

# PANEL PACKET

December 2018



Employment Training Panel



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# M e m o r a n d u m

To: Panel Members

Date December 7, 2018

From: Stewart Knox  
Executive Director

Subject: **Directions Meeting Sites**

The Employment Training Panel will meet on **Friday, December 7, 2018 at 9:30 a.m.**

**California Environmental Protection Agency (Cal/EPA)  
Sierra Hearing Room, 2nd Floor  
1001 I Street, Sacramento, CA 95814**

Telephone (916) 327-5640 (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 10<sup>th</sup> St.**
- Turn left on **10<sup>th</sup> Street**
- Turn left onto **“I” Street**
- **Parking available at the Cal/EPA building**  
(Corner of **10<sup>th</sup>** and **“I” St.**)

### **From San Francisco:**

- Take **80 East**
- Go towards **Capitol City Freeway** (not Reno)
- Take **I-5 North**
- Exit **“J” Street to 10<sup>th</sup> Street**
- Turn left on **10<sup>th</sup> Street**
- Turn left onto **“I” Street**
- **Parking available at the Cal/EPA building**  
(Corner of **10<sup>th</sup>** and **“I” St.**)



# M e m o r a n d u m

To: Panel Members

Date December 7, 2018

From: Stewart Knox  
Executive Director

Subject: **Future Meeting Sites**

<p><i>December 7, 2018</i></p>	<p><b>California Environmental Protection Agency (Cal/EPA)</b>  <b>Time: 09:30 AM</b>  <b>Sierra Hearing Room, 2nd Floor</b>  <b>1001 I Street, Sacramento, CA 95814</b></p>
<p><i>January 25, 2019</i></p>	<p><b>California Environmental Protection Agency (Cal/EPA)</b>  <b>Time: 09:30 AM</b>  <b>Coastal Hearing Room, 2nd Floor</b>  <b>1001 I Street, Sacramento, CA 95814</b></p>
<p><i>February 22, 2019</i></p>	<p><b>California Environmental Protection Agency (Cal/EPA)</b>  <b>Time: 09:30 AM</b>  <b>Coastal Hearing Room, 2nd Floor</b>  <b>1001 I Street, Sacramento, CA 95814</b></p>
<p><i>March 29, 2019</i></p>	<p><b>California Environmental Protection Agency (Cal/EPA)</b>  <b>Time: 09:30 AM</b>  <b>Coastal Hearing Room, 2nd Floor</b>  <b>1001 I Street, Sacramento, CA 95814</b></p>



## Employment Training Panel

**STATE OF CALIFORNIA  
EMPLOYMENT TRAINING PANEL**  
California Environmental Protection Agency  
1001 I Street  
Sierra Hearing Room, Second Floor  
Sacramento, CA 95814  
October 26, 2018  
(916) 327-5640

### **PANEL MEMBERS**

Barry Broad  
Chair

Janice Roberts  
Vice-Chair

Gloria Bell  
Member

Cheryl Akin  
*Ex-Officio* Member

Gretchen Newsom  
Member

Rick Smiles  
Member

Ernesto Morales  
Member

Ali Tweini  
Member

### **Executive Staff**

Stewart Knox  
Executive Director

Michael A. Cable  
Legal Counsel

**STATE OF CALIFORNIA**  
**EMPLOYMENT TRAINING PANEL**  
California Environmental Protection Agency  
1001 I Street, Sierra Hearing Room, Second Floor  
Sacramento, CA 95814  
October 26, 2018

**I. PUBLIC PANEL MEETING CALL TO ORDER**

Chairperson Barry Broad called the meeting to order at 9:30 a.m.

**II. ROLL CALL**

Present

Gloria Bell  
Barry Broad  
Janice Roberts  
Ali Tweini  
Rick Smiles  
Cheryl Akin  
Gretchen Newsom

Absent

Ernesto Morales

Executive Staff Present

Stewart Knox, Executive Director

Legal Counsel

Michael A. Cable

**III. AGENDA**

A brief overview of the Agenda was made, and it was questioned whether anyone has any changes to the Agenda. No changes were suggested or made.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion to approve the Agenda.

Motion carried, 7 - 0.

**IV. MINUTES**

It was questioned whether there were any changes and/or additions that need to be made to the Minutes from September 28, 2018. No changes were suggested or made.

ACTION: Ms. Roberts moved and Ms. Bell seconded the motion that the Panel approve the Minutes from the September 28, 2018 meeting.

Motion carried, 7 - 0.

## **V. REPORT OF THE EXECUTIVE DIRECTOR**

Mr. Knox reported that today's Panel Meeting concerns projects totaling just over \$13.0M, with approximately \$646K in Delegation Orders, for a grand total of just over \$13.0M, looking at possibly a larger meeting in December.

It was reported that the following people were in attendance to present Proposals: Anna Nastari, San Francisco Bay Area Regional Office Manager; Diana Torres, San Diego Regional Office Manager; and Jana Lazarewicz, Sacramento Regional Office Manager.

It was reported, regarding the Budget for Alternative and Renewable Fuel and Vehicle Technology Program (ARFVTP): that ETP is in partnership with the California Energy Commission in regards to \$2M approved through an Interagency Agreement; and that ETP's four (4) ARFVTP proposals in the last few months totaled over \$1M, leaving approximately \$2M remaining for ARFVTP proposals this year.

It was reported, regarding Core Funds for Fiscal Year (FY) 2018/19: today the Panel will consider another \$13M with an additional \$646K approved by delegation order; that upon the Panel approving the just over \$81M in projects for this year, ETP will have approximately \$21+M for the remainder of FY 2018/19.

It was reported, regarding Delegation Orders: that all such project proposals are capped at \$75K; that all such project proposals are to be approved by the Executive Director on a continuous flow basis; and that the 12 projects subject to Delegation Orders for today's Panel Meeting total just over \$646K.

It was reported, regarding 2018/19 total program funding to date: that approximately 580 projects have been submitted to the Panel, with a value of just over \$120M; and if all project proposals for today's Panel Meeting are funded today, that the Panel will have approved 251 projects, with a value of just over \$81M.

It was reported, regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at \$45M in demand, with \$13M in allocation; Multiple Employer Contract (MEC) requests are at \$8.6M in demand, with \$3.3M in allocation; Small Businesses requests are at \$9.5M in demand, with \$3.3M in allocation; Critical Proposals are at \$0 in demand, with \$764K in allocations; and Apprenticeship programs are at \$3.0M in demand, with \$383K in allocation. Overall demand is approximately \$65+M.

It was reported that the number of total projects in FY 2018/19 in the Regional Offices is 219; that the total number of projects currently in the Applications and Assessment Unit is 198; and that the number of total projects is 417.

It was reported that Staff is working hard to get the projects assigned out to the Regional Offices, and that to date about 80% of the projects have been assigned to the Regional Offices.

## VI. LEGISLATIVE UPDATE

A Legislative Update memorandum was provided to Panel Members. There was nothing new to report.

## VII. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

Mr. Broad asked whether there was any discussion needed in regards to a motion to adopt the consent calendar projects.

Chairperson Broad asked for a motion to adopt Consent Calendar Items #1 through #11.

Bay Area Video Coalition, Inc.....	\$196,006
California Natural Products.....	\$199,576
College of the Sequoias.....	\$109,746
El Classifico.....	\$187,200
Express Sewer & Drain, Inc.....	\$173,940
Giligia College ( <i>Amendment</i> ).....	\$ 45,524
Los Alamitos Medical Center, Inc.....	\$182,000
San Joaquin County Economic Development Association.....	\$195,247
SurveyMonkey, Inc.....	\$198,744
Tustin ABA Services for Kids, LLC.....	\$102,960
Vellutini Corporation dba Royal Electric Company.....	\$198,978

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion to approve the consent calendar for Items #1 through # 11.

Motion carried, 7 – 0.

## VIII. COMMITTEE REPORT TO PANEL

There was no Committee Meeting to report for the month of October 2018. The Committee will meet in December 2018, prior to the Panel Meeting.

## IX. REVIEW AND ACTION ON PROPOSALS

### Single Employers

#### **Tab #12 – AHMC Healthcare, Inc. dba Monterey Park Hospital**

Ms. Torres presented a proposal on behalf of AHMC Healthcare, Inc. dba Monterey Park Hospital (MPH), in the amount of \$348,000. Founded in 1972, MPH is a general medical/surgical hospital located in Monterey Park, CA. The hospital provides in/out patient care, sub-acute, and emergency medical services. This will be MPH's third ETP Agreement, the third in the last five years.

Healthcare has continued to advance in practice, provision of care, and technology. As a result, employees much remain current on medical care and skill set to sustain and provide high quality healthcare services. New regulation calls for medical providers to improve patient safety and utilize electronic medical recordkeeping systems for proper documentation. Training will improve employee knowledge and skills, as well as ensure compliance with the Joint Committee Accreditation Healthcare Organization.

Ms. Torres introduced Ruth Honig, Director of Clinical Process Improvement; Daniel Song, CFO; and Ericka Smith, COO.

Ms. Roberts congratulated MPH for having very good wages for CNAs, commented that the wage rates appear almost double of what Ms. Roberts has seen come before the Panel.

Mr. Tweini asked about the veterans.

Ms. Smith responded that they do have veterans working for them. They do not actively recruit just veterans, but they have many working for them.

**ACTION:** Ms. Roberts moved and Ms. Bell seconded the motion for approval of the proposal for AHMC Healthcare, Inc., dba Monterey Park Hospital in the amount of \$348,000.

Motion carried, 7 - 0.

### **Tab #13 – Consolidated Disposal Service, LLC dba Republic Services, Inc.**

Ms. Torres presented a proposal on behalf of Consolidated Disposal Service, LLC dba Republic Services, Inc. (Republic), in the amount of \$341,700. Founded in 1998 and headquartered in Phoenix, AZ, Republic provides solid waste collection recycling and disposal services. The Company serves customers across the US and Puerto Rico. Customers include residential and commercial clients including single and multi-family unit residences, small businesses, healthcare facilities, retail establishments and construction sites. The training outlined in this proposal will be provide to employees at 25 California locations across Los Angeles, Orange, San Bernardino, Imperial and San Diego counties.

