memory disorders.

Commitment to Training

DNS currently spends approximately $65,000 per year for training in sexual harassment prevention, new-hire orientation, scientist conferences and symposiums, life skills training, general safety including injury and illness prevention in the workplace, chemical safety, and biological and radiation hazards training. This training will continue at the Company's expense.

ETP funds will help DNS provide more specialized technical skills and job-specific training to its workers. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

The Director of Human Resources will have program oversight of this training project. Three HR Representatives and Administrative Staff will be responsible for scheduling training, gathering ETP attendance rosters and enrolling and tracking all trainees in the ETP on-line systems. ETP Staff will provide technical assistance to DNS in the ETP on line systems.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

COMMERCIAL SKILLS

- Good Manufacturing Techniques
- Good Lab Practices & Processes
- Biology Technical Skills
- Chemistry Technical Skills
- Accounting & Finance Technical Skills
- HR Technical skills

COMPUTER SKILLS

- MS Office Suite (Intermed. & Advanced)
- Technical Statistical Software Application Skills
  - Compound identification
  - Computational Modeling
  - Computational Analysis
  - Data and Compound Archiving
- Information Management Application Skills

CONTINUOUS IMPROVEMENT

- Project Management Skills
- Communication Skills
- Leadership Development Skills
  - Management versus Leadership
  - Leading and Managing Change
  - Teaming and Team Leadership
  - Problem solving and Decision Making
  - Leading and Managing Performance
- Statistics
- Team Building

OSHA – HAZWOPER (requires certified instructor)

- Hazardous Waste Disposal

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.

DELEGATION ORDER

Retrainee - Job Creation Training Proposal for:

Emerald Kingdom Greenhouse LLC

Small Business

ET17-0208

Approval Date: August 16, 2016

ETP Regional Office: Sacramento **Analyst:** K. Smiley

CONTRACTOR

- Type of Industry: Manufacturing
  Agriculture
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 10
  Worldwide: 10
  Number to be trained: 25
  Owner ☐ Yes ☒ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 10%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $39,000
- In-Kind Contribution: $45,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100 HUA	Business Skills, Computer Skills, Manufacturing Skills	10	8-60	0	$1,560	$11.70
				Weighted Avg: 60			
2	Retrainee Job Creation Initiative Priority Rate SB <100	Business Skills, Computer Skills, Manufacturing Skills	15	8-60	0	$1,560	*$10.00
				Weighted Avg: 60			

*It will be made a condition of contract that the trainees in Job Numbers 1 & 2 will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail. Furthermore, the ETP Agreement will escalate Post-retention wage to $10.50 effective January 1, 2017 for this proposal.

- Reimbursement Rate: Job #'s 1 & 2: $26 SB Priority
- County(ies): Shasta & Trinity
- Occupations to be Trained: Administrative Staff, Production Staff and Sales Staff
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Law Offices of David Clark of Redding assisted with development services for a flat fee of $3,900.
- Administrative Services: Law Offices of David Clark will also assist with administration for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2014, and headquartered in Redding, Emerald Kingdom Greenhouse LLC (Emerald) manufactures and sells climate-controlled greenhouses and automated climate control components. The Company's products are purchased by clients in agriculture Industries for crop production purposes, in an effort to combat reduced agricultural production brought about by drought conditions. Emerald has locations in Redding and Weaverville. Both facilities will participate in training under this Agreement.

Need for Training

As a small manufacturer, Emerald must remain competitive and distinguish itself as the best choice for customers. To stand above the competition, Emerald will deliver structured training in three basic areas.

First, training will focus on newly purchased robotic machinery that will increase production efficiencies and increase trainee's skills. Second, the Company will deliver training on the newly purchased Epicor to ensure best practices in tracking products, invoicing for services and monitoring merchandise in transit. This training will allow Administrative Staff to provide the most accurate information to clients regarding products and services. Lastly, the Company will focus on customer service training to will allow staff to better serve existing clients and effectively market themselves to new clients.

Retrainee- Job Creation

In support of job creation, the Panel offers incentives to companies that commit to hiring new employees. Training for newly hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

Emerald is increasing existing business capacity by adding a permanent graveyard production shift to its current operations. This new shift will allow Emerald to manage the anticipated increase in demand.

Emerald has committed to hiring 15 new employees (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

High Unemployment Area (HUA)

Trainees in Job Numbers 1 & 2 work in High Unemployment Areas (HUA), with unemployment exceeding the state average by 25%. The Company's locations in Shasta and Trinity counties qualify for the ETP Reduced Standard Wage rather than the Standard Wage. The Panel may modify the ETP Standard Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages.

For Job Number 1, Emerald is requesting a wage modification from $15.60 to $11.70 for 10 incumbent staff. For Job Number 2 retrainees, Emerald is requesting a wage modification from $12.77 to $10.00 for 15 newly hired trainees. As noted in the training plan table, this wage will escalate to $10.50 as of January 1, 2017 in keeping with sate minimum wage law.

Training Plan

Business Skills: Training will be provided to all occupations as related to job duties to enhance customer satisfaction and increase effective communication. Courses will include Communication Skills, Customer Needs Analysis and Customer Service skills.

Computer Skills: Training will be provided to Administrative Staff and Sales Staff on EPICORE to increase efficiency in invoicing and tracking inventory. Courses will include EPICORE, New Account Set Up and Override Defaults.

Manufacturing Skills: Training will be provided to Production Staff to enhance production efficiencies. Courses will include Programming Controllers, Quality Control Techniques and Emergency Maintenance.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS
- Communication Skills
- Customer Service
- Guideline Responses to Inquiries
- Customer Need Analysis
- Fact Based Communication

COMPUTER SKILLS
- EPICORE
- New Account Set Up
- Override Defaults

MANUFACTURING SKILLS
- Programming Controllers
- Robotic Controls
- Quality Control Techniques
- Equipment Maintenance
- Safety Procedures

Safety Training will be limited to 10% of total training hours per-trainee.

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Retrainee - Job Creation Training Proposal for:

JBE International LLC

Small Business

ET17-0138

Approval Date: July 13, 2016

ETP Regional Office: San Diego **Analyst:** M. Ray

CONTRACTOR

- Type of Industry: Technology/IT Services
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 25
  Worldwide: 25
  Number to be trained: 28
  Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 0%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $29,276
- In-Kind Contribution: $49,421

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Computer Skills	25	8 - 100	0	$1,040	$16.46*
				Weighted Avg: 40			
2	Retrainee Priority Rate SB <100 Job Creation Initiative	Business Skills, Computer Skills	3	8 - 100	0	$1,092	$13.72*
				Weighted Avg: 42			

*It will be made a condition of contract that trainees will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

- Reimbursement Rate: Job #'s 1 and 2: $26 SB Priority
- County: San Diego
- Occupations to be Trained: Administrative Support, Content Development, Sales/Marketing, Manager/Supervisor, Technical Staff, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #1: $3.42 per hour; Job #2: $1.72 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach assisted in the development of this project for a flat fee of $2,500.
- Administrative Services: TFS will also assist with administration for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2003 and located in Vista, JBE International LLC (JBEI) (www.jbei.com) provides consulting and management services using its proprietary software platform. The software platform, used for software and web development services, consists of email delivery systems, an enterprise resource planning system, a customer relations management system, and process control systems. JBEI also designs, sells, and distributes sporting goods under the brand name Kick X Sports Corp. (branded Medicus Kick X), through its proprietary web marketing platform. JBEI is a subsidiary of AAFE Products Corporation, a holding parent company with no employees.

Need for Training

JBEI competes in a market that must respond to rapid technological changes. The Company's employees lack the needed technological skills and expertise to help JBEI remain competitive. The Company must develop new, cutting-edge products and product enhancements to grow its business and deliver high quality products and services.

To realize this goal, JBEI will need to:

1. Manage the consolidation of two office locations to one location in Vista. This transition will improve communication between sales/marketing, customer service, and research/development departments to streamline overall business processes, increase productivity and resolve customer issues effectively.
2. Upgrade existing software systems (Enterprise Resource Planning and Customer Relations Management software). Each system's processes will need to be mapped to identify and eliminate issues to increase accuracy and customer satisfaction. The Company will also be adding new systems (JBE Email Delivery System).
3. Expand the Company's product offerings by designing and selling new golf training systems through its Medicus Kick X brand.

Retrainee-Job Creation

The Panel is offering incentives to companies that commit to hiring new employees. Training will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

To keep up with the expanded product offerings, JBEI will expand existing business capacity by adding new equipment and hiring employees. The Company has committed to hiring three new employees: Administrative Support, Sales/Marketing, and Technical Staff (Job Number 2). This will allow the Company to meet customer demands and service an increasing client base.

The date-of-hire will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

ETP-funded training will allow the Company to provide formalized training. Training will be delivered via Class/Lab methodology by in-house trainers and outside vendors.

Business Skills – Training will be provided to all trainees. Training will help employees improve time management and budgeting and address changes. Technical Staff will learn to use Gantt charts and decision matrices. Sales/Marketing will improve their multi-tasking and organizational skills. Manager/Supervisor and Owner will learn to effectively deal with conflicts and implement resolutions within the organization. Training will also provide employees skills to better serve customers.

Computer Skills – Training will be provided to all trainees. Extensive skills training will be in the Company's proprietary software systems. Course topics also include Quickbooks, Computer-Aided Design, Google Docs, and Microsoft Office. Trainees will become more efficient at programming, writing HTML, building complex logic into mobile applications, creating intuitive drawings, managing desktop apps, and learning code to successfully support changing technology and increased customer demands.

Modification to Increase Maximum Hours

JBEI requests to increase the maximum hours from 60 to 100 hours. The increase in the maximum training hours will allow the Company to fulfill its formalized training plan and provide workers with extensive technical skills. The Company performed a needs assessment and realized that core Technical Staff, Content Development, and Sales/Marketing required 16 hours of email EDS, 16 hours of ERP, 8 hours of CRM, 16 hours of Process Control, and more than 45 hours of various complex software and other business skills training to successfully support the Company's products and services.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 100 Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Service Skills
- Leadership Skills
- Marketing Skills
- Product Knowledge
- Sales Skills
- Project Management

COMPUTER SKILLS

- Adobe Creative Cloud
- Base Software System
- Computer-Aided Design
- Creative Deployment System
- Enterprise Resource Planning (ERP) System
- Google Docs
- iSolved Software System
- Microsoft Office Suite
- Modus Software System
- Process Control System
- Quickbooks
- Systems Administration
- Video Production
- Web Design
- Web Programming

Note: Reimbursement for retraining is capped at 100 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER

RETRAINEE - JOB CREATION

Training Proposal for:

Nellson Nutraceutical, LLC

Agreement Number: ET17-0153

Approval Date: July 12, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate	Industry Sector(s):	Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	Los Angeles, Orange	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 646	U.S.: 946	Worldwide: 1,730
Turnover Rate:	8%		
Managers/Supervisors: (% of total trainees)	7%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$96,600		$0	$0		$96,600

In-Kind Contribution:	100% of Total ETP Funding Required	$197,659

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Imp. Hazardous Mat., Mfg. Skills, PL-Mfg. Skils	100	8-200	0	$216	*$16.48
				Weighted Avg: 12			
2	Retrainee Job Creation Initiative Priority Rate	Business Skills, Computer Skills, Continuous Imp. Hazardous Mat., Mfg. Skills, PL-Mfg. Skils	150	8-200	0	$500	*$13.73
				Weighted Avg: 25			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

Minimum Wage by County: Job Number 1: $16.51 per hour for Orange County and $16.48 per hour for Los Angeles County.

Job Number 2 (Job Creation): $13.76 per hour for Orange County and $13.73 per hour for Los Angeles County.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe

Up to $1.84 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Corporate Support Staff		8
Information Technology Staff		2
Inventory/Logistics Staff		3
Maintenance/Mechanic Staff		8
Quality Staff		7
Research & Development Staff		8
Supervisor/Manager/Director		6
Sr. Supervisor/Manager/Director		4
Warehouse/Distribution Staff		14
Manufacturing/Production Staff		40

Job Number 2		
Corporate Support Staff		10
Information Technology Staff		10
Inventory/Logistics Staff		10
Maintenance/Mechanic Staff		10
Quality Staff		10
Research & Development Staff		6
Supervisor/Manager/Director		4
Sr. Supervisor/Manager/Director		4
Warehouse/Distribution Staff		10
Manufacturing/Production Staff		76

INTRODUCTION

Founded in 1962, Nellson Nutraceutical, LLC (Nellson) (www.nellsonllc.com) is a leading manufacturer and full service provider of branded and private-label nutrition bars, nutritional powders and healthy snacks. Nellson serves a wide variety of markets including retail, food service, athletic, weight management, store brands, direct to consumer and medical distribution. Nellson is headquartered in Anaheim and has an additional manufacturing facility in Irwindale. Both California locations will participate in the proposed training. The Company also maintains locations in Utah and Canada.

The Company qualifies for standard retraining under the out-of-state competition provisions as a manufacturer and is eligible for priority industry reimbursement. This will be Nellson's second ETP Agreement; however, it is the first one within the past five years.

PROJECT DETAILS

The traditional consumers of sports nutrition products have been bodybuilders and athletes; however, there is a growing number of lifestyle and recreational users looking to sports supplements for health and fitness purposes. This growing customer base is reshaping the market and driving demand for healthy and convenient lifestyle solutions that include sports nutrition products. To meet this demand and remain competitive in a rapidly growing industry, Nellson must continue to improve its production capabilities and operational efficiencies.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

Nellson has committed to hiring 150 new employees (Job Number 2) to support the Company's rapid growth and expansion of business capacity. The Company recently acquired certain powder production assets, raw materials, packaging, labeling, and in-process products previously associated with NBTY, Inc., a manufacturer of vitamins and nutritional supplements. This acquisition included the Anaheim facility that now serves as Nellson's corporate headquarters.

Presently, the majority of production at the Anaheim facility involves powder products that are placed into bottles and/or cans. However, due to customer demand, Nellson is planning to increase the volume of its packet production. The Company currently runs five shifts per month on its packet machine, but is planning to increase production to 40 shifts per month in this area. This increase in production requires that Nellson upgrade the skills of its new and existing workforce to ensure optimal use of packet production equipment and processes.

Nellson also plans to expand its Anaheim facility through significant upgrades and new state-of-the-art equipment. These plans include several new production lines, new Information Technology and Enterprise Resource Planning systems, and ongoing equipment upgrades. Nellson's new High Speed Manufacturing line, planned for later this year, will increase the Company's manufacturing capacity, allowing for new business opportunities and growth.

The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

The proposed training will enable Nellson to upgrade the skills of its existing workforce, integrate new employees, and implement process improvements designed to enhance business productivity and efficiency. Training will take place at the Company's facilities in Anaheim (Powder Division) and Irwindale (Bar Division). Training will be delivered by a combination of in-house subject matter experts and outside training vendors to be identified during the contract term.

Business Skills (25%) – Training will be offered to all occupations and will focus on customer service, communication, sales and time management skills. This training will help workers improve their customer relations and support skills, as well as equip them with the overall business acumen to effectively uphold Nellson's business principles.

Computer Skills (5%) – Training will be offered to all occupations. Training will help staff become more proficient in business software solutions in resource planning, quality control and data/information management.

Continuous Improvement (25%) – Training will be offered to all occupations. Training will focus on making the Company's processes more efficient and cost-effective. This training is designed to maximize worker productivity through the implementation of process improvements, problem-solving and teambuilding techniques.

Hazardous Materials (5%) – Training will be offered to Supervisors/Managers, Maintenance/Mechanic, Manufacturing/Production and Warehouse/Distribution Staff. This training will provide supplemental hazardous materials skills to frontline workers and lead personnel. Training will cover hazardous materials specific to Nellson's manufacturing processes.

Manufacturing Skills (40%) – Training will be offered to Supervisors/Managers, Manufacturing/Production, Maintenance/Mechanic and Warehouse/Distribution Staff. Trainees will gain the skills and knowledge to operate and maintain equipment, ensure product quality, and implement best practices in product production and food safety.

Productive Laboratory

Productive Lab (PL) trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

Nellson indicates that PL training provides the suitable environment for employees to comprehend Nellson's detailed production processes. PL training will be provided to approximately 180 Supervisor/Manager, Manufacturing/Production, Maintenance/Mechanic, and Warehouse/Distribution Staff. PL training hours will range between 0 to 60 hours per trainee, depending on experience, occupation and learning capacity. This training will help workers achieve the competencies needed to perform their jobs with the highest level of efficiency.

PL training will focus on production processing skills and equipment operation. It will involve the various manufacturing machinery used for staging, blending, filling, packaging, labeling, and palletizing. Training will be provided by qualified instructors with knowledge and expertise in Nellson's manufacturing processes and equipment. The trainer-to-trainee ratio will be 1:1, and training will be capped at 60 hours per trainee.

Commitment to Training

Nellson's training budget for its California facilities is approximately $100,000 for 2016. Company-funded training topics consist of anti-harassment, diversity, basic computer skills, new-hire onboarding, and management skills. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

Nellson has identified internal lead personnel to manage the scheduling, delivery, and documentation of training for both California facilities. The Company has also retained an outside administrative consultant to ensure that training adheres to ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Training Funding Partners (TFP) in Fountain Valley assisted with development for a flat fee of $7,400.

ADMINISTRATIVE SERVICES

TFP will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Acumen
- Communication Skills
- Customer Service/Support Skills
- Sales/Marketing Skills
- Finance/Accounting Skills
- Time Management Skills
- Presentation Skills

COMPUTER SKILLS

- Human Resource Information System Skills
- Quality Control System Skills
- New Enterprise Resource Planning System
- Master Control System Skills
- Intermediate/Advanced Microsoft Office Suite

CONTINUOUS IMPROVEMENT

- Change Management Skills
- Coaching/Feedback
- Conflict Management/Resolution
- Failure Mode Effects Analysis
- Goal Setting
- Innovation Skills
- ISO Skills
- Leadership Skills
- Process Improvement Skills
- Problem Solving
- Product Evaluation
- Project Management Skills
- Quality Assurance/Quality Control
- Six Sigma Skills
- Statistical Process Control Skills
- Team Building

HAZARDOUS MATERIALS

- Bloodborne Pathogens
- Chemicals
- Compressed Gases
- Hazard Communication
- Hazardous Material Handling
- Spill Response

MANUFACTURING SKILLS

- Change Order Process Skills
- Clinical Skills
- Data Collection/Documentation Skills
- Failure Mode Effects Analysis
- Food Safety Management
- Geometric Dimensioning and Tolerancing
- Good Documentation Practices
- Good Manufacturing Practices
- New/Updated Manufacturing Processes/Systems/Products
- Product Blending/Filling/Packaging Skills
- Production Equipment Operations and Maintenance
  - Blow Molding
  - Pharmacy Weigh Room
  - Blending
  - Filling
  - Packaging
  - Palletization
- Standard Operating Procedures
- Troubleshooting/Root Cause Analysis
- Warehouse/Logistics Skills
- Advanced Safety Skills*
  - Behavior Based Safety
  - Confined Spaces
  - Electrical Safety
  - Hoist and Rigging
  - Hot Work
  - Lifting
  - Machine Guarding and Machine Safety
  - Pedestrian Safety
  - Personal Protective Equipment
  - Powered Industrial Vehicle Safety
  - Respiratory Protection
  - Walking and Working Surfaces

*Safety Training is capped at 10% of a trainee's total training hours

Productive Lab Hours

0 – 60

MANUFACTURING SKILLS (Ratio 1:1)

- Label Operator Process Skills
- Pharmacy Operator Process Skills
- Good Manufacturing Process Skills
- Product Staging/Blending/Filling/Packaging Skills

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 60 hours per trainee.

DELEGATION ORDER

RETRAINEE - JOB CREATION

Training Proposal for:

Procore Technologies, Inc.

Agreement Number: ET17-0213

Approval Date: August 16, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Paccerelli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Technology/IT Services Priority Industry: ☒ Yes ☐ No
Counties Served:	Santa Barbara, San Francico, San Diego	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 474	U.S.: 581	Worldwide: 581
Turnover Rate:	2%		
Managers/Supervisors: (% of total trainees)	10%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$99,960		$0	$0		$99,960

In-Kind Contribution:	100% of Total ETP Funding Required	$154,224

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills; Computer Skills	255	8-200	0-36	$360	$15.60
				Weighted Avg: 20			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills; Computer Skills	17	8-200	0-100	$480	$15.60
				Weighted Avg: 24			

Minimum Wage by County:
Job Number 1: $15.60 in Santa Barbara County; $17.02 in San Francisco County; and $16.46 in San Diego County
Job Number 2: $12.77 for Santa Barbara County; $14.19 in San Francisco County; and $13.72 in San Diego County

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe

Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Job Numbers 1 & 2 Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Marketing Staff I		13
Marketing Staff II		10
Sales Staff I		17
Sales Staff II		10
Engineer I		5
Engineer II		4
Information Technology Staff I		7
Information Technology Staff II		6
Customer Success Staff I		16
Customer Success Staff II		12
Finance Staff I		5
Finance Staff II		4
Business System Analyst I		9
Business System Analyst II		7
Operation Staff I		14
Operation Staff II		10

Administration Staff I		12
Administration Staff II		12
Product Specialist I		45
Product Specialist II		27
Manager/Supervisor I		17
Manager/Supervisor II		10

INTRODUCTION

Founded in 2003 and headquartered in Carpinteria, Procore Technologies, Inc. (Procore) (www.procore.com) is a construction management software company. With an award-winning suite of project management tools, over a million registered Procore users across the globe manage all types of construction projects including industrial plants, office buildings, apartment complexes, university facilities, and retail centers.

Procore's mission is to provide construction professionals with the most comprehensive and easy to use project management platform combined with industry leading customer service. The Company helps users increase project efficiency and accountability by streamlining and mobilizing project communication and documentation. This real-time data and accessibility minimizes delays and increases profits.

Procore is eligible to contract with ETP as a single employer for standard retraining and priority-industry funding meeting out-of-state competition requirements.

PROJECT DETAILS

This will be Procore's first ETP Agreement. The Company has a solid competitive edge over other construction project management solutions located out of state. To maintain its competitive position, the Company must continually raise the skills and performance level of its employees. The proposed training is designed to enhance company competitiveness by ensuring employees are performing optimally and attaining new skills for new projects and opportunities.