Ms. Torres introduced Georgina Santelises, Human Resources Manager; Judith Kriegsman, President/CEO Judith's Training Services.

Ms. Roberts commented that it appeared the last Agreement wasn't very successful due to the HR manager leaving the company at a critical time during the last contract. Ms. Roberts wanted a further explanation as to why that last contract was not very successful.

Ms. Santelises responded that there was a reorganization of management; either because of turnover or because they were assigned to a different location. Ms. Santelises further commented that with the current proposed contract, they now have two people, herself and another person, in which all administrative duties will be funneled through in order for them to have better control and oversight over compliance and reporting to ETP.

Ms. Roberts is concerned that there are 25 locations in the current proposal. Ms. Roberts feels that 25 locations will require a lot of administrative duties, which may be difficult for two people to handle. Ms. Roberts would like them to succeed with this particular contract and advised them to utilize their consultant, as well as to reach out to ETP Staff, for assistance should they need it.

Mr. Tweini asked if they have any veterans improvement program and asked what they do to help the veterans.

Ms. Santelises responded that they do not have a specific program for veterans, but they do have a lot of veterans that work for the company. They attend job fairs to recruit veterans. Ms. Santelises further stated that corporate is in the process of developing a program specifically for veterans.

Ms. Newsom commented that she echoed the same concerns as the Vice Chair.

**ACTION:** Mr. Tweini moved and Ms. Newsom seconded the motion to approve the proposal for Consolidated Disposal Service, LLC dba Republic Services, Inc., in the amount of \$341,700.

Motion carried, 7 - 0.

#### **Tab #14 – Dexcom, Inc.**

Ms. Torres presented a proposal on behalf of Dexcom, Inc. (Dexcom), in the amount of \$427,648. Founded in 1999 and headquartered in San Diego, Dexcom provides diabetes care and management with its continuous glucose monitoring (CGM) technology to help patients and healthcare professionals better manage diabetes. Dexcom's CGM devices provide continuous insight into patients' glucose levels throughout the day. Unlike a blood glucose meter, which provides just a single glucose reading, CGM devices provide real-time dynamic glucose information every five minutes. The San Diego operations transfers, scales, and produces the latest technology with plans to maintain, grow and innovate within California as the adoption of CGM products continue to rise. Dexcom's customers include medical device distributors, hospitals, and doctors. Ultimately, Dexcom's CGM devices are used by patients to monitor and manage their diabetes.

Ms. Torres introduced Emer Higgins, Director of Manufacturing; Roya Howe, Senior Trainer; Jiwon Jeong, Director, Tax at Pricewaterhouse Coopers, LLP; Annie Rothschild, Senior Associate, Tax at Pricewaterhouse Coopers, LLC.

Ms. Newsom asked, since they were moving into a 7-day work schedule, whether the employees were going to get time off.

Ms. Higgins responded they are going to a 4/10 schedule in order for the employees to have a weekend day off.

Ms. Newsom asked if they were working more than 40 hours a week, and Ms. Higgins responded by stating they are currently working more like 60 hours a week.

Ms. Newsom commended and thanked them on their job creation component with hiring the 50 new employees without taking the wage deduction.

Ms. Higgins responded that on January 1, 2019, they are adding a blanket dollar to all employees in order to maintain the minimum wage. This will be exclusive of the March 1, 2019, annual increase.

Mr. Roberts thanked them on coming to ETP for their first contract, and wanted to confirm that PWC is not going to be doing any administration work for them.



Ms. Higgins confirmed that PWC will not be doing any administration work for them, and also stated that they have 20 trainers who will be doing the training for them. Ms. Higgins further confirmed that she worked at another company who had the same contract with ETP, so she is very familiar with the administration duties ETP requires.

**ACTION:** Mr. Tweini moved and Ms. Newsom seconded motion to approve the proposal for Dexcom, Inc., in the amount of \$427,648.

Motion carried, 7 - 0.

### **Tab #15 – Analog Devices, Inc.**

Ms. Nastari presented a proposal on behalf of Analog Devices, Inc. (Analog), in the amount of \$256,620. Established in 1965, Analog is a semiconductor manufacturer specializing in data conversion and signal processing technology. Clients are from a variety of industries including; cellular phone companies, computer manufacturers, automotive, consumer electronics, military and aerospace. Analog has two California locations. Training will occur at its Milpitas site. This is Analog's first ETP Agreement. Analog is eligible for ETP funding consideration at a Priority Industry reimbursement rate as a Manufacturer.

In 2018, Analog acquired Linear Technology and is in the process of merging the two companies. As a result, Analog requests ETP funds to assist with cross-training former Linear staff and the upgrade of staff's skills to help address company-wide consistency.

Ms. Nastari introduced Teresita Kuntz, Training/Lean Manufacturing Manager Government Programs.

Ms. Roberts confirmed with Ms. Nastari that Analog has not been before ETP prior to this meeting. Ms. Nastari responded that it was Linear who had the contract which is ending in October 2018.

**ACTION:** Ms. Roberts moved and Ms. Newsom seconded the motion for approval of the proposal for Analog Devices, Inc., in the amount of \$256,620.

Motion carried, 7 - 0.

### **Tab #16 – Applied Materials, Inc.**

Ms. Nastari presented a proposal on behalf of Applied Materials, Inc. (Applied), in the amount of \$894,920. This proposal for Applied Materials, Inc., is designated a Critical Proposal by GO-Biz based on the Company's planned expansion, clean energy investment, and commitment to adding new jobs in California. Founded in 1967 and headquartered in Santa Clara, Applied uses nano manufacturing equipment, machines, and tools to make input products for semiconductor wafers and chips, flat panel displays, high density batteries, solar photovoltaic cells and modules and other electronics. "Nano manufacturing" is the production of ultra-small structures that includes the engineering of thin films on substrates for use in a variety of electronic products. Customers include Intel, Samsung, Panasonic, and Yingli.

Ms. Nastari introduced Mike Hill, Senior Director of Talent of Organizational Development; Phillip Herrera, Herrera & Company.

Mr. Tweini commended them on the proposal and their comprehensive program for veterans.

Ms. Roberts stated that this was a great contract.

Cheryl Akin thanked Mr. Hill for the company's expansion and hiring in California.

Ms. Newsom commended the company for high wages.

**ACTION:** Ms. Roberts moved and Ms. Bell seconded the motion for approval of the proposal for Applied Materials, Inc., in the amount of \$894,920.

Motion carried, 7 - 0.

### **Tab #17 – Gallo Cattle Company, A Limited Partnership dba Joseph Gallo Farms**

Ms. Lazarewicz presented a proposal on behalf of Gallo Cattle Company, A Limited Partnership dba Joseph Gallo Farms (Gallo Cattle), in the amount of \$525,824. Founded in 1980 and located in Atwater, Gallo Cattle ([www.josephfarms.com](http://www.josephfarms.com)) is a natural cheese manufacturer. The Company has its own milking herd, and grows its own feed, giving it control over its product. Customers include grocery stores, food service distributors, large retail chains nationwide and Mexico. Training will take place at their Atwater location.

Ms. Lazarewicz introduced Jennifer Cargill, Vice President of Human Resources and Risk Management; Beth Ingle, BLI Co. (subcontractor).

Mr. Tweini asked if they have a veterans recruitment program.

Ms. Cargill said they do actively recruit and hire veterans. They also participate in a number of career fairs to hire veterans.

**ACTION:** Ms. Roberts moved and Ms. Bell seconded the motion for approval of the proposal for Gallo Cattle Company, A Limited Partnership dba Joseph Gallo Farms in the amount of 525,824.

Motion carried, 7 - 0.

### **Tab #18 – Ready Roast Nut Company, LLC**

Ms. Lazarewicz presented a proposal on behalf of Ready Roast Nut Company, LLC (Ready Roast) in the amount of \$245,000. Founded in 2006 and headquartered in Madera, Ready Roast specializes in manufacturing roasted tree nuts and peanuts. Products include whole and sliced dry roasted, oil roasted, and seasoned nuts. The company has a specialty line which includes flours, butters, and pastes. Ready Road provides products and services to manufacturing companies in the dairy, snack, food, bakery, and confectionery industries. Customers include Nestle, Mars, Starbucks, Trader Joes, Costco, and Dove Chocolates. Training will be provided at the two Madera locations and the Hughson location.

Ms. Lazarewicz introduced Marisa Hernandez, Human Resources Manager; Tashiana Jackson, Project Manager CTI.

Ms. Bell asked how they plan to hire the 100 new employees: where are they going to get them, and if they will be hired on a temporary or permanent basis.

Ms. Hernandez responded that they do both temp and permanent, it really depends on what the need is from their client, which varies from week to week. She also works with the Madera Workforce to hire veterans and people that have been out of work for six months or more.

Mr. Tweini commented that he was pleased with the hiring of veterans and to continue doing what they are doing.

Ms. Roberts asked if they do almond butter exclusively.

Ms. Hernandez responded that the company has its own product line, which is carried at Target and Amazon. They also do almond butter for Trader Joe's.

Ms. Roberts asked if they had anything under their own label. Ms. Hernandez stated that it's called Naturally More, which Amazon and Target now carry.

Ms. Newsom asked about the wage range that begin at \$12/hour up to \$90/hour. Ms. Newsom asked how many workers are at the low wage range, and how many workers are at the high wage range.

Ms. Hernandez responded that about half of their employees are at the low wage range, because they have a lot of general labor positions. For those employees who want to move up within the company, they have individuals come in and teach them about leadership and other things, so they can earn move into the higher wage range. They like to promote within the company first. For the temp employees their wage is minimum wage.

Ms. Bell asked if the temps become permanent do they receive the wage increase. Ms. Bell also inquired about when the workers receive benefits.

Ms. Hernandez responded that once they are put on permanent status, they automatically get bumped up on the wage scale. This usually takes about six months. Employees receive benefits after 30 days and 401K after 90 days.

**ACTION:** Mr. Smiles moved and Ms. Roberts seconded the motion for approval of The proposal for Ready Roast Nut Company, LLC in the amount of \$245,000.

Motion carried, 7 – 0.