ETP-funded training will enable the Company to invest in strategic Learning and Development initiatives that would have been halted as the Company grows. This includes company-wide Construction Knowledge Development which would provide a huge competitive advantage for the Company, and Leadership Skills training to help employees upgrade skills and would broaden the Company's pool of skilled workers.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

The software industry is competitive and rapidly changing; thus, Procore is expanding its business capacity, adding new employees to existing functions in Engineering, Information Technology, Sales, Marketing, Administration, Finance, Customer Service, and Operations. Procore has committed to hiring and training 17 new employees (Job Number 2) to develop new ideas, provide better service to users, and support internal staff.

Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Newly hired employees will be reimbursed at a higher rate and subject to a lower post-retention wage. Trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Class/lab and Computer-Based training will be provided in the following:

Business Skills (50%) – Training will be provided to all occupations. Training will focus on internal business systems and functionality. Trainees will learn the Company’s new and enhanced products and service offerings. Training will also cover a wide range of customer solutions, leadership, sales, marketing, goal setting, and employee/customer engagement. The goal is to create a more efficient business environment, improve quality, and reduce waste.

Computer Skills (50%) – Training will be offered to all occupations. This training includes new and upgraded software, computer programs, and advanced/intermediate MS Office. Training will help upgrade employee skillsets and facilitate the transfer of computerized data.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. In support of continuous employee development, the Company’s current California training budget is approximately $500,000 and covers new-hire orientation, personal enrichment, harassment and abusive behavior prevention, hiring skills, behavioral interviewing, and compensation training.

- Training Infrastructure

  Training will be delivered by in-house staff and outside vendors. Procore’s Senior People Operations Manager will oversee training and internal administration of this project. The Company has also retained an outside administrative consultant to ensure that all training records meet ETP compliance.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Procore retained Glendale Community College Professional Development Center (PDC) in Montrose to assist with the development of this proposal at no cost.

ADMINISTRATIVE SERVICES

PDC will also perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Construction 101
- Communication Skills
- SaaS Business
- Business Writing
- Business Communications
- Negotiation Skills
- Time Management
- Business Financial Statements
- Collaboration
- Project Management
- Interviewing Skills
- Handling Difficult Conversations
- Time Management
- Customer Service
- Sales Continuous Learning
- Marketing
- Goal Setting
- Dispute Resolution
- Customer Success
- Leadership Development Suite
- Leadership Boot Camp 1
- Leadership Boot Camp 2
- Performance Management
- Employee/Customer Engagement

COMPUTER SKILLS

- Slack
- 7GEESE
- Nexonia
- Slack
- Confluence
- Salesforce
- Samanage
- Skilljar
- Tout
- Kapost
- Okta
- Google Suite
- GoToMeeting
- SmartSheets
- New Relic
- Skuid
- Bridge
- Seismic

- Snagit
- Software advice
- Airserver
- Mindtouch
- Phraseexpress
- WalkMe
- Softphone
- Zendesk
- Sendgrid
- Talkdesk
- EcrionXF
- Fullstory
- Bugsnag
- Jira
- Airbrake
- ProjectTango
- Semaphore
- Travisci
- Coding for Non-Technical People
- Network Training
- Microsoft Excel (Advanced & Intermediate)
- Mobile Devices
- Human Resources Software

CBT Hours
0 - 36

COMPUTER BASED TRAINING (CBT)

COMPUTER SKILLS

- Microsoft Excel Level 2 (Intermediate) (2.0)
- Microsoft Excel Level 3 (Advanced) (2.0)
- North Stars (Support Basics) (.50)
- QuickBooks for Contractors Overview (1.65)

BUSINESS SKILLS

- Bidding (1.27)
- Business Ethics (.33)
- Business Skills: It's About Time – Time Management (.50)
- Communication: Delivering Effective Feedback (.50)
- Communication: Presentation and Speaking Fundamentals (.75)
- Construction 101 (4.50)
- Construction 102 (2.00)
- Product Manager On-boarding (3.00)
- Project Management Fundamentals (.75)
- Project Management Time and Schedule (.50)
- Project Planning Initiation and Scope (.50)
- Project Resource Management (.75)
- How BIM has changed the Construction Industry (.97)
- Innovation: Creative and Innovative Thinking (.55)
- Leadership: Building Trust in the Virtual Environment (.50)
- Leadership: Business Process Improvement (.58)
- Leadership: Change Management Fundamentals (.50)
- Leadership: Classic Leadership With a Virtual Twist (.50)
- Leadership: Developing a Strong Leadership Team (.58)

- Leadership: Doing Performance Reviews (.50)
- Leadership: Effective Leadership (1.00)
- Leadership: Employee Motivation (.75)
- Leadership: Inspiring and Motivating Remotely (.50)
- Leadership: People Management and Leadership Fundamentals (2.00)
- Leadership: Teambuilding/Teamwork Fundamentals (.50)
- Leadership: Using Leadership Basics (.83)
- Management: Flexibility and Managing Change (.75)
- Management: Lose the Meeting Blues (.58)
- Management: Managing Team Conflict (.67)
- Management: Running a Virtual Office (.50)
- Management: Running Effective Teams (.58)
- Management: Succeed as a Supervisor (.58)

Note: Reimbursement for retraining is capped at 200 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per trainee.

Delegation Order

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Quality Controlled Manufacturing, Inc.

Small Business

ET17-0176

Approval Date: August 12, 2016

ETP Regional Office: San Diego **Analyst:** M. Ray

CONTRACTOR

- Type of Industry: Manufacturing

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 79

  Worldwide: 79

  Number to be trained: 77

  Owner ☐ Yes ☒ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 7%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $96,096
- In-Kind Contribution: $105,299

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Continuous Impr, Mfg Skills	77	8 - 150	0	$1,248	*$16.46
				Weighted Avg: 48			

*Note: It will be made a condition of contract that these trainees will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

- Reimbursement Rate: $26 SB Priority
- County(ies): San Diego
- Occupations to be Trained: Administrative Support, Engineering, Production, Manager/Supervisor
- Union Representation: ☐ Yes ☒ No
- Health Benefits: $2.87 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1978, Quality Controlled Manufacturing, Inc. (QCMI) (www.qcmfginc.com) specializes in precision machining of all metals including exotic alloys. The Company manufactures parts, components, and complex assemblies for the aerospace, power generation, oil and gas, marine and heavy equipment industries and the Department of Defense. The Company also provides computer numerical control turning, milling, and grinding; conventional machining; welding; electrical discharge machining; fabrication; inspection; engineering; aging/annealing; non-destructive testing; assembly; and supply chain management.

This will be the second Agreement between QCMI and ETP in the last five years. In its previous ETP project, the Company was able to provide its workers with various Computer, Continuous Improvement, and Manufacturing Skills training to meet a high level of quality assurance and adaptability for industry and individual customer requirements. Since then, QCMI experienced an unprecedented growth.

Funding from the previous contract also allowed the Company to develop a succession path to fill in behind exiting workers who have been with the Company for over 20 years and are now retiring. QCMI also provided cross-training workers to perform job duties as well as promote to a higher level position.

Training need in this proposal will be driven by the Company's significant business growth and projected expansion. Specifically, QCMI added a new department to become a Federal Aviation Administration (FAA) Repair Center. The Company also recently finalized its long-term contract with an Original Equipment Manufacturer customer in Montreal, Canada; and is expanding its services to include ChemFilm (chemical conversion coating used to passivate aluminum).

Training will continue to be driven by customer and industry demands to meet stringent quality requirements. For example, the aerospace industry continues to demand high standards including AS9100 certification and systems that ensure quality standards are maintained and continuously improved.

With the help of ETP funding, QCMI is poised to develop a specific training program to successfully support the above changes and expansion.

Training Plan

Some curriculum topics are repeated from the prior ETP Agreement. However, the subject matter has been updated or revised, to ensure no duplication of training. Employees who participated in the first Agreement will receive new training in curriculum topics that will build upon the skill sets previously acquired. Some workers who were unable to participate in the Six Sigma Green Belt training provided in the previous project will now receive this training.

ETP training will begin upon approval and will be delivered at the Santee location by mostly in-house trainers; however, the Company may acquire training vendor/s to deliver training during the training period of this project. Training will be delivered via the following Class/Lab training in the following skills:

Business Skills: Training will be offered to all occupations. Training topics include business writing, business analysis, presentation skills, communication, and cost benefit analysis to improve customer relations as well as enhance skills necessary to obtain new markets, customers and businesses.

Computer Skills: Training will be provided to all occupations. Enterprise Resource Planning training will ensure trainees the effective use of the system. SolidWorks and Mastercam training will continue to allow Engineering and Production Staff to successfully explore the capabilities of the Company's computer-aided design and manufacturing tool software. Visual Fair training will provide Production Staff the skills to improve quality, eliminate waste and reduce lead time.

Continuous Improvement: Training will be offered to all occupations. All trainees will receive a wide spectrum of Six Sigma Green Belt, Lean Manufacturing, Quality Systems, Internal Auditor, ITAR, and AS9100 training needed to successfully increase customer sales while complying with quality systems requirements.

Manufacturing Skills: Training will be offered to Production and Managers/Supervisors. Training will include Blue Print Reading, Machine Set-up/Operation, Shop Inspection, Non-Destructive Testing and FAA Repair Procedures. Training in these areas will continue to

promote substantial investment in employee development to support business growth and become a significant California FAA repair center in the marketplace.

Modifications

Increase in Range of Hours

In its previous project, QCMI, as a small business, requested an increase in the maximum hours from 60 to 200 for incumbent and 60 to 150 for Job Creation trainees. As shown in the Prior Projects Table, performance was 100%. (There is no Job Creation in this proposal.)

The Company is again requesting to increase the maximum hours for incumbent trainees. As before, QCMI requests an increase in the maximum hours from 60 to 150. The increase in training hours will allow the Company to provide some workers initial exposure to Six Sigma as well as move staff towards Phase II of Green Belt training in Quality Clinic Root Cause, Corrective Action, and Value Stream Mapping.

The weighted average hours are 48 hours for all trainees. QCMI completed 72 weighted average hours in the prior Agreement.

Contract Term

For the same reason mentioned above, although the standard term of contract for Small Business is 12 months, QCMI requests a 24-month term of contract.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by QCMI under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET14-0329	Santee	5/5/14 – 5/4/16	$89,960	$89,960 (100%)

QCMI documented 3,605 eligible training hours to equal more than the Agreement amount. Per the Contract Status Report in the ETP Tracking System, the Company should earn $89,960 which is 100% of the Agreement amount in potential earnings for 50 trainees. The Final Invoice Closeout has been submitted and is in process.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 150 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Writing
- Business Analysis
- Presentation Skills
- Communication Skills
- Cost Benefit Analysis

COMPUTER SKILLS

- Mastercam
- Microsoft Office
- Enterprise Resource Planning
- SolidWorks
- Visual Fair

CONTINUOUS IMPROVEMENT

- Six Sigma Green Belt
- Lean Manufacturing
- Quality Systems
- Team Building
- Leadership Skills
- Internal Auditor
- AS9100
- International Traffic in Arms Regulations

MANUFACTURING SKILLS

- Blueprint Reading
- Machine Set Up
- Machine Operation
- Shop Inspection
- Federal Aviation Administration Repair
- Non-Destructive Testing

Safety Training will be limited to 10% of total training hours, per-trainee.

Note: Reimbursement for retraining is capped at 150 total hours, per-trainee, regardless of method of delivery.

DELEGATION ORDER

RETRAINEE - JOB CREATION

Training Proposal for:

Quality First Home Improvement, Inc.

Agreement Number: ET17-0102

Approval Date: July 22, 2016

ETP Regional Office: Sacramento **Analyst:** M. Jones

PROJECT PROFILE

Contract Attributes:	SB <100 Priority Rate Retrainee Job Creation Initiative SET	Industry Sector(s):	Construction Priority Industry: ☒ Yes ☐ No
Counties Served:	Sacramento, Contra Costa, Santa Clara	Repeat Contractor:	☐ Yes ☒ No
Union(s):	☐ Yes ☒ No		
Number of Employees in:	CA: 80	U.S.: 93	Worldwide: 93
Turnover Rate:	12%		
Managers/Supervisors: (% of total trainees)	19%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$50,050		$0	$0		$50,050

In-Kind Contribution:	100% of Total ETP Funding Required	$163,335

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100 SET	Business Skills, Commercial Skills, Computer Skills, Cont. Imprv., HazMat, Mgmt. Skills, OSHA 10/30	28	8-60	0-2.5	$780	$20.55
				Weighted Avg: 30			
2	Retrainee Job Creation Initiative Priority Rate SB<100 SET	Business Skills, Commercial Skills, Computer Skills, Cont. Imprv., HazMat, Mgmt. Skills, OSHA 10/30	31	8-60	0-2.5	$910	$13.13
				Weighted Avg: 35			

Minimum Wage by County: Job Number 1 (SET): Statewide hourly wage of $20.55. Job Number 2 (Job Creation): $13.13 per hour for Sacramento County, $13.70 per hour for Contra Costa and Santa Clara counties.
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $1.38 per hour may be used to meet the Post-Retention Wage for Job Number 1 and Job Number 2.
Additional Compensation: Wages for Canvass Field Trainers and Telemarketers include an "incentive bonus" proportionate to sales. The bonus/commission is regularly reported. Wages for Installers are paid by "piece rate" plus $10 per hour for travel and rest time. This is also regularly reported. See further discussion at Page 5 of this proposal.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1		
Frontline Manager		6
Canvass Field Trainer		4
Frontline Supervisor		1
Install Crew Lead		6
Installer		5
Assistant Project Coordinator		3
Project Coordinator		3

JOB NUMBER 2		
Frontline Manager		5
Administrative Staff		2
Install Crew Leader		4
Installer		5
Customer Support Staff		1
Telemarketer		14

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

INTRODUCTION

Founded in 2006 in and now established in Citrus Heights, Quality First Home Improvement, Inc. (Quality First) (http://www.qualityfirsthome.com) is a home improvement company with a focus on conservation and energy saving product lines. The Company sells, finances, installs and services home improvement and energy saving products. Its customers are residential homeowners and commercial businesses. Quality First will have 3 locations participating in this proposal located in Citrus Heights, Campbell and Concord.

PROJECT DETAILS

Quality First recognizes that recent industry regulations, employee relations, innovative products and technology demands will require employees to increase their skills and knowledge in the home improvement industry. The Company has devised a strategic plan to restructure operations, reposition key personnel, change methodologies to adapt to economic factors, and improve operational inefficiencies to remain competitive. To accomplish this, Quality First will be implementing management training for new Managers, scheduling various manufacturers to train Installers and Sales Staff on new products, and implement new technology applications to improve processes. The Company also wants to preserve company stability without sacrificing quality; therefore staff has a significant need for continuous improvement training.

The Company is requesting ETP funds to ensure trainees have the skills and knowledge to properly install new products, manage projects, communicate effectively with customers and vendors, and utilize new software applications. Employees will also be cross-trained which will increase productivity and efficiency throughout the Company. Workers will learn to work in teams, redesign process and workflow, and reduce costs.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.

Quality First is expecting to expand their facilities and services within the next two years. In 2015, the Company's marketing plan was implemented successfully, increasing their sales by 22.3% company-wide. As sales continue to grow, additional employees are needed to meet the demand. The Company also plans to open a Solar Division in both the Campbell and Concord locations by October 2016, both of which will require the hiring of additional staff. In April, the Company started implementing a Commercial Division in the Sacramento office and plans to expand it to the Concord office. The proposed training will equip new employees with the

knowledge and understanding of products and services, operating procedures and the influences of industry regulation. To support this growth, the Company will need to hire new Administrative Staff, Install Crew Leaders, Installers, Customer Support Staff and Frontline Managers.

Quality First has committed to hiring 31 new employees (Job number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Trainees will receive between 8-60 hours of Classroom/Laboratory training. Training will be delivered by both in-house subject matter experts and outside vendors to be identified during the contract term.

Business Skills (15%) – This training will be provided to all occupations to provide the skills necessary for effective job performance. This training will focus on employee relations, proper company communications, time management, and work flow processing to improve customer service skills, and enhance sales and marketing techniques. Training topics will include Marketing, Communication: Creating Shared Understanding, and Cost Accounting.

Commercial Skills (10%) – This training will be provided to Frontline Manager and Installer to learn the proper installation skills needed for the Company’s home improvement products. This training will qualify staff with a “certified status” providing them the edge in product installation and customer confidence. Training topics will include Managing Change, Leadership Styles, and Installation Production.

Management Skills (15%) – This training will be provided to Frontline Managers and Frontline Supervisors to learn leadership qualities, be more efficient in problem solving and gain necessary skills to be confident leaders. Training topics will include Qualities of a Leader, Management Skill training, and Identifying and Solving Problems.

Computer Skills (15%) – This training will be offered to all occupations to provide efficiency and the necessary tools to manage and report information in a timely manner that impacts operational decisions. Training topics will include Data Forma-Web based CRM, QuickBooks and Sol Metric Sun Eye training.

Continuous Improvement (30%) - This training will be provided to all occupations to improve products, services, and processes, while engaging in effective problem solving challenges and team building opportunities. Training topics will include Team Building, Conflict Resolution, Managing Diversity, and Time Management and Effective Delegation.

Certified Safety Training (15%)

<u>OSHA 10/30</u> - This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

<u>Hazardous Materials (HAZMAT)</u> - This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour

annual refresher, and may be delivered by classroom or CBT. In this proposal, all occupations will receive up to 24 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, the certification entity has not yet been determined.

Incentive Bonus

Wages may include an "incentive bonus" payable to Canvass Field Trainers at up to $2.17 an hour; and to Telemarketers at up to $1.32 an hour. The bonuses are designed to incentivize sales, in the manner of commissions. These are full-time W2 employees; their bonuses/wages are routinely and regularly reported in payroll. Commission employees must receive at least the State minimum wage as a base rate.

Piece Rate

Installers are paid by "piece rate" at a set dollar amount per unit, plus $10.00 per hour for travel and rest time. These are full-time W2 employees, with wages routinely and regularly reported in payroll. Piece rate employees must be paid at least the State minimum wage as a base rate. In fact, the Company reports, these employees historically average $15.00 per hour exclusive of compensation for travel and rest time.

Note: California Labor Code Section 226.2 (AB 1513, eff. Jan. 1, 2016) requires employers to pay at least the State minimum wage rate to piece rate employees. Employers must also compensate piece rate employees for travel and rest time, using an hourly wage rate scaled to State minimum wage. Piece rate employees must be paid these threshold wages on a semi-monthly basis with an itemized statement of earnings tied to payroll reporting.

Special Employment Training

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period. For Priority Industries the wage is reduced by 25% to $20.55. Quality First is requesting this modification for Job Number 1. The trainees in Job Number 2 are also funded under SET. However, these Job Creation trainees qualify for the newly-hired wage by county as shown under the Training Plan Table.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. The Company spends approximately $97,000 annually on ongoing training in the areas of company orientation, job-specific engineering and quality skills, general office skills, and on-the-job training as needed. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Quality First retained e-VentExe in Granite Bay to assist with development of this proposal for a flat fee of $2000.

ADMINISTRATIVE SERVICES

Quality First also retained e-VentExe to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Inventory Control Training
- Job Costing/Process
- Cost Accounting
- Telephone Etiquette
- Sales
- Marketing
- Canvass Training
- Respect is Earned
- World Class Customer Service Culture
- Innovation and Creativity: How to Improve Performance and Faster Growth
- Fundamentals of Strategic Planning
- Communication: Creating Shared Understanding
- Setting Smart Goals: Reviewing the Vision Statement
- Customer Skills

COMMERCIAL SKILLS

- Sol Metric Sun Eye Training
- Burnham Solar World Evaluations of Solar System Training
- Solar Enphase Training
- Product Installation Training
- Servicing of Equipment Training
- Equipment Maintenance and Safety
- Using Hand Tools Properly
- Harnessing: Roof Installs/Solar Installs
- Product Certification
- Certification of Proper Product Installation
- Installation Production
- Performance management/Appraisal Process
- Managing Change
- Leadership Styles
- Safety
    - Preventing Slips, Trips and Falls
    - Electrical Safety
    - Heat and Illness Prevention
    - Proper Lifting Procedures
    - Personal Protective Equipment
    - Fire Safety (Installers Only)
    - Driver Safety
    - Blood Borne Pathogens

COMPUTER SKILLS

- Data Forma-Web Based CRM
- Sol Metric Sun Eye Training
- Burnham Solar World Evaluations of Solar System Training
- Quickbooks
- Microsoft Office (Intermediate/Advanced)
- Microsoft Excel (Intermediate/Advanced)

CONTINUOUS IMPROVEMENT:

- Team Building: Working Well with Others
- Installation Management/Measurement/ Quality-Control/Targets
- Effective Results/Hitting Goals
- How to Control Accounts Receivable
- Management/Leadership Development
- Remember the Small Stuff: A Class on Memorization
- How to Build a More Open and Positive Work Environment
- Conflict Resolution
- Confronting the Tough Stuff
- Motivating Employee's Successfully
- Managing Diversity
- Coaching and Counseling
- Time Management and Effective Delegation

HAZARDOUS MATERIALS:

- Lead Abatement
- Lead Containment and Disposal
- HazCom

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10 (Requires Completion of 10 Hours)
- OSHA 30 (Requires Completion of 10 Hours)

MANAGEMENT SKILLS (Managers and Supervisors Only)

- Up and Comer: Preparing for Management
- Leadership Development – Sales, Marketing, Canvass, and Installation
- Qualities of a Leader
- 10 Steps to Sales
- 6 Steps to Marketing
- Motivation through Education
- Performance Reviews
- How to Build a Tenure Team
- Identifying and Solving Problems
- Making the Transition to Management
- Behavioral Interviewing
- Critical Thinking
- Improve Business Results Using Emotional Intelligence
- How to Build a More Open and Positive Work Environment
- Improving Sales Skills

- Improving Marketing Skills
- Management Skill Training
- Media Marketing
- Game Plan/Goal Training

Safety Training cannot exceed 10% of total training hours per-trainee
(This cap does not apply to OSHA 10/30)

CBT Hours

0-2.5 **COMMERCIAL SKILLS**

- Safe Driving Training (2.5 hrs.)

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee excluding OSHA 10/30.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Saddleback Roofing, Inc.

Small Business

ET17-0165

Approval Date: July 25, 2016

ETP Regional Office: San Diego **Analyst:** M. Ray

CONTRACTOR

- Type of Industry: Construction
  Services
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 55
  Worldwide: 55
  Number to be trained: 38
  Owner ☐ Yes ☒ No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 10%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $39,520
- In-Kind Contribution: $51,300

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET SB <100 Priority Rate	Commercial Skills	38	8 - 60	0	$1,040	$23.00
				Weighted Avg: 40			

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): Orange
- Occupations to be Trained: Roofer and Foreman
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1956, Saddleback Roofing, Inc. (SRI) (www.saddlebackroofing.com) provides roof installation, replacement, repair, and coating services to building owners, developers, and property managers. Located in Orange, the Company also provides roof maintenance program services to industrial and commercial roofing customers.