### **Tab #19 – The Wine Group, Inc. (PULLED)**

### **Tab #20 – Walter Anderson Plumbing, Inc., dba Anderson Plumbing Heating & Air Conditioning, Inc.**

Ms. Lazarewicz presented a proposal on behalf of Walter Anderson Plumbing, Inc., dba Anderson Plumbing Heating & Air Conditioning, Inc. (Anderson PHA) in the amount of \$696,800. Founded in 1978 and headquartered in El Cajon, Anderson PHA installs, repairs and services HVAC systems and plumbing to residential homes in San Diego, Imperial,

Orange, and Riverside counties. This will be Anderson PHA's second ETP Agreement, its second in the last five years.

In its first project Anderson PHA focused on training its staff in Business Skills to facilitate improved communication, customer service and team work. It also focused on Communication Skills, Computer Skills and Commercial Skills. Moving forward, this new project will focus highly on commercial skills for staff including new technologies, new product lines and skills upgrades for lower skilled staff. Trainees will not receive duplicative training provided in the last ETP project.

Ms. Lazarewicz introduced Mary Jean Anderson, Owner/President; Jill Meeuwsen, Synergy Management Consultants (subcontractor).

Ms. Nickelson, one of Ms. Anderson's employees, spoke briefly about how the ETP funding for training has changed her life as well as her kids.

Ms. Roberts thanked Ms. Nickelson for sharing her story with the Panel and is glad that she came and spoke today.

Mr. Tweini thanked Ms. Anderson for all the company does for veterans as well as women in the trade. Mr. Tweini stated he represents skilled trade workers through the Cal State System and they are encouraging women to enter into these programs.

Ms. Newsom also thanked Ms. Nickelson for sharing her story. Additionally, Ms. Newsom stated a concern with Job #3, in which the veteran job creation and wages appear significantly lower than Job #1, and Ms. Newsom requested an explanation as to why this would be.

Ms. Meeuwsen responded by saying that these veterans will have no experience in the HVAC industry, and the company trains these employees from the ground up. Ms. Meeuwsen also stated that within 90 days, these employees will be in their own truck making over \$20/hour.

Ms. Bell wanted clarification, and asked specifically what the exact dollar amount is after the 90 days of training.

Ms. Anderson stated that it is \$22/hour, plus they receive SPIFFS for certain things they do.

Ms. Roberts asked about the amount they are requesting in this proposal, as compared to their previous contract, this proposal being almost double, which is in addition to their hiring new people.

Ms. Anderson responded by stating they pushed back growth because they do not have enough people. Ms. Anderson explained that the industry is in crisis, as they need people to work. As such, Ms. Anderson noted that they have started a new program which is not being done by any other competitor companies.

Ms. Meeuwsen stated that their first contract was right-sized, and that they significantly ran over the hours required in the contract.

Ms. Roberts is proposing a 10% reduction on this contract, to which Ms. Meeuwsen agreed to.

Ms. Newsom asked about the 15% turnover rate in the current proposal.

Ms. Meeuwsen stated that the 15% turnover rate is from the result of poaching.

Ms. Roberts reiterated her proposal of taking a 10% reduction with the caveat that if they do well, they can come back and request more funding.

Mr. Broad wanted to clarify that this was an actual motion from Ms. Roberts who indicated it was. Mr. Broad then asked for a second, which was provided and seconded by Ms. Bell

Ms. Newsom requested an amendment to the motion to approve this proposal with a reduction of 10%, by adding that the wage deduction for veterans be removed, but keeping the veteran reimbursement rate of \$26/hour.

Mr. Broad asked for clarification as to the post retention wage; specifically whether it would be \$17.03 for Job #3.

Ms. Newsom confirmed by stating that Job #3 would match Job #1 at \$17.03/hour.

Mr. Broad then restated the motion as amended; which is to approve the proposal, but with a reduction of the funding amount by 10%, and raising the post retention wage rate for veterans in Job #3 to \$17.03, keeping the veteran reimbursement rate of \$26/hour.

Amendment to the Motion was seconded by Ms. Roberts.

**ACTION:** Ms. Newsom moved and Mr. Tweini seconded an amended motion for approval of the proposal for Anderson PHA, with a reduction of the funding amount by 10%, making the new amount \$627,120; and raising the post retention wage rate for veterans in Job #3 to \$17.03, keeping the veteran reimbursement rate of \$26/hour.

Motion carried, 7 – 0.

## **Multiple Employer Contracts**

### **Tab #21 – Hospitality Industry Training and Education Fund dba Hospitality Training Academy**

Ms. Torres presented a proposal on behalf of Hospitality Industry Training and Education Fund dba Hospitality Training Academy (HTA) in the amount of \$97,973. Established in 2006, HTA is a 501(c)(3) non-profit institution and labor-management partnership/Taft-Hartley Fund that provides benefits to both contributing employers and members of the UNITE HERE Local 11 labor union.

HTA provides training for both new hires entering the hospitality sector and incumbent workers seeking promotions through improved job skills and work experience. HTA provides

classes for various hospitality and LAX airport positions, as well as ServSafe Food Handlers Certification and TIPS Alcohol Certification for incumbent workers.

Ms. Torres introduced Adine Forman, Executive Director; John Brauer, WED Executive Director.

Ms. Roberts commented she felt this should have been on the consent calendar.

There were no questions from the Panel.

**ACTION:** Ms. Roberts moved and Mr. Tweini seconded the motion for the approval of the proposal on behalf of Hospitality Industry Training and Education Fund dba Hospitality Training Academy in the amount of \$97,973.

Motion carried, 7 – 0.

### **Tab #22 – Managed Career Solutions, Spc.**

Ms. Torres presented a proposal on behalf of Managed Career Solutions, Spc. (MCS) in the amount of \$295,939. Founded in 1987, MCS provides workforce development services in Los Angeles County. These services include outreach, intake, case management, job training and job placement for adults and dislocated workers, with priority service to veterans. The company assists in providing trainees with skills to help maintain gainful employment based on their education, work history and interest.

MCS also partners with Workforce Innovation and Opportunity Act to help provide supportive services to veterans and underserved adults. MCS operates comprehensive one-stop employment centers, known as American Job Centers of California for the City and County of Los Angeles. These supportive services provide for child care, transportation, assistance, and additional costs necessary for training such as uniforms, supplies, and books.

Ms. Torres introduced Philip Starr, PsyD, Executive Director; Antony Jacobo, Career Coach/Job Developer – Veterans.

Mr. Broad asked whether trainees receive a guard card after training.

Mr. Jacobo stated yes they do, in addition to getting the 40 hours, CPR training – AED, firearms training, pepper spray training, baton, and executive fundamentals.

Mr. Broad asked if they were all armed.

Mr. Jacobo confirmed they were and they also receive SB 1626 so they can work on school campuses.

Ms. Roberts thanked them again for coming back.

**ACTION:** Ms. Roberts moved and Mr. Tweini seconded the motion for the approval of the proposal on behalf of Managed Career Solutions, Spc., in the amount of \$295,939

Motion carried, 7 – 0.

## **Tab #23 – NTMA Training Centers of Southern California**

Ms. Torres presented a proposal on behalf of NTMA Training Centers of Southern California (NTMA) in the amount of \$1,799,244. The Los Angeles Chapter of the National Tooling and Machining Association trains for the machining industry in Southern California. NTMA was founded in 1968 and is headquartered in Santa Fe Springs, with training campuses located in Santa Fe Springs and Ontario. This will be NTMA's 36<sup>th</sup> ETP Agreement, the fifth in the last years.

NTMA prepares students for lifelong careers in the machining, tooling, metal-working and manufacturing industries. NTMA serves small to medium-sized machine shop employers that design and manufacture special tools, machines, dies, jigs, fixtures, gauges and precision-machined parts. These companies need skilled workers to remain competitive with cutting edge industry demands and to prepare workers to progress toward a high performance due to ongoing advanced technological changes in the metal industry.

Ms. Torres introduced Norma Meza, Executive Director of Financial Aid and ETP Administration Office.

Mr. Tweini wanted to thank her for all the work they do for the veterans.

**ACTION:** Ms. Roberts moved and Mr. Smiles seconded the motion for the approval of the Proposal of NTMA Training Centers of Southern California in the amount of \$1,799,244.

Motion carried, 7 – 0.

## **Tab #24 – Saisoft Enterprises, Inc., dba Professional Career Development Center**

Ms. Torres presented a proposal on behalf of Saisoft Enterprises, Inc., dba Professional Career Development Center (PCDC) in the amount of \$200,152. Founded in 2005, PCDC was recently acquired by Saisoft Enterprises, Inc., in 2018. The new company PCDC is an approved school by the Bureau for Private Postsecondary Education that provides training programs in allied healthcare careers: Certified Nursing Assistant (CNA), Home Health Aide (HHA) and Nursing Informatics. PCDC has a placement rate of 97% for graduates in the CNA and HHA training programs.

Since 2003, Saisoft Enterprises, Inc., has provided ETP funded training as a training provider in over 15 ETP contracts. However, this will be PCDC's first ETP Agreement.

Ms. Torres introduced A.K. Thakore, President/Chief Executive Officer; Preeti Thakore, Admissions Director.

Ms. Roberts commented she appreciated them coming back.

Mr. Tweini asked about their work with veterans.

Mr. Thakore stated that one of their program directors is a former army medic and veteran himself. Through him, they are extending their outreach program to the community. To date, they have not recruited anyone, but will continue in their efforts to do so.

**ACTION:** Ms. Roberts moved and Ms. Newsom seconded the motion for the approval of the proposal of Saisoft Enterprises, Inc., dba Professional Career Development Center in the amount of \$200,152.

Motion carried, 7 – 0.

### **Tab #25 – United Association Local 250 Steamfitters**

Ms. Torres presented a proposal on behalf of United Association Local 250 Steamfitters (UA Steamfitters), in the amount of \$583,300. UA Steamfitters was created in 1945 by Local 250 and contractors in the industry. The UA Steamfitters is governed by a Board of Trustees and management members, and is a joint effort of the United Association Local 250 Steamfitters. The UA Steamfitters is located in Gardena and currently trains approximately 484 Apprentices and 3,000 Journeymen in Los Angeles area.

The UA Steamfitters provides training for Apprentices and Journeymen who primarily work in Oil refineries in Southern California. Major refineries include Chevron, USA El Segundo, Tesoro Refining & Marketing Company, PBF Energy Torrance, Phillips 66 Wilmington, Tesoro Refining & Marketing Company, Wilmington Refinery and Valerio Wilmington Asphalt Refinery.

Ms. Torres introduced Bill Wood, Training Director; Oscar Meier, Los Angeles Unified School District.

Ms. Newsom and Mr. Tweini asked that Mr. Wood speak about their veterans and piping program. It is one of the best.

Mr. Wood stated that they go through 18 weeks of training, which could take place anywhere, they learn how to weld. After this 18 week program they can be placed in any apprenticeship program in the nation. They get credit for 2 years and 270 hours.

**ACTION:** Ms. Roberts moved and Ms. Newsom seconded the motion for the approval of the proposal of United Association Local 250 Steamfitters in the amount of \$585,300.

Motion carried, 7 – 0.

### **Tab #26 – Murrieta Chamber of Commerce**

Ms. Torres presented a proposal on behalf of Murrieta Chamber of Commerce (Murrieta Chamber) in the amount of \$949,936. Founded in 1915 and located in Southwest Riverside County, the Murrieta Chamber is a nonprofit membership organization whose mission is to create and foster a sustainable business environment in the Murrieta area 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 City of Murrieta and with other Chambers in Southwest Riverside County that form the Southwest California Legislative Council.

Ms. Torres introduced Patrick Ellis, President/CEO; Deborah Almonte.



Mr. Tweini commented that they reach out to the veterans.

Mr. Ellis stated that they work closely with Veterans Business Action Committee (VBAC) to help recruit and train and get the veterans back out in the workforce.

**ACTION:** Mr. Smiles moved and Ms. Roberts seconded the motion for the approval of the proposal of Murrieta Chamber of Commerce in the amount of \$949,936.

Motion carried, 7 – 0.

### **Tab #27 – Orange County Electrical Joint Apprenticeship and Training Trust Fund**

Ms. Torres presented a proposal on behalf of Orange County Electrical Joint Apprenticeship and Training Trust Fund (OCETT) in the amount of \$940,064. Created in 1950 OCETT is administered jointly between the Orange County Chapter of the National Electrical Contractors Association (NECA) and the International Brotherhood of Electrical Workers (IBEW) Local 441. The trust is located in Santa Ana. Its mission is to provide up-to-date industry skills training and secure high-quality job opportunities for Journeymen and Apprentices and Pre-Apprentices in four electrical occupations.

Ms. Torres introduced David Lawhorn, Training Director; Jan Borunda, Cal Labor.

Mr. Tweini commended them on veterans post retention wages.

**ACTION:** Mr. Tweini moved and Ms. Newsom seconded the motion for the approval of the proposal of Orange County Electrical Joint Apprenticeship and Training Trust Fund in the amount of \$940,064.

Motion carried, 7 – 0.

### **Tab #28 – San Francisco Electrical Industry Apprenticeship and Training Trust**

Ms. Nastari presented a proposal on behalf of San Francisco Electrical Industry Apprenticeship and Training Trust (SF Electrical JATT) in the amount of \$949,980. Established in 1962, SF Electrical JATT 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 JATT serves approximately 410 Apprentices and 1,650 Journeymen. This is SF Electrical JATT's seventh ETP Agreement.

Ms. Nastari introduced Pete Chursin, Training Director; SFJATC; Jan Borunda, Cal Labor / ETP Coordinator.

There were no questions from the Panel.

**ACTION:** Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for San Francisco Electrical Industry Apprenticeship and Training Trust in the amount of \$949,980.

Motion carried, 7 - 0.

## **Tab #29 – Santa Clara County Electrical Joint Apprenticeship and Training Committee**

Ms. Nastari presented a proposal on behalf of Santa Clara County Electrical Joint Apprenticeship and Training Committee (Santa Clara JATC), in the amount of \$949,589. Santa Clara JATC was founded in 1958. The JATC is funded through collective bargaining between signatory employers of the National Electrical Contractors Association (NECA) and the International Brotherhood of Electrical Workers (IBEW) Local332.

Ms. Nastari introduced Robert Moreno, Training Director; SFJATC; Jan Borunda, Cal Labor / ETP Coordinator.

Ms. Newsom commented that there might be a need to include financial planning for apprentices.

Mr. Moreno agreed and indicated that it was started last year.

**ACTION:** Ms. Newsom moved and Mr. Tweini seconded the motion for approval of the proposal for Santa Clara County Electrical Joint Apprenticeship and Training Committee in the amount of \$949,589.

Motion carried, 7 - 0.

### **X. GENERAL PUBLIC COMMENT**

Steve Duscha commented about his belief that there are significant inconsistencies between the way union and non-union building trades are treated. Mr. Duscha believes non-union applicants are being treated differently to the detriment of the union applicants. Mr. Duscha said he understands that these issues will be brought before the Panel Committee, and that he endorses such a process and looks forward to discussing these issues at that time.

### **XII. MEETING ADJOURNMENT**

Meeting adjourned at 11:15 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 \$900,000.

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 \$950,00/\$1.8M\*

\*MECs over \$950,000 need to wait 18 months from start of contract term before applying for a new contract.

### *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 \$75,000 or less, and (2) single proposals for \$75,000 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.



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Airco Mechanical, Inc.**

**Agreement Number: ET19-0342**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** D. Jordan

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative SET	Industry Sector(s):	Construction (C)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento, San Francisco	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No U.A. Local Union 447		
Number of Employees in:	CA: 171	U.S.: 171	Worldwide: 171
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$322,100

<b>Total ETP Funding</b>
\$180,128

**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, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, OSHA 10/30, PL-Comm'l. Skills	146	8-200	0-14	\$1,118	\$22.77
				Weighted Avg: 43			
2	Retrainee Job Creation Priority Rate SET	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., HazMat, OSHA 10/30, PL-Comm'l. Skills	13	8-200	0-14	\$1,300	\$16.80
				Weighted Avg: 50			

**Minimum Wage by County:** Job Number 1 (SET/Priority Industry): \$22.77 per hour  
 Job Number 2 (SET/Job Creation): \$16.80 per hour in Sacramento County and \$18.22 per hour in San Francisco 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 \$1.77 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
<b>Job Number 1</b>		
Administrative Staff		8
Estimators		6
Field Crew		120
Purchasing Staff		4
Project Manager		8
<b>Job Number 2</b>		
Administrative Staff		1
Estimators		1
Field Crew		10
Project Manager		1

## **OVERVIEW**

Founded in 1974 and headquartered in Sacramento, Airco Mechanical, Inc. (Airco) ([www.aircomech.com](http://www.aircomech.com)) designs and installs state-of-the-art mechanical systems in commercial buildings. Airco specializes in heating, ventilation and air conditioning systems, plumbing systems, process piping and environmental control systems. Customers include general contractors, hospitals, commercial offices and utility plants. Training will take place at Airco's locations in Sacramento and San Francisco. This is Airco's first ETP proposal.

### **Veterans Program**

Airco does not actively recruit Veterans.

### **Union Support**

Trainees are represented by U.A. Local Union 447. A letter of support has been submitted.

## **PROJECT DETAILS**

### **Need For Training**

The Company invested in a new ERP system (Vista). This system is important for the Company to be efficient, timely and have accurate data on all projects. Airco must hire and train staff on modules such as Human Resources, Inventory, Project Management, Accounts Receivable/Billing and Lien Tracker.

Airco will also deliver training to its staff on Process Improvement. Field Crew will receive training on different techniques to install pipe and ducts. Additionally, Airco will deliver training to Estimators, Field Crew and Project Mangers on equipment and products they are not familiar with. Field Crew and Project Managers will be repairing mechanical systems that they did not install so they will need extensive training.

### **Retrainee – Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

With an increase in customer demand, the Company expects to grow over next few years and will hire 13 trainees (Job Number 2) to expand business capacity. Airco continues to face high demand for its products and services, and lacks sufficient staff to timely process client orders. Newly hired staff will receive certification training on High Heat Training, Global Harmonized System Training, Rigging and Signaling and Scissor Lift/Boom Training. The date-of-hire for 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 be delivered via Class/Lab, Videoconference, Computer-Based Training and E-Learning in the following:

**Business Skills:** Training will be delivered to all occupations and focus on Customer Service, Marketing/Sales Techniques, Retaining Customers and Cost Control. Staff will also receive training on Accounts Receivable/Billing module to bill clients directly and increase efficiencies.



**Computer Skills:** Training will be delivered to all occupations and focus on keeping staff is up-to-date on all ERP modules. Training includes Building Information Modeling Software, Intermediate/Advanced Microsoft Office, Preconstruction Module, Inventory Module and Spreadsheet Server.

**Commercial Skills:** Training will be delivered to all occupations and focus Product Knowledge, Piping Systems and Construction site preparations. Topics includes Control Panels, Scissor Lifts, Rigging and Signaling, Global Harmonized Systems and Equipment Operation.

**Continuous Improvement:** Training will be delivered to all occupations on Operational Processes, Team Building/Leading and Problem Solving. Topics include Kaizen, Process Capability, Quality Measurement Systems and Production Operations/Workflow.

**OSHA 10/30:** Training will be delivered to Field Crew and Project Managers. 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.

**Hazardous Materials:** Training will be delivered to Field Crew and Project Managers. Training will allow staff to operate in an appropriate manner when handling hazardous materials and conditions. Topics include Hazardous Material Handling/Cleaning and Disposal of Hazardous Materials and Asbestos.

### **Productive Laboratory**

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

Training will be delivered to the Field Crew. Trainer will demonstrate step-by-step instructions and then observe trainees perform these tasks. Training will be provided on Equipment Operation, Control Panels, Boom Lift, A/C Systems, Ducting Overview and Install, Piping Systems and Mechanical Systems. Training will provide staff with the tools they need to complete their job duties and repairs on products they did not install. Trainees will learn to operate new equipment. Trainees will also be knowledgeable in many skill sets that will assist them at the different job sites. Production will be impacted because an experienced staff member will be used to train and observe trainees.