For more than 100 years, “built-up roofing” (commonly referred to as “tar and gravel” roof) has been the dominant roofing system used by customers in the US. This roof system is generally composed of alternating layers of bitumen and reinforcing fabrics that create a finished membrane. The roofing industry has seen a dramatic shift of customers demanding different types of roofing systems, specifically, single-ply, which is flexible sheets of compounded synthetic materials manufactured to strict quality control requirements. These changes are transforming the roofing industry. SRI must expand services and increase the quality of its products.

The roofing industry has been experiencing a severe labor shortage, driving up costs in a competitive market. Due to customer demands and the small pool of available skilled commercial roofers, the Company must develop and implement an extensive training program

initiative. The Company will extensively train novice laborers and cross-train existing roofers and foremen in various roofing systems in order to remain competitive.

ETP funding will help SRI to deliver a comprehensive training program to meet strategic initiatives and support its business goals. Training will provide staff improved skill. Training will enable the Company to successfully upgrade worker skills, ensure project integrity, and effectively manage business growth.

SRI is eligible for ETP funding under Special Employment Training (SET) provisions for frontline workers not threatened by out-of-state competition. The Company qualifies for ETP's priority industry reimbursement as a roofing contractor.

Training Plan

SRI designated its General Manager to administer, implement, and manage the ETP program. The Company also designated an administrative staff to fully support the scheduling, enrolling, and tracking of training hours.

Training will be provided by both in-house trainers and outside vendors. Training will be delivered in a structured classroom and laboratory (simulated) environment at SRI's Orange facility in the following:

Commercial Skills – Training will be offered to all trainees. Course topics will include Single-Ply, Built-up, Tile, and Torch-Down Roofing Systems Procedures. Each system will require comprehensive training for workers in attachment methodology and installation.

SET Priority Industry Wage Modification

For trainees employed in a priority industry, the Panel may modify the SET Wage ($28.37) up to 25% below the statewide average hourly wage to $21.28. This wage modification is intended to train workers in lower wage occupations to provide opportunities for promotion, wage increases, and long-term job security. SRI requests this wage modification.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 60 Trainees may receive any of the following:

COMMERCIAL SKILLS

- Single-Ply Roofing Procedures
  - Membrane Overview
  - Attachment Methodology
  - Approved/Non-Approved Details
  - Options of Installation
  - Hands On Installation Techniques
- Built-up Roofing Procedures
  - Membrane Overview
  - Attachment Methodology
  - Approved/Non-Approved Details
  - Options of Installation
  - Hands on Installation Techniques
  - Hot Asphalt Laying Techniques
- Tile Roofing Procedures
  - Product Overview
  - Attachment Methodology
  - Approved/Non-Approved Details
  - Options of Installation
  - Hands on Installation Techniques
- Torch-Down Roofing Procedures
  - Membrane Overview
  - Attachment Methodology
  - Approved/Non-Approved Details
  - Options of Installation
  - Hands on Installation Techniques
  - Torching Techniques

Note: Reimbursement for retraining is capped at 60 total hours, per-trainee, regardless of method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

SigmaTron International, Inc.

Agreement Number: ET17-0164

Approval Date: August 16, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** L. Lai

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee	Industry Sector(s):	Manufacturing Priority Industry: ☒ Yes ☐ No
Counties Served:	Alameda	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☐ Yes ☒ No		

Number of Employees in:	CA: 194	U.S.: 487	Worldwide: 2,728
Turnover Rate:	5%		
Managers/Supervisors: (% of total trainees)	6%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$58,860		$0	$0		$58,860

In-Kind Contribution:	100% of Total ETP Funding Required	$102,571

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Computer Skills Con't Improve. Mfg. Skills	109	8 - 200	0	$540	*$17.02
				Weighted Avg: 30			

Minimum Wage by County: $17.02 for Alameda County
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $3.16 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff (Document Control, Buyers, Quotation)		22
Engineer		7
Production /Assembler		73
Manager/Supervisor		7

*It will be made a condition of contract that trainees will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

INTRODUCTION

Located in Union City, SigmaTron International, Inc. (SigmaTron) manufactures DC-to-AC inverters, coils, transformers, cable and harness assemblies. The Company also assembles printed circuit boards and provides box build services (integrated printed circuit boards and other manufacturing and assembly technologies with high level sub-assemblies and end products) and testing of assemblies and finished products.

PROJECT DETAILS

This will be SigmaTron's second proposal in the last five years. The previous Agreement focused on new regulations of Restriction of use of Hazardous Substances directive and ISO and ITAR certifications. This proposal will focus on expansion (including the acquisition) and new equipment, including some courses for ISO and Institute of Printed Circuits certification to standardize assembly and production processes. Some courses may have been repeated from the previous Agreement. However, only employees who were not involved in the previous Agreement will receive these courses. Training will not be duplicated.

SigmaTron acquired Mentzer Electronics Manufacturing (Mentzer) last year. The acquisition merges the operations, processes, and equipment of both businesses. Training will broaden employee knowledge of both companies' products and services to better meet customer demands.

Additionally, the Company recently invested over $190,000 in several new pieces of equipment (training was not included in the purchase price): Fuji Flexa, Fuji AIMEX, BTU Pyramax 12N, PTS275-Water Circulation System, 5 Axis and ACE Selective Wave Soldering machine. Training will help employees operate and maintain the equipment.

Training Plan

The Company plans to provide the following class/lab training at its Union City facility:

Computer Skills (20%): Training will be offered to all occupations. Training will provide employees with skills to use various software and data management systems effectively.

Continuous Improvement (50%): Training will be offered to all occupations. Training will focus on quality assurance, production processes to obtain ISO and IPC certifications, and quality management principles. Workers from all business units will learn to identify and evaluate processes. A train-the-trainer component will equip Managers/Supervisors with knowledge and skills to become effective trainers.

Manufacturing Skills (30%): Training will be offered to all occupations. The training will allow Production Staff and Technicians to gain cross-functional knowledge to properly calibrate, verify, and maintain various instruments and equipment. Administrative Staff (Document Control, Buyers, and Quotation Staff), Engineers, and Manager/Supervisor trainees will receive training to better understand the manufacturing and assembly processes to provide information and data to customers.

Commitment to Training

SigmaTron spends approximately $20,000 annually for training at its Union City facility. Training includes company orientation, compliance training and some basic job-specific training.

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

A Production Manager and an HR Administrator will oversee the training implementation, schedule all training and resources, and handle all ETP administrative responsibilities. Training will be delivered by internal subject-matter experts and vendors when necessary.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by SigmaTron under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET12-0308	Union City	03/05/2012–03/04/2014	$41,472	$41,472 (100%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 200

Trainees may receive any of the following:

COMPUTER SKILLS

- Agile
- Business Work
- Database Management
- File Management
- IScore
- Macola
- Program Management Software
- Visitor Management
- VPN Remote
- Wallaby

CONTINUOUS IMPROVEMENT

- 5S
- Analysis of Data
- Customer Feedback Analysis
- ESD (Electro Static Discharge)
- FOD (Foreign Object Debris)
- IPC-A-610 – Electronic Assemblies Quality Standards
- ISO 13485 – Medical Industry Quality Standards
- ISO 9001– Business Quality Standards
- ISO AS9100 – Aerospace
- Leadership Training
- Process Failure Mode Effective Analysis
- Program Management (Documentation)
- Sig Sigma
- Train-the-Trainer

MANUFACTURING SKILLS

- 5DX Laminography
- AOI (Automatic Optical Inspection)
- Cables Assemblies
- Cables/Wires Automatic Equipment
- Chassis Build
- Hazardous Materials Handling and Storage
- IPC J-STD 001 Training
- Machines, Programs, Systems Set-Up
- Non-Conformal Material Report
- New Equipment Use and Maintenance
- Printed Circuit Board Assembly Processes
- Procedure for Validation
- Product Identification and traceability
- Qualification Process Control

- Special Pin Through Hole Assembly Equipment
- System Test
- Systems Integration/Assembly

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Retrainee - Job Creation Training Proposal for:

Stack Labs, Inc.

Small Business

ET17-0143

Approval Date: July 25, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** V. Estrada

CONTRACTOR

- Type of Industry: Manufacturing

  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees

  California: 33

  Worldwide: 36

  Number to be trained: 37

  Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 9%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $9,620
- In-Kind Contribution: $5,888

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Commericial Skills, Continuous Impr	31	8-60	0	$260	$25.00
				Weighted Avg: 10			
2	Retrainee Job Creation Initiative SB <100 Priority Rate	Business Skills, Computer Skills, Commericial Skills, Continuous Impr	6	8-60	0	$260	$25.00
				Weighted Avg: 10			

- Reimbursement Rate: Job #'s 1 and 2: $26 SB Priority
- County(ies): Alameda
- Occupations to be Trained: Chief Officers/Vice President, Engineers, Owner, Managers, Sales/Business Staff, Technical Staff
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: CBC Solution in Campbell will provide training services for Commercial and Continuous Improvement courses.

OVERVIEW

Founded in 2013 and located in Cupertino, Stack Labs, Inc. (Stack) (www.stacklighting.com) designs and manufactures responsive lighting solutions that enhance daily comfort while saving energy. Stack's first lightbulb, the Stack Classic, is the world's first fully responsive light bulb that can automatically adjust to its environment. For example, the Stack Classic maintains the right color of light, from a cooler blue-white in the morning to a warmer yellow-white at night, to set the right mood and be in tune with the surrounding space and time of day. Customers include residential properties and commercial offices.

Need for Training

Training will focus on improving Stack's business operations by providing its staff with skills in business administration, strategic planning, and project management. The lighting industry is highly competitive with new innovations in energy consumption occurring constantly. Therefore, Stack's employees need training to maintain and improve their skills to keep current with industry demands. Using both in-house and outside vendors, Stack will advance their employees' skillset to improve communication, adjust to industry demands, and maximize efficiency.

Training will allow the Company to adjust to the demands of its growing business (it has doubled in size over the past year.) Additionally, the Company has been preparing to release its new product, the Stack Downlight. Product knowledge will help the Company adequately service the new product.

Retrainee - Job Creation

The Panel is offering incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

In 2015, in response to the development and eventual release of its first product, Stack hired a total of 20 new employees. For this proposal, the Company has committed to hiring 6 new employees (Job Number 2) to prepare for the release of a new product. The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of the contract.

Training Plan

Trainees will receive the following courses via Class/Lab:

Business Skills - Training will be offered all to occupations. Topics include project management, communication skills, and business administration. Training will drive work teams to be highly skilled in initiating, planning, and executing company goals.

Commercial Skills - Training will be offered to all occupations. Topics include cloud-based communication technology, web-based camera integration, and industry standards. Training will increase industry knowledge so trainees can be up-to-date with technology.

Computer Skills - Training will be offered to all occupations. Topics include computer programming, high-performance Wi-Fi technology, and cloud-based storage. Trainees will gain a full understanding of how bulbs and sensors operate while increasing product knowledge.