Airco's equipment is complex, has a lot of components and varies with the different types of buildings. Staff is required to read very technical engineering plans on where to install heating and air conditioning equipment. If plans are read incorrectly it will be very costly. Also, staff needs to connect equipment to electrical panels which can be dangerous if not done correctly. Because of the equipment complexities, and machinery requires two workers to operate, Airco is requesting a 1:2 trainer-to-trainee ratio.

### **Computer-Based Training**

All trainees will receive approximately 14 hours of Computer-Based Training to support Class/Lab. Courses include OSHA 10, Hand and Power Tool Safety and Electricity Overview.

### **Special Employment Training**

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. SET trainees must be earning at least the statewide

average hourly wage of \$30.36 at the end of the retention period. For trainees employed in a priority industry, the Panel may modify the wage up to 25% below the statewide average hourly wage to \$22.77. Airco requests this modification.

### **Frontline Manager**

Airco will train frontline Managers and Supervisors. These employees communicate and interact with customers and members, and are available to provide services at all time. These individuals spend 100% of their time performing frontline work and 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 SET funding.

### **Commitment to Training**

Airco's annual training budget is approximately \$200,000 for safety, foreman training and employee improvement. The Company is committed to making sure all staff is up-to-date with the new safety plan and be able to efficiently use operate the new equipment and software. 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

Airco has a structured training plan in place. The CFO, Safety Manager and Accounting Manager will oversee the ETP project. Sierra Consulting Services will assist with administrative duties. Training will be delivered by in-house experts and vendors as needed.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

Sierra Consulting Services in El Dorado Hills assisted with development for a flat fee of \$19,000.

### **ADMINISTRATIVE SERVICES**

Sierra Consulting Services 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/Videoconference**

8 - 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Communication
- Business Fundamentals
- Business Writing
- Behavior Style Strategies
- Conflict Resolution
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Communication styles
- Cost Control
- Dealing with Difficult People
- Develop Employee Accountability
- Employee Engagement
- Essential Skills for New Supervisor
- Financial Analysis
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques & Strategy
- Negotiating
- Operational skills
- Organizational Structure Development
- Planning and Organization
- Retaining Customers
- Relationship Building
- Strategic Planning
- Time Management

**COMMERCIAL SKILLS**

- A/C Systems
- Boom Lift
- Building Systems
- Confined Space Entry
- Construction: Job Site Preparation
- Construction: Job Site Sequencing
- Construction: Methodologies
- Control Panels
- Defensive/Distracted Driver Training
- Ducting Overview & Install
- Environment Impact Planning
- Electricity Overview
- Engineering Theory/Planning/Design
- Equipment Operation
- Fall Prevention

- Forklift
- Global Harmonized System
- High Heat Training
- HVAC Systems
- Infection Control and Aseptic Practices
- Lock Out/Tag Out
- Mechanical Systems
- NFPA 70E Arc Flash Safety
- Piping Systems
- Personal Protective Equipment
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Rigging and Signaling
- Scissor Lift
- Work Order Processing

### **COMPUTER SKILLS**

- Autodesk/AutoCAD
- Building Information Modeling Software
- Customer Relationship Management Software
- Crystal Reports
- Intermediate/Advanced Microsoft Office
- Inventory Module
- Preconstruction Module
- Rivet
- Spreadsheet Server (Financial Management System)
- Vista by Viewpoint (ERP)

### **CONTINUOUS IMPROVEMENT**

- Cross-Training
- Communication Skills
- Creating a Quality Organization
- Change Management
- Decision Making
- How to Mentor
- Kaizen
- Leadership
- Meeting Management
- Process Improvement
- Production Scheduling
- Production Operations/Workflow
- Project Management
- Problem Solving and Decision Making
- Process Capability
- Quality Measurement Systems
- Root Cause Analysis
- Statistical Process Control
- Team Building

- Teamwork Development Skills
- Time Management

### **HAZARDOUS MATERIALS**

- Asbestos
- Disposal of Hazardous Materials
- Blood Borne Pathogen
- Hazardous Materials Handling
- Hazardous Chemical Cleaning/Handling
- Hazardous Waste Cleaning

### **OSHA 10/30** (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

Safety Training is capped at 10% of a trainee's total training hours.  
(This cap does not apply to Hazmat, OSHA 10/30 or HAZWOPER)

### **Productive Lab Hours**

0 – 24

#### **COMMERCIAL SKILLS** (RATIO 1:2)

- A/C Systems
- Boom Lift
- Building Systems
- Construction: Job Site Preparation
- Control Panels
- Ducting Overview & Install
- Equipment Operation
- Forklift
- HVAC Systems
- Mechanical Systems
- Piping Systems
- Scissor Lift

### **CBT Hours**

0– 14

#### **COMMERCIAL SKILLS**

- Electricity Overview - 2 hours
- OSHA 10
  - Intro to OSHA - 2 hours
  - Focus Four Hazards - 5 hours
  - Personal Protective and Lifesaving Equipment - 30 min
  - Health Hazards in Construction - 30 min
  - Cranes, Derricks, Hoists, Elevators, & Conveyors - 30 min
  - Excavations - 30 min
  - Materials Handling, Storage, Use and Disposal - 30 min
  - Scaffolds - 30 min
  - Stairways and Ladders - 30 min
  - Tools – Hand and Power - 30 min

- Back Safety Basics - 30 min
- Hand and Power Tool Safety - 1 hour

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

## **U. A. Local Union 447**

5841 Newman Court  
Sacramento, CA 95819  
Tel (916) 457-6595  
Fax (916) 454-6151



**Richard D. Bertacchi**

*President*

**Aaron T. Stockwell**

*Financial Secretary &  
Business Manager*

October 8, 2018

To Whom It May Concern,

Airco Mechanical, Inc. is signatory to Local Union 447 supplying workforce and serving the Plumbing and Piping industry. Local 447 Journeymen have access to continuing education and training through the Union in effort to elevate their skills.

The purpose of this letter is to provide authorization and permission to Airco Mechanical to provide a structured training program for the employees that are members of this Union to further increase their core foundational skills that are not offered at our JATC program.

Thank you for considering Airco Mechanical, Inc.'s application for approval by the Employment Training Panel.

Sincerely,

A handwritten signature in black ink, appearing to read 'Aaron Stockwell', written over a horizontal line.

Aaron Stockwell

Business Manager UA 447



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Anlin Industries**

**Agreement Number: ET19-0323**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate HUA	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno, Orange	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 334	U.S.:340	Worldwide: 340
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	4%		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$292,536

<b>Total ETP Funding</b>
\$199,680



**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 HUA	Business Skills, Computer Skills, Continuous Impr, Mfg Skills, PL- Mfg Skills, OSHA 10/30	324	8-200	0	\$520	*\$12.53
				Weighted Avg: 20			
2	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr, Mfg Skills, PL- Mfg Skills, OSHA 10/30	3	8-200	0	\$520	\$17.50
				Weighted Avg: 20			
3	Retrainee Job Creation Priority Rate HUA	Business Skills, Computer Skills, Continuous Impr, Mfg Skills, PL- Mfg Skills, OSHA 10/30	20	8-200	0	\$1,482	*\$11.00
				Weighted Avg: 57			

\*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 Number 1: \$12.53 per hour for Fresno County; Job Number 2: \$17.50 per hour for Orange County; Job Number 3: \$11.00 per hour for Fresno 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  
 Job Number 1: Up to \$1.53 per hour may be used to meet the Post-Retention Wage.  
 Job Number 2: Up to \$2.50 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1:</b>		
Administrative Staff		14
Customer Service Staff		21
Drivers		9
Engineering Staff		4
Information Technology Staff		4
Installers		17
Loaders		25
Maintenance Staff		10
Production Staff		191

Sales and Marketing		8
Service Technicians		6
Supervisors		15
<b>Job Number 2:</b>		
Service Technicians		3
<b>Job Number 3:</b>		
Administrative Staff		2
Customer Service Staff		2
Service Technicians		2
Production Staff		14

## **INTRODUCTION**

Founded in 1990 and headquartered in Clovis, Anlin Industries (Anlin) ([www.anlin.com](http://www.anlin.com)) manufactures windows and doors, specializing in custom windows (e.g. custom shapes, patterns, color, and glazing). Products include vinyl windows, sliding patio doors, and swinging French doors. Customers include contractors, homeowners, construction companies, and home improvement companies. Training will be provided for employees of the Company's Clovis and Anaheim locations. This will be the Company's first ETP Agreement.

### **Veterans**

Veterans are an important part of Anlin's team and are represented throughout the Company, from production staff to executive management. Anlin recruits by participating in job fairs that focus on pairing Veterans with local employers.

## **PROJECT DETAILS**

Anlin's revenue increased 4% in 2017 and the Company anticipates increased sales/production from \$65M to \$100M over the next five years due to increased current and incoming contracts. The Company will be expanding into additional locations in the Western States. Thus, the Company needs to improve efficiency and processes through LEAN manufacturing training. Additionally, to improve manufacturing capacity, the Company recently purchased equipment, such as LiSEC Glass Line and Vertical Hand Assist Glazers, and an ERP system, Frontier. Training will increase staff skill level, improve product quality, and reduce waste. The Company also plans to cross-train Production Staff and Engineering Staff to allow uninterrupted production.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

As its markets and customer demands increase, Anlin will be expanding business capacity by adding a third window line and a fourth glass line and purchasing new equipment. The Company will hire 20 new employees, Production Staff, Administrative Staff, Service Technicians, and Customer Service Staff (Job Number 3). The date-of-hire for 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 be delivered via Classroom/Laboratory, E-Learning and Productive Lab. In-house subject-matter experts and vendors, if necessary, will deliver training in the following:

**Business Skills:** Training will be offered to all occupations. Training will provide the skills to effectively and efficiently maintain business operations. Training topics include Customer Service and Product Knowledge.

**Computer Skills:** Training will be offered to all occupations. Training will improve software skills. Training topics include SolidWorks and Frontier.

**Continuous Improvement:** Training will be offered to all occupations. Training will focus on eliminating waste and improving processes. Training topics include Problem Solving, Leadership, and Supply Chain Optimization.

**Manufacturing Skills:** Training will be offered to Engineering Staff, Installers, Loaders, Maintenance Staff, Production Staff, and Service Technicians. Training, including cross-training, will increase equipment skills and improve production. Training topics include Blueprint Reading, Maintenance, and Production Skills.

## Certified Safety Training

1. 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 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.

## Productive Laboratory (PL)

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

PL training will be offered to Drivers, Engineering Staff, Installers, Loaders, Maintenance Staff, Production Staff, and Service Technicians. PL will build upon training delivered in the classroom with hands-on experience of production processes and equipment. To be deemed competent, trainees will be subject to periodic observations and measurable skill assessments. PL will ensure that trainees meets the Company’s core competencies. PL training will occur at job sites and the Company’s facilities.

All training will be delivered by an experienced in-house trainer. Due to the complexity and precision needed to complete tasks and the fact that some processes will require employees work in teams of three, Anlin is requesting a 1:3 trainer-to-trainee ratio. Trainees will receive approximately 80 hours of PL training.

## High Unemployment Area

Trainees in Job Numbers 1 and 3 work in Fresno County, a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%.

### ➤ 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. Anlin is requesting a wage modification

from \$16.70 per hour to \$12.53 per hour (Job Number 1) and \$13.66 per hour to \$11.00 per hour (Job Number 3).

### **Commitment to Training**

The Company's current annual training budget is approximately \$75,000 for the two California facilities that includes new hire orientation and safety 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

Anlin's management team, including top level executives, are committed to the success of the ETP-funded training. The Company has designated the Senior Accountant at the Anaheim location to oversee training. A Service Technician at each location will assist with administration and manage training. Anlin also retained a subcontractor with extensive ETP experience to assist with administration.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

California Manufacturing Technology Consulting in Torrance assisted with development for a flat fee of \$15,000.

### **ADMINISTRATIVE SERVICES**

California Manufacturing Technology Consulting 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/E-Learning Hours**

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Customer Service
- Finance & Accounting
- Product Knowledge
- Project Management
- Sales and Marketing

**COMPUTER SKILLS**

- Business Integrated Reporting Tools (BIRT)
- CAD/CAM
- Coding
- E-log
- Frontier
- iOS
- Microsoft Office (Intermediate and Advanced)
- SolidWorks

**CONTINUOUS IMPROVEMENT**

- Cell phone/ Tablet
- Communication Skills
- Leadership
- LEAN
- Problem Solving
- Production and Inventory Management
- Quality Inspection
- Quality Management Systems
- Six Sigma
- Supply Chain Optimization
- Team Building

**MANUFACTURING SKILLS**

- Blueprint Reading
- Computer Numerical Control (CNC) Programming
- Equipment Operations
- Geometric Dimensioning & Tolerancing
- Packaging & Shipping
- Maintenance
- Production Skills
- Safety
- Shop Math

**OSHA 10/30 (Certified OSHA Instructor)**

- OSHA 10
- OSHA 30

**Productive Lab Hours**

0-80 Trainees may receive any of the following:

**MANUFACTURING SKILLS** (1:3 trainer-to-trainee ratio)

- Boom Lift
- Circular Saws
- Computer Numeric Control (CNC) Machinery
- Forklift
- Installation
- Glass Cutters
- Glazing
- LiSEC Glass Processing Machine
- Loading/Unloading
- Packaging
- Painting
- Picker
- Punches
- Repairs
- Scissor Lift
- V-Groove
- Vinyl Heater and Molding Operations
- Vinyl Welder Operations
- Window Assembly

Safety Training cannot exceed 10% of total training hours per-trainee (This cap does not apply to OSHA 10/30)

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:**

**Arrow Drillers, Inc. dba Arrow Construction**

**Agreement Number: ET19-0349**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** D. Jordan

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative SET	Industry Sector(s):	Construction (C)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 140	U.S.:150	Worldwide: 150
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$311,000

<b>Total ETP Funding</b>
\$179,920

**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 Impr, Hazmat, Hazwoper, OSHA10/30, PL-Comm Skills	140	8-200	0-4	\$1,092	\$22.77
				Weighted Avg: 42			
2	Retrainee Job Creation Initiative Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Hazmat, Hazwoper, OSHA10/30, PL-Comm Skills	20	8-200	0-4	\$1.352	\$14.00
				Weighted Avg: 52			

**Minimum Wage by County:** Job Number 1: \$22.77 per hour statewide; Job Number 2: \$14.00 per hour in Sacramento 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 \$2.50 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
<b>Job Number 1</b>		
Administrative Staff		15
Estimators		3
Field Supervisors		12
Field Technicians		99
Project Managers		11
<b>Job Number 2</b>		
Administrative Staff		1
Estimators		1
Field Supervisors		2
Field Technicians		14
Project Managers		2



## **OVERVIEW**

Founded in 1995 and headquartered in Sacramento, Arrow Drillers, Inc. dba Arrow Construction (Arrow Construction) ([www.arrowcon.com](http://www.arrowcon.com)) specializes in underground utility systems construction including horizontal directional drilling, underground utilities, potholing services, patch paving, concrete and video inspection, and drainage systems recording. Customers include utility companies, municipalities and contractors. Training will only be delivered at Arrow Construction's location in Sacramento. This is Arrow Construction's first ETP proposal.

### **Veterans Program**

Arrow Construction does not actively recruit Veterans.

## **PROJECT DETAILS**

Underground construction industry workers deal with many obstacles. For Arrow Construction, safety is paramount. Training is focused on safety, starting with Gold Shovel Standard certification. The Gold Shovel Standard is a series of training to prevent life-threatening damages, empower workers to operate safely, and provide skills to protect workers and the public. Membership in the certification requires the Company to keep up with updates. Additionally, the Company will be implementing its own safety plan that will enhance current safety measures. Courses include Electrical Strike Safety, Compliance with Underground Service Alert requirements and Equipment Processes. Significant training is needed due to dangerous work environments. Hence, the Company requests to increase the safety training cap to 30%.

Arrow Construction will also provide training for new automated equipment and software, including Electromagnetic Utility Locating (EUL), Ground Penetrating Radar (GPR), Field Scout, HeavyJob, Equipment 360 and Asphalt Grinder and Paver. Training will allow employees to work efficiently on jobs.

### **Retrainee – Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

Arrow Construction has experienced an approximately 30% increase in business within the last year. Additionally, the Company has expanded business capacity with the purchase of new equipment. Arrow Construction will hire 20 trainees that include Administrative Staff, Estimators, Field Supervisors, Field Technicians and Project Managers (Job Number 2). Newly hired staff will need extensive training on new safety requirements and equipment.

The date-of-hire for 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 be delivered via Class/Lab, Videoconference, Computer-Based Training and E-Learning by in-house subject-matter experts and vendors, if needed, in the following:

**Business Skills:** Training will be delivered to all occupations. Training will focus on Business Communication, Financial Analysis, Product Knowledge, and Negotiating. Training will allow staff to effectively communicate with clients.

**Computer Skills:** Training will be delivered to all occupations. Training will focus on new automated equipment and software. Training topics include Electromagnetic Utility Locating, Group Penetrating Radar, HeavyJob, and Equipment 360. Training will improve efficiencies by allowing staff to communicate on job sites to make sure reports are not misread.

**Commercial Skills:** Training will be delivered to all occupations. Training will focus on compliance with customer safety programs, confined space work requirements, and proper equipment rigging. Training topics includes Paving, Directional Drilling, Asphalt Grinding and Excavating.

**Continuous Improvement:** Training will be delivered to all occupations on Production Scheduling, Team Building, Communication Skills, Cross Training and Process Improvement. Training will allow staff to stay up to date with changes to efficiently complete job duties.

**Hazardous Materials:** Training will be delivered to Project Managers, Field Supervisors and Field Technicians. Training will allow staff to handle hazardous materials and conditions. Topics include Hazardous Material Handling/Cleaning and Disposal of Hazardous Materials.

### **Certified Safety Training**

1. OSHA 10/30. Training will be delivered to Project Managers, Field Supervisors and Field Technicians. 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.
2. 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 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 unless they work full time onsite at the clean-up location.

### **Computer Based Training (CBT)**

CBT will support Class/Lab training. All trainees in Job Numbers 1 and 2 will receive no more than 4 hours of training in Directional Drilling.

### **Productive Laboratory (PL)**

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.

Training in Commercial Skills will be delivered to all Field Supervisors and Field Technicians. Trainees will learn to operate new equipment and navigate software systems including Asphalt Grinding, Excavating, Paving, Trenching and Equipment Maintenance and Repair. Trainees will work with a trainer who will demonstrate step-by-step instructions. Afterwards, the trainer will observe trainees performing the tasks. Most tasks are completed individually; however, some equipment will require groups of three. Production will be negatively impacted during training as

trainees are learning. Arrow Construction will provide approximately 60 PL training hours at a 1:3 trainer-to-trainee ratio.

### **Frontline Manager**

Arrow Construction will train frontline Managers and Supervisors. These employees communicate and interact with customers and members and are available to provide services at all times. These individuals spend 100% of their time performing frontline work and 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 SET funding.

### **Commitment to Training**

Arrow Construction's annual training budget is approximately \$250,000 for safety training, foreman training and employee improvement. 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

Arrow Construction has a structured training plan in place. The Controllers will oversee project administration. The Office Manager and an Administrative Staff member will assist. The Company also retained Sierra Consulting Services to assist with administrative duties.

### **Special Employment Training**

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

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

Arrow Construction retained Sierra Consulting Services in El Dorado Hills to develop this proposal for a flat fee of \$19,000.

### **ADMINISTRATIVE SERVICES**

Arrow Construction also retained Sierra Consulting Services to assist with administrative services for a fee not to exceed 13% of payment earned.