Continuous Improvement - Training will be offered to all occupations. Topics include problem-solving, process improvement, and performance management. This training will result in improved problem-solving and communications and increased efficiencies in the workplace.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 60

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Performance
- Communication Skills
- Small Business Administration

COMPUTER SKILLS

- Computer Programming
  - C++
  - Cloud-Based Storage Advancements
  - High Performance Wi-Fi Technology
  - Java
  - Python
- Overview of High Performance Wi-Fi Technology

COMMERCIAL SKILLS

- Emerging Technology Fabrication & Testing:
  - Cloud-Based Communications Technology
  - Web-Based Camera Integration
- Global Market Requirements
- Mandatory Market Requirements for North America
- Voluntary Industry Standards for North America

CONTINUOUS IMPROVEMENT

- Coaching
- Customer Value of Industry Compliance
- Decision Making
- Developing Teams
- Evaluations
- Leadership Skills
- Motivation
- Performance Management
- Problem Solving
- Process Improvement
- Project Management
- Strategic Planning
- Teambuilding
- Value of Industry Compliance

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

STK Architecture, Inc.

Small Business

ET17-0199

Approval Date: August 12, 2016

ETP Regional Office: San Diego **Analyst:** H. Bernard

CONTRACTOR

- Type of Industry: Services
  Architecture
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 12
  Worldwide: 12
  Number to be trained: 12
  Owner ☒ Yes ☐ No
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 0%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $12,480
- In-Kind Contribution: $16,488

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Comm'l Skills Computer Skills Mgmnt. Skills	12	8-60	0	$1,040	$20.50
				Weighted Avg: 40			

- Reimbursement Rate: $26 SB Priority
- County(ies): Riverside
- Occupations to be Trained: Owners, Project Managers, Draftpersons, Administrative Staff
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Propel Consulting Group in El Dorado Hills assisted with development services for a fee of $900.
- Administrative Services: Propel ConsultingGroup will also assist with administration services for a fee not to exceed 7.5% of payment earned.
- Training Vendors: Blanding Consulting located in Murrietta will deliver Computer Skills training. Other training vendors to be determined.

OVERVIEW

Founded in 1969, STK Architecture, Inc. (STK) (http://www.stkinc.com) is a full-service architectural and interior design firm in Temecula. It serves public and private clients both within California and nationally. STK offers a full range of services include architectural design, interior design, master planning, sustainable design and energy efficiency assessments.

STK anticipates a revenue growth of 10-20% in the next year. Keeping in line with last year's growth it anticipates hiring new staff, but is not requesting Job Creation. STK specializes in designing and planning for fire stations and multiplex movie theaters, which requires training to ensure staff is up-to-date on the industry's latest changes. For example, more theater multiplexes are requiring different types of seating such as recliner and new features such as bar areas and cafes.

Additionally, energy efficiency building standards are constantly changing, requiring STK to stay abreast. The Company must continuously update its software for design and planning, specifically 3D drafting. STK also plans to provide training in leadership, team building and communication skills to work better together as a cohesive whole.

Training Plan

STK's training plan will provide classroom training focusing on: technology and software updates; changing building codes; and energy-efficient products. Training will be provided onsite at the location in Temecula. The Company will utilize outside training providers and in-house trainers.

Business Skills: Training will be offered to all occupations. This training will assist the staff to effectively manage projects from start to finish. Topics include proposal writing and project management, cost controlling, customer service, construction accounting/administration and IT management.

Commercial Skills: Training will be offered to Owners, Project Managers and Draftpersons. This training will focus on new energy efficiency and regulatory updates. This training will also include technical training on building codes.

Management Skills: Training will be offered to Owners and Project Managers. Topics include coaching, decision making and leadership.

Computer Skills: Training will be provided to all occupations. This training will focus primarily on the Company's design software, Revit 3D, and software updates. Training will include new accounting software, marketing software and intermediate Microsoft Office on a limited basis.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours
8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting Skills
- Marketing Techniques
- Customer Service
- Communication Skills
- Proposal Writing
- Construction Administration
- IT Management
- Client Development
- Project Management
- Business Performance
- Profit Management
- Time Management

COMMERCIAL SKILLS

- Machine Training
- Product Training
- LEED/Sustainable Building
- Code/Regulatory Building Compliance
- Technical Substance
- Technical Standards
- Construction Observation
- Spec Writing

COMPUTER SKILLS

- Revit 3D Software/Autodesk
- Adobe InDesign Marketing Software
- Deltek Ajera Accounting Software
- Intermediate/Advanced MS Office
- Intermediate/Advanced Adobe

MANAGEMENT SKILLS (Owners/Managers Only)

- Leadership Skills
- Team Building
- Problem Solving and Decision Making
- Client Communications

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.

Retrainee - Job Creation Training Proposal for:

T.G.I.F. Body Shop, Inc.

Small Business

ET17-0167

Approval Date: August 2, 2016

ETP Regional Office: San Francisco Bay Area **Analyst:** R. Jackson

CONTRACTOR

- Type of Industry: Services

  Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees

  California: 22

  Worldwide: 22

  Number to be trained: 19

  Owner ☒ Yes ☐ No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 6%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $18,040
- In-Kind Contribution: $23,210

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET SB <100	Cont. Imp., Business Skills, Computer Skills, Commercial Skills, HazMat, PL-Commercial Skills	16	8-60	0	$880	$28.37
				Weighted Avg: 40			
2	Retrainee SET SB <100 Job Creation Initiative	Cont. Imp., Business Skills, Computer Skills, Commercial Skills, HazMat, PL-Commercial Skills	3	8-60	0	$1,320	$14.19
				Weighted Avg: 60			

- Reimbursement Rate: Job #'s 1 & 2: $22 SB Non-Priority
- County(ies): Alameda
- Occupations to be Trained: Estimator, Technician, Owner, Administrative Staff, Manager
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Job #'s 1 & 2: $2.31 per hour

  Only an estimated seven employees of nineteen were identified as needing health benefits to meet ETP's wage requirement.

SUBCONTRACTORS

- Development Services: Synergy Management Consultants LLC in Grass Valley, assisted with development for a flat fee of $1,440.
- Administrative Services: Synergy Management Consultants LLC will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: Inter-Industry Conference on Automotive Repair, in Los Angeles will deliver Commercial Skills training.

OVERVIEW

Founded in 1980, T.G.I.F. Body Shop, Inc. (TGIF) (www.tgifauto.com) provides automotive repair services and sales of parts and accessories. The Company has one facility located in Fremont, CA.

Rapid business growth fueled by new government repair fleet contracts with the City of Fremont, and industry changes, are presenting the need for TGIF to hire additional staff and upgrade encumbent staff skills.

TGIF invested $26,000 in new equipment in 2016. The Company confirmed that a needs assessment was performed which aided in the design of the curriculum. Also, the Company has an internal staff that will administer the agreement along with the assistance of their administrative subcontractor, Synergy Management Consulting, LLC.

Larger multi-state automotive repair competitiors have increased their markets locally over the last three years. For TGIF to remain competitive, staff needs to train on new industry conditions to increase the types of vehicles they can service. TGIF conducts specialty repairs for new aluminum body vehicles supported mainly by Direct Repair Programs which consists of several participating insurers. Manufacturers have specific certification requirements for technicians to be eligible to service their vehicles. The proposed plan includes the certification trainings required by vehicle manufactures.

The automotive collision repair industry experiences frequent changes to processes and materials as new model vehicles must meet Corporate Average Fuel Economy (CAFE) standards set by the U.S. federal government. CAFE standards are requiring a much higher level of fuel economy. To meet CAFE standards, manufacturers are reducing the weight of new vehicles by incorporating materials such as aluminum, ultra high strength steels, borons, and composites. These new materials and methods of vehicle construction require different methods of repair. Alternative fuel, hybrid technology and electric vehicles also require different repair methods. These changes create the need to re-tool the auto repair shop and retrain employees to handle repairs, and to provide accurate estimates. Industry specific training such as Inter-Industry Conference on Auto Collision Repair (ICAR) and Automotive Service Excellence are examples of training standard expectations set by insurance companies. Training in software systems and quality improvements are necessary to ensure consistency, timely reporting to insurance companies, and improved customer service.

Retrainee - Job Creation

TGIF will hire and train 3 new employees (Job Number 2). TGIF projects a 15% (2016-17) revenue growth from parts and automotive repair services. Increased business demand necessitates the hiring of new employees. TGIF has increased production shifts to accommodate new government contracts to service fleet vehicles for the City of Fremont. Due to rapid changes in the automotive industry, including the materials used in manufacturing cars, there are gaps in skills between graduating classes of automotive repair technicians and the actual work environment demands. Therefore, new employees are required to be trained on the job, which requires more intense hours of training. The newly-hired employees will work and train at TGIF's single Fremont location.

The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of the contract.

Training Plan

Training will be provided by in-house trainers and outside vendors in the following:

Business Skills - Training will be provided to Administrative Staff, Estimator and Manager. This training is necessary for employees to understand the sales and claims processes and to understand how their job function impacts the total customer experience. Topics such as Customer Care and Communications will be provided.

Commercial Skills - Training will be provided to Technicians, Estimators and Managers. Training will include maintenance, service, new vehicle technologies, aluminum, electric and hybrid repair, and extended ICAR certifications. ICAR includes sub-topics certifications for Honda, Mercedes, Lexus, BMW, Toyota, Ford, and other specific original equipment manufacturers. Sales Staff will need commercial skills training to understand the changes in manufacturing processes in order to be able to accurately estimate damages and create repair plans for the Technicians.

Computer Skills – This training will be delivered to all occupations. The collision industry has seen changes in how insurers and other partners exchange data. Direct Repair Programs require trainees to be knowledgable on new processes and procedures. Computer Skills training will enable the Company to use IT systems to track costs; plan production; and, service flow while communicating with customers, potential customers and employees. Topics such as CCC One, and Mitchell software for client management and MS office will be provided. Estimators require computer skills training to efficiently complete work orders.

Continuous Improvement - Training will be provided to Technicians, Estimators, Adminstrative Staff and Managers to improve quality, cycle time, and cost efficiency by implementing Lean production and quality control processes. TGIF expects to increase efficiency by 15% with Continuous Improvement training. Topics such as Root Cause Analysis, Team-building, and Standard Operating Procedures will be provided.

Hazardous Materials – Training will be delivered to Estimators, Technicians and Managers. Training will cover hazardous materials handling and disposal. Toxic debris, waste, and other contaminated materials are often produced during automotive repair work. Training will give trainees the skills needed to manage materials encountered during collision repair and clean-up. This training is not regulated or certified safety training. Training topics such as Emergency Clean up, Volatile Organic Compund Tracking, and Completing Materials Safety Data Sheets will be provided.

Productive Laboratory

Trainees may produce goods for profit as part of PL training, in the courses identified under the Curriculum. Training will be at a 1:1 trainer-to-trainee ratio. The instructor must be dedicated to training delivery during all hours of training. A task competency list is on file.

Eight Technicians and Estimators will receive up to 24 hours of PL training. Newly-hired Technicians and Estimators will receive the most PL hours. An experienced trainer will explain the process and needed equipment and verify that the trainee understands standards and specifications. The trainer will observe the employee perform tasks, provide feedback, assist with re-work if necessary, and ensure that the task has been performed correctly and employee is proficient in the task.