### **TRAINING VENDORS**

To Be Determined

**Exhibit B: Menu Curriculum****Class/Lab, E-Learning and Videoconference Hours**

8 – 200      Trainees may receive any of the following:

**BUSINESS SKILLS**

- Administration
- Business Communication
- Business Fundamentals
- Conflict Resolution
- Customer Relationship Management
- Customer Service
- Communication Styles
- Cost Control
- Decision Making
- Develop Employee Accountability
- Effective Meetings for Leaders
- Employee Coaching
- Essential Skills for New Leaders
- Financial Analysis
- Finance for Technical Staff
- Leadership
- Marketing/Sales Techniques & Strategy
- Negotiating
- Operational Skills
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Property and Resource Management Skills
- Relationship Building
- Strategic Planning
- Teambuilding
- Time Management

**COMMERCIAL SKILLS**

- Asphalt Grinding
- Change Order Management
- Compliance with Customer Safety Programs
- Compliance with Underground Service Alert (USA) Requirements
- Confined Space Work Requirements
- Directional Drilling
- Electrical Strike Safety
- Estimating
- Excavating
- Forklift
- How to Deal with Public Relations
- Obtaining and Processing Permits
- Offsite Spoils Disposal

- Onsite Spoils Management
- Paving
- Production Reporting
- Project Documentation
- Proper Rigging of Equipment
- Purchasing Procedures
- Resource Scheduling
- Safe Excavations Techniques
- Safe Potholing Operations
- Safe Traffic Control and Flagging Operations
- Trenching
- USA Ticket Management
- Work Orders
- Equipment Maintenance/Repair
- Work Order Processing

### **COMPUTER SKILLS**

- Autodesk/AutoCAD
- Crystal Reports
- Financial Management System (Vista by Viewpoint)
- Electromagnetic Utility Locating
- Equipment 360 HCSS
- Group Penetrating Radar
- Heavy Job HCSS
- Dispatcher by HCSS
- Heavy Bid HCSS
- Telematics (GPS)
- SQL Server (Management Studio)
- BIM
- Docuware
- Safety by HCSS

### **CONTINUOUS IMPROVEMENT**

- Cross Training
- Communication Skills
- Creating a Quality Organization
- Change Management
- Leadership
- Production Scheduling
- Production Operations/Workflow
- Process Improvement
- Project Management
- Quality Measurement Systems
- Root Cause Analysis
- Team Building
- Time Management

### **HAZARDOUS MATERIALS**

- Asbestos Removal
- Disposal of Hazardous Materials

- Hazardous Materials Handling
- Hazardous Chemical Cleaning/Handling

**HAZWOPER**

- HAZWOPER 40

**OSHA 10/30 (Certified OSHA Instructor)**

- OSHA 10
- OSHA 30

**CBT Hours**

0 – 4

**COMMERCIAL SKILLS**

- Directional Drilling 4 hrs

**Productive Lab Hours**

0 – 60

**COMMERCIAL SKILLS (1:3 trainer-to-trainee ratio)**

- Asphalt Grinding
- Directional Drilling
- Excavating
- Forklift
- Paving
- Proper Rigging of Equipment
- Safe Excavations Techniques
- Safe Potholing Operations
- Safe Traffic Control and Flagging Operations
- Trenching
- Equipment Maintenance/Repair

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:**

**Assessment, Consultation & Treatment Inc.**

**Contract Number: ET19-0357**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Niquet

**PROJECT PROFILE**

Contract Attributes:	Priority Rate SET SB <100	Industry Sector(s):	Services (G) Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 90	U.S.:90	Worldwide: 90
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$156,839

<b>Total ETP Funding</b>
\$102,180

**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, Continuous Impr	90	8-200	0	\$988	\$22.77
				Weighted Avg: 38			
2	Retrainee Job Creation Initiative SB <100 Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	10	8-200	0	\$1,326	*\$14.62
				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.

**Minimum Wage by County:** Job Number 1 (SET Priority): \$22.77 per hour statewide; Job Number 2 (SET Job Creation): \$14.62 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 \$2.50 per hour for Job Number 1 and up to \$0.62 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
Administrative Staff		5
Case Managers/Counselors		35
Therapists		40
Supervisors/Managers		10
<b>Job 2</b>		
Administrative Staff		1
Case Managers/Counselors		6
Therapists		3

**INTRODUCTION**

Founded in 2011 and headquartered in Pasadena, Assessment Consultation & Treatment Inc. (ACT), ([www.actpsychology.com](http://www.actpsychology.com)) consists of groups of professionals (Psychologists, Board Certified Behavior Analysts, Speech Language Pathologists, and Occupational Therapists) who offer outpatient services, such as psychological evaluations and Psychotherapy, to individuals



with autism, developmental disabilities, related language delays and behavioral challenges. ACT services the San Gabriel Valley and surrounding areas.

## **PROJECT DETAILS**

The field of diagnosing and treating mental and physical disabilities is rapidly growing and changing. In the last two years, ACT's workforce grew by 56. The Company will be hiring 10 additional employees within the term of Contract. With the high amount of newly hired employees, the Company must train these staff on regulations and processes to maintain a high-performance workplace, promote advanced job skills, and improve the client care experience. Training will allow new staff to integrate their skills with processes already in place.

Additionally, the field experiences on-going changes and improvements in treatment. One area with significant changes is Applied Behavior Analysis (ABA) practices. ABA now requires new processes for data collection and report writing. Staff must be trained to quickly identify and respond to changes relating to on-going assessments, data collection, treatment notes, report writing, scheduling and billing.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly hired employees will be subject to a lower post-retention wage.

ACT is expanding business capacity by hiring new employees. The Company is expanding service to adjacent areas throughout the San Gabriel Valley. With the expansion, the Company will hire six Case Managers/Counselors, three Therapists, and an Administration Worker (Job Number 2). The date-of-hire for 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 be delivered via Classroom/Laboratory and Video Conference methods. In-house subject-matter experts and vendors may be utilized to deliver training in the following:

**Business Skills:** This training will be offered to all occupations. Training will provide staff with tools to improve communication skills and customer relations.

**Commercial Skills:** This training will be offered to Case Managers/Counselors, Therapists and Supervisors/Managers. Training will help employees stay current with privacy guidelines, industry specific principles, and teaching strategies.

**Computer Skills:** This training will be offered to all occupations. Trainees will improve and maintain productivity with database systems.

**Continuous Improvement:** This training will be offered to all occupations. Training will help employees provide the highest standard of service to families and funding sources, while completing work in a timely manner and incorporating new technology and workplace procedures.

### **Commitment to 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. ACT invested \$95,000 annually in training. ETP funding allows the Company to enhance their training program.

➤ **Training Infrastructure**

ACT has a detailed training plan in-place and is ready to begin training upon approval. The CFO and the President of the Company will oversee administration. An administrative support staffer will also assist. Additionally, the Company has engaged the services of a third-party subcontractor with extensive ETP knowledge to assist with administration. In-house subject-matter experts and vendors may be utilized to deliver training.

### **DEVELOPMENT SERVICES**

Assessment, Consultation & Treatment, Inc. retained Training Funding Source in Seal Beach to assist with development of this proposal for a flat fee of \$4,900.

### **ADMINISTRATIVE SERVICES**

Assessment, Consultation & Treatment, Inc. also retained Training Funding Source in Seal Beach 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 and Video Conference Hours**

8-200 Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Communications
- Customer Relations

#### **COMMERCIAL SKILLS**

- Autism Spectrum Disorders
- Assessment
- Behavior Management
- Case Management
- Crisis Intervention
- Client Education
- Community Resources
- Counseling Skills
- Cultural Awareness
- Data Collection
- Documentation
- Evidence Based Treatment Strategies
- Insurance Reporting
- Family Effects and Intervention
- Parent Consultation
- Positive Behavior Supports
- Privacy Guidelines
- Psychopharmacology
- Therapist Skills

#### **COMPUTER SKILLS**

- Electronic Medical Records (EMR) Applications
- MS Office Suite (Word, Excel, PowerPoint)
- Medical Billing

#### **CONTINUOUS IMPROVEMENT**

- Problem Solving
- Quality Improvement
- Team Building

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



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**California Imaging Institute, LLC**

**Agreement Number: ET19-0324**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	Job Creation Initiative Retrainee Priority Rate SET HUA	Industry Sector(s):	Services (G) Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 210	U.S.: 212	Worldwide: 212
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	2%		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$265,000

<b>Total ETP Funding</b>
\$198,120

**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 HUA Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat.	140	8-200	0	\$1,014	*\$12.53
				Weighted Avg: 39			
2	Job Creation HUA Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat.	36	8-200	0	\$1,560	*\$11.00
				Weighted Avg: 60			

\*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 Number 1: \$12.53 per hour for Fresno County. Job Number 2: \$11.00 per hour for Fresno 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

\$0.53 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
<b>Job 1:</b>		
Billing Staff		16
Clerical Staff		26
Leads/ Supervisors		6
Medical Specialists		6
Patient Account Representatives		4
Radiology Technicians		70
Registered Nursing Staff		12
<b>Job 2:</b>		
Billing Staff		3
Clerical Staff		20
Leads/ Supervisors		2
Medical Specialists		1
Patient Account Representatives		1

Radiology Technicians		7
Registered Nursing Staff		2

## **INTRODUCTION**

Founded in 1992 and located in Fresno, Imaging Institute, LLC (CII) ([www.caimaginginstitute.com](http://www.caimaginginstitute.com)) offers medical services to customers throughout the Central Valley. Medical services include a full range of diagnostic exams including X-rays, Fluoroscopy, Nuclear Medicine (NM), PET CT, Ultrasounds, CT, MRI, Diagnostic Angiography, Kyphoplasty, Uterine Fibroids, Varicose Vein Therapy, Vertebroplasty, Mammography, and DEXA Bone Densitometry.

CII will serve as the lead employer with a closely related affiliate, Radiology Billing Services, RBS Inc. Training under this proposal will include four locations in Fresno County.

This will be CII's first ETP Agreement.

### **Veterans Program**

Though this project does not include a Veterans component, CII is in the process of creating a program to recruit Veterans

## **PROJECT DETAILS**

To remain competitive, CII must ensure accuracy, accessibility, timeliness, and extensive knowledge of each exam and service the Company offers. This requires a high level of training for all employees. CII requires medical staff to be continuously trained and cross trained on the equipment, customer service, and general and unique readings of test results. One type of training CII consistently performs with its staff is at-the-moment training. This type of training is usually done with the patient present and includes a unique test result or finding. The medical staff is able to talk with the patient and discuss the findings and unique items to look for in subsequent patients.

In September of this year, CII adopted an electronic health records system, EPIC. Training on the system is ongoing and will continue through the first quarter of 2019. The Company also purchased Optum software and GE Group Management software to be implemented in spring of 2019 and December 2019, respectively.