PL allows the Company to fill the gap between classroom-based instruction and hands-on learning opportunities using real scenarios.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Care Skills
  - Customer Retention
  - Customer Engagement
  - Customer Relationship Building
- Advanced Sales & Marketing Skills
  - Prospecting & Closing
  - Sales Account Management
  - Advanced Closing Techniques
  - Sales Procedures & Strategies
- Negotiation Skills
- Conflict Resolution
- Communication Skills
- Presentation Skills

COMMERCIAL SKILLS

- I-CAR Collision Repair Certification Skills
- Refinishing Skills
  - Trim & Hardware
  - Surface Preparation
  - Vehicle Priming/Sealing
  - Paint Spray Guns Maintenance & Set-up
  - Corrosion Protection Process
  - Sand, Buff & Detail
  - Color Theory & Tints
  - Blending Techniques
  - New Technologies
- Structural Repair
  - Unibody Alignment
  - Three dimensional measuring
  - Repair & replacement of Outer Body Panels
  - High Strength Steels
  - Aluminum Repair Processes
  - MIG Welding Skills
  - Straightening Structural Damage
  - Glass Replacement
  - Pillars, rocker Panels, Rails, Front Structures & Floor Pan Replacement
  - Heating Cooling and AC Systems
  - Steering & Suspension Systems
  - Advanced Vehicle systems
- Non-Structural Vehicle Repair Skills
  - Remove & Install Trim & Hardware
  - Adhesive Bonding

    - Diagnose Wind Noise & Water Leaks
    - Aluminum Cosmetic Damage
    - Spot Welding
- Estimating Skills
    - Steering & Suspension System Damage Analysis
    - Damage on non-drivable vehicles
    - Electrical/Mechanical Systems
    - Stationary glass
    - Advanced Materials
    - Advanced Vehicle Systems
- Vehicle Operation, Maintenance, & Troubleshooting
- Alternative Fuel & Hybrid Vehicle Repair Diagnostics
- Service Procedures & Scheduling
- Product Knowledge
- OEM (Original Equipment Manufacturer) Knowledge/Skills
- Tesla, Honda, Toyota, Lexus and BMW certification training

COMPUTER SKILLS

- CCCOneSoftware
    - Job Costing
    - Production Flow
    - Production Planning - ETA Times & Dates
    - Internal & External Customer Communication
- Michell & Michell Repair Center Software
- CCC Info Systems Software
- Alldata Software
- Microsoft Office Suite (intermediate)
- Quickbooks accounting

CONTINUOUS IMPROVEMENT

- Leadership Skills
- Teambuilding
- Root Cause Analysis
- Kaizen Event Strategy & Implementation
- Lean Concepts
- Process/Quality Improvement
- Problem Solving/Decision Making Skills
- Inventory Control
- Standard Operating Procedures

HAZARDOUS MATERIALS

- Volatile Organic Compound (VOC) Tracking
- Emergency Clean-up
- Registration, Evaluation, Authorization & Restriction of Chemical Substances
- Completing Material Safety Data Sheets (MSDS)

Productive Lab Hours (1:1 Trainer to Trainee Ratio)
0-24

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Body filler methods
- Structural resistance spot welding
- Mig brazing techniques
- Disabling electric or hybrid vehicles
- Color Tinting
- Spraying/ blending techniques
- Measuring vehicle structures
- Alignment process for unitized Vehicles
- Alignment process for full frame vehicles
- Aluminum Repair
- Technical Estimating Skills
- Estimatics DRP (Direct Repair Program) Skills
- Estimating System Software Skills

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. Productive Lab is capped at 24 hours per-trainee.

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

The Coca-Cola Company

Agreement Number: ET17-0151

Approval Date: August 4, 2016

ETP Regional Office: North Hollywood **Analyst:** M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Green Technology Priority Industry: ☒ Yes ☐ No
Counties Served:	Alameda, Contra Costa, Fresno, Los Angeles, Mendocino, Monterey, Orange, Riverside, Sacramento, San Bernardino, San Diego, San Joaquin, Santa Clara, Shasta, Solano, Ventura, Yuba	Repeat Contractor:	☒ Yes ☐ No
Union(s):	☒ Yes ☐ No International Association of Machinists and Aerospace Workers, Local No. 1186, Teamsters Local No. 683		

Number of Employees in:	CA: 8,000	U.S.:72,000	Worldwide: 700,000
Turnover Rate:	14%		
Managers/Supervisors: (% of total trainees)	12%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	**Total ETP Funding**
$72,900		$2,970 30%	$0		$69,930

In-Kind Contribution:	100% of Total ETP Funding Required	$89,100

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Imp., HazMat, Mgmt. Skills, PL-Comm Skills	70	8-200	0	$900	$21.44
				Weighted Avg: 50			
2	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Imp., HazMat, Mgmt. Skills, PL-Comm Skills	11	8-200	0	$630*	$21.44
				Weighted Avg: 50			

*Reflects Substantial Contribution

Minimum Wage by County: $17.02 per hour for Alameda, Contra Costa, and Santa Clara counties; $16.51 per hour for Orange County; $16.48 per hour for Los Angeles County; $16.46 per hour for San Diego County; $16.10 per hour for Sacramento County, and $15.60 per hour for Fresno, Mendocino, Monterey, Riverside, San Bernardino, San Joaquin, Shasta, Solano, Ventura, and Yuba counties.

Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☐ Yes ☒ No ☐ Maybe

Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Fleet Mechanic/Fleet Mechanic Supervisor		81

INTRODUCTION

Founded in 1886, The Coca-Cola Company (Coca-Cola) (www.coca-cola.com) is a producer and distributor of nonalcoholic beverages. In addition to its traditional carbonated soft drinks, Coca-Cola's product line also includes juices, still and sparkling waters, isotonics, and teas. The Company qualifies for standard retraining under the out-of-state competition provisions as a manufacturer and is eligible for priority industry reimbursement.

Union Support

The workers targeted for this program are represented by two collective bargaining units: International Association of Machinists and Aerospace Workers, Local 1186 and Teamsters, Local 683. These unions have provided letters of support for the training of their respective members.

PROJECT DETAILS

This is Coca-Cola's fifth proposal in the last five years. The four previous proposals focused on training for the production side of the Company. Three of the four proposals were focused on training only at the Downey location. Training outlined in this proposal will target only Coca-Cola's Fleet Mechanics located statewide. These employees are responsible for the maintenance and repair of the Company's assorted fleet of vehicles and material handling equipment. Training will cover vehicle diagnostics, brake systems, parts management, cost estimating, order tracking, and shop equipment skills.

This training will help the Company implement process improvements for productivity, service quality, and overall efficiency. Training will take place at the following Coca-Cola locations: Benicia, City of Industry, Coachella, Downey, Fresno, Los Angeles, Marysville, Oceanside, Orange, Rancho Cucamonga, Redding, Sacramento, Salinas, San Diego, San Jose, San Leandro, San Ramon, Stockton, Sylmar, Torrance, Ukiah, Union City, and Ventura. Training will be delivered by a combination of in-house subject matter experts and outside training vendors to be identified during the contract term.

Training Plan

Business Skills (10%) – Training will be offered to all trainees. Training will focus on vehicle/equipment inventory control, communication skills, budgeting/cost control, and negotiation skills. Trainees will learn how to make better business decisions and manage resources with greater efficiency.

Commercial Skills (60%) – Training will be offered to all trainees. Training will cover fleet operations and material handling skills. Areas of emphasis will include air brake training, hydraulics, electrical systems, hybrid technology, and manufacture-specific equipment skills.

Computer Skills (10%) – Training will be offered to all trainees. Training will help workers become more proficient with business software solutions in the areas of resource planning, inventory control, budgeting, purchase order tracking, and shipping/distribution.

Continuous Improvement (10%) – Training will be offered to all trainees. Training will focus on process improvements and problem solving methodologies that enhance productivity through Lean principles, strategic planning, and Total Quality Management.

Hazardous Materials (5%) – Training will be offered to all trainees. Training will cover the proper handling of hazardous materials specific to automotive and machine shops.

Management Skills (5%) - Training will be offered to Fleet Mechanic Supervisors. Trainees will be equipped with project management, communication, motivation, and conflict management skills necessary to become more effective leaders.

Productive Laboratory

Productive Laboratory (PL) trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. According to company representatives, PL is the most effective way for Fleet Mechanics to hone the skills needed to maintain/repair Coca-Cola's assorted inventory of vehicles and machinery. PL will allow these workers to achieve the competencies needed to perform their jobs with the highest level of safety and efficiency.

The proposed PL training will involve the use of vehicle maintenance equipment such as engine diagnostics tools, alternative fuel technology, testing equipment, and automotive/machine shop tools. Training will be provided by subject matter experts (managers/supervisors and leads). Training staff will primarily consist of managers with several years of experience in fleet operations. The Fleet Mechanic supervisor trainees included in this proposal will be required to successfully complete all requisite course material prior to providing any subsequent instruction. The instructors will be dedicated to training delivery during all hours of training with a trainer-to-trainee ratio that will not exceed 1:1. Training will be capped at 40 hours per trainee.

Substantial Contribution

Coca-Cola is a repeat contractor with payment earned in excess of $250,000 and a former Substantial Contribution at the 15% level, at the Downey facility, within the past five years. Accordingly, reimbursement for trainees at this facility (Job Number 2) will be reduced by 30% to reflect the Company's $2,970 Substantial Contribution to the cost of training.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. The Company spends approximately $130,000 annually on fleet operations training in California. Training includes new-hire orientation training, original equipment manufacturer training, commercial driver's license requirements, and computer skills training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  Coca-Cola's Southern California Market Unit Fleet Manager and Area Supervisors will oversee project administration, tracking, and documentation. In addition, supervisors and leads at each participating location will be tasked with ensuring that training records adhere to ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by Coca-Cola under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0338	$360,880	02/01/2016–01/31/2018	415	0	0

This Agreement is being administered on the Company's production side of the house. Based on ETP Online Training Systems, there are 515 trainees enrolled with 1,763 reimbursable hours that have been delivered (approximately $22,214 or 6% of approved amount). Training is on-going with scheduled classes continuing through October 2017.

PRIOR PROJECTS

The following table summarizes performances by Coca-Cola under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
*ET14-0207	Downey, Los Angeles, San Leandro, Anaheim, Ontario, San Diego	10/28/2013–10/27/2015	$1,278,200	$525,247 (41%)
ET12-0163	Downey	11/28/2011–11/27/2013	$497,100	$352,509 (71%)
ET09-0543	Downey	06/09/2009–06/08/2011	$194,400	$146,289 (75%)

***ET14-0207**: This project included multiple Coca-Cola production plants. Low performance was due primarily to higher management changes at several participating locations which affected the scheduling of training.

The proposed training targets Coca-Cola's Fleet Mechanics only and will be handled by a completely different administrative team on the Fleet Operations side of the company. No additional occupations from current and/or prior agreements are included in this proposal. The Fleet Operations team has a systematic tracking system in place to ensure project success. The Market Unit Fleet Manager and four Area Supervisors will be in charge of overall planning, coordination, and administration. In addition, each training location will have a designated lead person responsible for scheduling and documentation. Lead personnel at each location will transmit training records to their respective Area Supervisors for centralized control. The Market Unit Fleet Manager and a Project Coordinator will then conduct monthly audits of the consolidated training files to gauge performance and maintain project assurance.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Product Knowledge
- Inventory Control
- Negotiation Skills
- Scheduling, Budgeting & Cost Control
- Communication Skills
- Decision Making Skills

COMMERCIAL SKILLS

- Project Management
- Time Management
- Air Brake Training
- A/C
- Hydraulic
- Fleet Operations
- Parts
- Equipment Operation
- Inventory Control
- PM Practices
- Electrical Systems
- Welding Skills
- Hybrid Technology
- Crown, Material Handling Training
- Eaton
- Liftgate Training, Waltco, Maxon, Leyman
- Opacity

COMPUTER SKILLS

- Advanced Software Systems
- Budgeting
- Manufacturing Resource Planning
- Shipping Solutions and Related Distribution Software
- Inventory Control
- Purchase Order Tracking

CONTINUOUS IMPROVEMENT

- Problem Solving
- Total Quality Management
- Decision Making
- Strategic Planning
- Project Management
- Monitoring
- Supply Chain Elements
- Lean Manufacturing
- 5S
- Six Sigma
- Troubleshooting

HAZARDOUS MATERIALS

- HHM (Household Hazardous Materials)
- Bloodborne Pathogens

MANAGEMENT SKILLS (For Managers/Supervisors only)

- Supervisor/Lead Role
- Coaching/Motivating
- Managing a High Performance Workplace
- Project Management
- Conflict Management
- Leadership
- Change Management
- Planning & Controlling
- Communication Skills

PL Hours

0 - 40

COMMERCIAL SKILLS (limited ratio 1:1)

- Diagnostic Operations/Practices/Techniques
- Forklift Equipment Maintenance Skills
- Maintenance on Hybrid
- Maintenance on CNG
- A/C Training
- Brake Training
- Welding Skills
- Shop Equipment Training
- Evaluation Techniques
- Quality Training
- ASE (Automotive Service Excellence)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 40 hours per trainee.

IAMAW DISTRICT LODGE 947

535 W. Willow St. • Long Beach, CA 90806 • (562) 427-8900 • Fax (562) 427-1122

April 29, 2016

Robert Holman
Coca-Cola Refreshments USA, Inc. – Rancho
10670 6th Street
Rancho Cucamonga, CA 91792

Dear Mr. Holman:

Machinists Union Local No. 1186 fully supports the Employment Training Program offered by Coca-Cola Refreshments USA, Inc. for its members at all facilities under the jurisdiction of Local 1186 employed by Coca-Cola Refreshments USA, Inc.

Sincerely,

James E. Watson
James E. Watson
Assistant Directing Business Representative
IAMAW District Lodge 947

JW/dp
Opeiu 537
Afl-cio

Website: www.iam947.org • Email: iam947@hotmail.com

AFFILIATED WITH
THE INTERNATIONAL BROTHERHOOD OF TEAMSTERS
Local Union No. 683

Salesdrivers, Helpers, and Dairy Employees

San Diego and Vicinity, California

Phone:(619) 232-7903 1333 E. Madison Ave., El Cajon, CA 92021 Fax: (629) 232-8077

STEVE V. LYONS
President

TODD C. MENDEZ
Secretary-Treasurer

April 27, 2016

Ron O'Bard
Labor Relations Consultant
Coca-Cola Refreshments
700 W. Grove Ave. Orange, CA 92865

Dear Ron:

Teamsters Local 683 fully supports the Employment Training Program Offered by Coca – Cola Refreshments USA, Inc. for its members at all the facilities under the jurisdiction of Local 683employed by Coca – Cola refreshments USA, Inc.

Sincerely,

T.C. Mendez

Todd Mendez
Secretary – Treasurer

DELEGATION ORDER

STATE OF CALIFORNIA
ETP
EMPLOYMENT TRAINING PANEL

Training Proposal for:

Weatherby, Inc.

Small Business

ET17-0135

Approval Date: August 8, 2016

ETP Regional Office: North Hollywood **Analyst:** E. Fuzesi

CONTRACTOR

- Type of Industry: Manufacturing
  Services
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 71
  Worldwide: 72
  Number to be trained: 71
  Owner ☒ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 1%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $25,844
- In-Kind Contribution: $55,613

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mgmnt. Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills	71	8-200	0	$364	*$15.60
				Weighted Avg: 14			

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

- Reimbursement Rate: $26 SB Priority
- County(ies): San Luis Obispo
- Occupations to be Trained: Administration/Support Staff, Production Staff, Technical Staff, Supervisor/Manager, Executive Staff, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: $3.24 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: IQMS in Paso Robles will provide Computer Skills training.
  MadLand Toyota in Santa Maria will provide Manufacturing Skills.
  Other trainers will be identified as they are retained.

OVERVIEW

Founded in 1945 and located in Paso Robles, Weatherby, Inc. (Weatherby) (www.weatherby.com) is a family-owned sporting firearm and ammunition manufacturer and distributer. Weatherby's customers include sporting goods stores, distributors, mass merchants, and conservation groups nationwide.

This will be Weatherby's second ETP Agreement in five years. The previous ETP Agreement focused on the implementation of a new ERP software by Epicor. However, as the project progressed, it was determined that Epicor's integrated web store was not scalable to hand-held devices and Epicor could not integrate the Company's credit card processing system.

Recent changes in the U.S. firearms industry include emerging low cost competitors manufacturing entry level bolt action rifles that are built on more economical designs and production methods. New gun owners are interested in target shooting and favor more tactical, self-defense orientated products. To respond to consumer demands, Weatherby's new selection of rifles has been designed to meet the range and durability requirements of this market.

To remain competitive, Weatherby is using a new finishing process (cerakote), new performance features, and advanced assembly processes. To meet changing industry and customer demands, Weatherby is also upgrading its existing software systems. EnterpriseIQ ERP & Manufacturing Execution System (IQMS) software solution is designed to solve manufacturing challenges, increase efficiency, eliminate unnecessary downtime, enhance manufacturing production, and improve supply chain visibility. To upgrade technical skills and align business and management practices with these changes, training in all aspects of operations is necessary.

Training Plan

All employees will receive class/lab and productive lab training in alignment with their roles and responsibilities.

Business Skills: Training will be offered to all occupations to market and launch new products while aligning sales, marketing, customer service, and financial controls to support upgrades and expansions.

Computer Skills: Training will be offered to all occupations. Training includes the new ERP system; software upgrades, operating systems, hardware, and servers. These technology advancements will enable the Company to manage all areas such as point-of-sale, supply chain management, production, and financial controls under one real-time platform, replacing manual processes. The new system will integrate information management across the entire organization to facilitate an immediate flow of information and report between all business functions.

Continuous Improvement: Training will be offered to all occupations to improve efficiencies and help all areas of operations. Training will help eliminate wasteful activities, reduce scrap and rework, improve problem-solving to maintain superior customer service.

Management Skills: Training will be offered to Supervisors/Managers to provide leadership skills, coaching skills and improve communication.

Manufacturing Skills: Training will be offered to Production and Technical Staff to integrate new products, processes and equipment operations to launch, support and maintain new customer and industry demands.

Certified Safety Training

OSHA 10/30: Training is a series of courses "bundled" by industry sector offered to all staff. It consists of 10 hours of classroom training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to manufacturing. Completion of the training results in a

certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Hazardous Materials (HAZMAT): Training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. It is a minimum of 24 hours with an 8-hour annual refresher, and will be delivered in a classroom setting. Supervisors/Managers, Production and Technical Staff will receive up to 24 hours of training. These positions may require the use of toxic and/or hazardous substances. These substances are used to coat metals and other components, and protect them from corrosion, and wear for the best performance. The Company's new machines and products will demand more environmentally friendly methods of managing hazardous materials.

Productive Laboratory: Productive Laboratory (PL) trainees may produce goods for profit as part of the training identified in the Curriculum. Weatherby requests PL training in Manufacturing Skills. PL training is necessary for trainees to gain practical experience in properly operating and troubleshooting new equipment, and making needed adjustments to processes. Certain functions, such as fabrication, inventory management and assembly, can only be performed in a live setting.

Approximately half of Manufacturing Skills training will be PL. This includes training for 30 Technical and Production Staff who will receive up to 24 PL hours with an average of 15 hours. Training will occur under the direct supervision of the trainer in a small group setting with instructional education followed by hands on demonstration and practical skills implementation in a productive setting.

Weatherby is requesting the trainer-to-trainee ratio of 1:3, as the PL trainees' job description and the new skillsets are similar, allowing up to three trainees from the same occupation group to attend the training sessions together. The PL trainers will be qualified and/or certified to deliver the course content and material. They will be responsible for directing the operations and instructions as well as providing immediate feedback to the trainee as work is performed. Since the trainer's time is dedicated to training/coaching/evaluation, there is a lower production output. This will allow trainees to acquire the skills to become competent in equipment operation and assembly without the pressure of normal operational requirements.

Modifications

Training Hours Limitation

Small business proposals are capped at 60 hours per trainee. Weatherby is requesting 200 hours due to the complexity of the new ERP Software. Extension of training hours will allow for extensive hands-on ERP Software training and live demos before the system goes live in January 2017. Pre-launch software training will facilitate a smoother introduction and implementation with highly knowledgeable staff managing the new software.

Contract term

Weatherby is requesting a two-year contract term to allow sufficient time for implementation of new products, completion of IQMS training and retention periods, enabling the Company to implement advancements and growth to remain competitive.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Weatherby under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned $ %
ET13-0195	Paso Robles	6/30/13-6/29/15	$90,272	$25,998 (29%)

This Agreement was largely based on training related to the implementation of the Epicor ERP software. As the contract term progressed, the programmers at Epicor discovered several roadblocks that prevented the installation of the software. Epicor was not able to produce a solution to meet the Company's need to process credit cards transactions through Paypal who was Epicor's only credit card vendor. These flaws severely degraded the utility of the software. Also, when Epicor was stalled and unable to perform, other training courses were postponed because they were tied into the implementation. The end result of problems with the ERP software was that training could not occur as planned, and performance was severely impacted.

Since then, Weatherby has acquired a new ERP software from IQMS that can integrate the Company's data and credit card processes effectively. Weatherby's ERP software has already been fully developed and will be installed end of July 2016. The Company's goal is to go-live company-wide in January 2017. Weatherby has hired a director to oversee ETP training. The proposed project has been right-sized in alignment with the Company's prior earnings.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Services
- New Product Development
- Performance Management
- Product Knowledge
- Sales and Marketing

COMPUTER SKILLS

- Hardware Upgrades for ERP
- Interface to ERP
- IQMS ERP
- New Servers
- Software Systems (Intermediate/Advanced)
    - Mas 200
    - Microsoft Office 2010
    - Windows 7
- SolidWorks CAD/CAM

CONTINUOUS IMPROVEMENT

- Frontline Decision Making and Problem Solving
- Process Improvements
- Quality Control

HAZARDOUS MATERIALS

- Hazardous Materials Handling

MANAGEMENT SKILLS

- Leadership Skills

MANUFACTURING SKILLS

- Assembly
- Ballastician Techniques
- Equipment Operation
- Gunsmith Techniques
- Production Techniques

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10 (Requires Completion of 10 hours)
- OSHA 30 (Requires Completion of 10 hours)

Productive Lab Hours

0-24

MANUFACTURING SKILLS (Ratio 1:3)

- Assembly
- Ballastician Techniques

- Equipment Operation
- Gunsmith Techniques
- Production Techniques

Note: Reimbursement for retraining is capped at 200 total hours per-trainee, regardless of method of delivery. PL is capped at 24 hours per-trainee.