In addition to the new software and new equipment such as the Patient Monitoring Machine, staff will receive training based on their job description needs and cross training. The training ensures trainees have the skill set, knowledge and experience necessary to meet the changing needs of patient care in the medical field.

### **SET/HUA**

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.

Trainees (Job Numbers 1 & 2) work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's locations in Fresno County are in a HUA.

### ➤ Wage Modification

The Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. CII is requesting a wage modification from \$16.70 per hour to \$12.53 per hour for Job Number 1, and \$13.66 per hour to \$11.00 per hour for Job Number 2, to serve workers in lower-wage occupations.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

The Company will hire 36 new employees (Job Number 2). The date-of-hire for 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.

CII saw a 6.5% increase in revenue this past year and is projecting a 5% increase in revenue in the next two years. To meet the growing customer needs, the Company is expanding services, adding new equipment to its current locations and its newest location in Clovis.

### **Training Plan**

Training will be delivered via Classroom/Laboratory and E-Learning methods. In-house subject matter experts and vendors may be utilized to deliver training in the following:

**Business Skills:** Training will be offered to all occupations. Training will provide the skills to effectively and efficiently maintain business operations. Training topics include Customer Service and Scheduling.

**Commercial Skills:** Training will be offered to Billing Staff, Clerical Staff, Radiology Technicians, Registered Nursing Staff, and Medical Specialists. Training focuses on proper handling of product, compliancy, and adhering to the Company’s operating procedures. Training topics include Lunar DEXA Equipment, Mammography, and X-Ray Equipment.

**Computer Skills:** Training will be offered to all occupations. Training will improve software skills. Training topics include EPIC, RadPayer, and Optum.

**Continuous Improvement:** Training will be offered to all occupations. Training will focus on eliminating waste and improving Company processes. Training topics include 5S, Critical Thinking, and Quality Improvement.

**Hazardous Materials:** Training will be offered to all occupations. Training will focus on handling hazardous materials. Training topics include HAZCOM and Nuclear Medicine.

### **Commitment to Training**

The Company’s annual training budget is approximately \$265,000 for training that includes updated processes, continuing employee development, and 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

Training will be provided by qualified in-house trainers. CII has designated the ETP Coordinator and one additional staff member at each location to oversee the ETP project. The

Company's senior management team is in full support of training and the success of the ETP project.

**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/E-Learning**

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Billing and Coding
- Customer Service
- Health Skills
- Insurance Eligibility
- Medical Education
- Product Knowledge
- Scheduling
- Team Building

**COMMERCIAL SKILLS**

- Computed Tomography (CT) Equipment
- Lunar DEXA Equipment
- Magnetic Resonance Imaging (MRI) Equipment
- Mammography
- Nuclear Medicine Equipment
- OEC C-Arm
- Patient Monitoring Machine
- Positron Emission Tomography (PET) Equipment
- Ultrasound Equipment
- Vascular and Interventional Radiology
- X-Ray Equipment

**COMPUTER SKILLS**

- Epic
- Epic Care Link
- GE Group Management
- Imagine Software
- Macro/Mipps
- Microsoft Office (Intermediate and Advanced)
- Optum
- RadPayer

**CONTINUOUS IMPROVEMENT**

- 5S
- Best Practices
- Communication
- Crisis Prevention & Intervention
- Critical Thinking
- Documentation
- Job Instructions
- LEAN Concept
- Patient Care
- Process Improvement

- Quality Improvement
- Standard Operating Procedures
- Train the Trainer
- Up and Out of the Box
- Value Stream

**HAZARDOUS MATERIALS**

- HAZCOM
- Nuclear Medicine

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



**Training Proposal for:**  
**California Tooling and Machining Apprenticeship Association**  
**Agreement Number: ET19-0933**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Jones

**PROJECT PROFILE**

Contract Attributes:	Retrainee Apprenticeship Priority Rate Veterans	Industry Sector(s):	Manufacturing (E) Services (61,71,72,81,92)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Northern and Central California	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Machinist Automotive Trades Lodge No. 190		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$113,652		\$7,872 8%		\$121,524

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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**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 Apprentice	Mfg. Skills, Computer Skills, OSHA 10/30	38	8-210	0	\$2,964	\$16.70
				Weighted Avg: 132			
2	Retrainee Veteran Apprentice	Mfg. Skills, Computer Skills, OSHA 10/30	3	8-210	0	\$2,964	\$16.70
				Weighted Avg: 132			

**Minimum Wage by County:** Job Numbers 1 & 2: \$18.22 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo and Santa Clara Counties; \$16.80 per hour for Sacramento County; and \$16.70 per hour for remaining Northern and Central California 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 \$2.22 per hour may be used to meet the Post-Retention Wage.

**Wage Range by Occupation**

Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Apprentice CNC Machinist Technician		1
Apprentice CNC Machinist		19
Apprentice Machinist		3
Apprentice Maintenance Machinist		1
Apprentice Mold Maker		9
Apprentice Tool & Die Maker		5
<b>Job Number 2</b>		
Veteran Apprentice CNC Machinist		1
Veteran Apprentice Mold Maker		1
Veteran Apprentice Tool & Die Maker		1

**INTRODUCTION**

The California Tooling and Machining Apprenticeship Association (CTMAA) ([www.calmachinist.com](http://www.calmachinist.com)) was founded in 1993. In 2008, CTMAA formed as a stand-alone trade association, doing business in California as a non-profit corporation headquartered in Petaluma. The Company's primary function is to train the next generation of machinists in California. This is CTMAA's third ETP Contract, the third in the last five years.

CTMAA offers multiple four-year apprenticeship programs for five occupations: Machinist, CNC Machinist, Mold Maker, Tool and Die Maker, and Maintenance Machinist. Additionally, CTMAA

offers a two-year apprenticeship program for the occupation of CNC Machine Technician. Apprentices from all six occupations will be trained under this proposal.

CTMAA operates as a Unilateral Apprenticeship Committee (UAC) for its member employers and a Joint Apprenticeship Training Committee (JATC) for machinist trades organized under Machinist Automotive Trades Lodge No. 190. CTMAA is recognized as a “non-traditional” apprenticeship and approved by the California Division of Apprenticeship Standards (DAS).

### **Veterans Program**

CTMAA actively recruits and has a hiring preference for Veterans. The Veteran training curriculum will be the same as Apprentice training outlined above. CTMAA is part of the National Helmets to Hard Hats initiative. All Veterans referrals from National Helmets to Hard Hats are automatically moved to the top of their Qualified Applicants list.

## **PROJECT DETAILS**

CTMAA recruits women Apprentices through recruiting campaigns and summer camps. Of the 110 students who attended the last six summer camps, 41 were women. Machine Working has traditionally been a male dominated industry; however, through outreach, CMTAA has been able increase diversity within the Machine Working industry.

CTMAA estimates that 40% of current Journeyman Machinists will retire in the next five years, creating strong demand for training the next generation of machinists. CTMAA will continue to provide Apprentices with valuable skills to ensure trainees can fill the gap left by retiring Journeymen.

### **Apprenticeship Program**

The Panel funds 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 supplements 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 two years for CNC Machinist Technicians and four years for CNC Machinist, Machinist, Maintenance Machinist, Mold Maker and Tool and Die Maker.

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 \$26 to \$21 per class/lab hour. Under the Apprenticeship Program, the post-retention wage has been standardized to reflect the Special Employment Training (SET) wage for Priority Industry of \$22.77. However, this model does not apply to Apprentices in a non-traditional program. In this instance, where all employers are in the manufacturing industry, the ETP Standard Minimum Wage requirement will apply, given the industry sector faces steep out-of-state competition. The value of employer-paid health benefits may be used to meet this post-retention wage for some trainees. Given that CTMAA operates as a UAC the wages and benefits will vary by employer.

## ➤ Hybrid Program

Apprentice programs are typically sponsored by a JATC or UAC. A JATC is created through collective bargaining, with an equal number of members appointed by union and management, as compared to a UAC which is created through a trade association. ETP recognizes both types of programs so long as they are approved by DAS. CTMAA was approved as a “hybrid” program with both a UAC and a JATC component by the DAS.

For the UAC program, the employers are members of the Association, and are obligated to pay the cost of RSI through their regular dues. For the JATC program, the employers are signatories to a Collective Bargaining Agreement, under which they are obligated to pay RSI through a training trust for represented employees. These employers are members of the Association.

Depending on the type of trade, apprenticeship programs vary in length, typically from 2-6 years. They also vary in size, ranging from less than 10 to several hundred Apprentices at any given point in time. In this proposal, five of the occupational titles are registered in a four-year program, and one is registered in a two-year program. Although first-year Apprentices are usually not eligible due to their higher drop-out rates, they may be included on a case-by-case basis when the program is two years or less in length. Here, they are included for CNC Machine Technician.

## Training Plan

**Computer Skills:** Training will be delivered to all occupations and focus on software programs to produce metal works. Training topics will include Autodesk Inventor, Computer-Aided Design, Computer Aided Machining, HAAS CNC Programs, Programming and Operation and MasterCam.

**Manufacturing Skills:** Training will be delivered to all occupations and follow the DAS approved curriculum. Trainees will receive a Certificate of Apprenticeship upon completion of the program. Courses include Process Control and Documentation, Pumps, Reaming, Rigging, Rotating Equipment, Safety Training, Secondary Operations and Shop Maintenance.

## Certified Safety Training

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 toward 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.

## Commitment to 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

The Apprentice Coordinator will oversee all project administration. The Apprentice Coordinator and an Administrative Assistant will coordinate training and review training rosters to ensure ETP compliance. Sierra Consulting Services will provide administrative services including the enrollment of trainees and tracking training hours into the ETP online systems. The Apprentice

Coordinator will report project performance to the Chairman of the Recruitment Committee on a bi-monthly basis. The Chairman will oversee project administration.

### **Training Coordinator and Trainer Qualification**

RSI will primarily be delivered on-campus at the Petaluma Adult School and Santa Rosa Community College. Instruction may also take place at Chabot College, De Anza College, Laney College, San Joaquin Delta College, Diablo Valley College, and College of Marin. Instructors are Journeymen and industry experts.

### **Impact/Outcome**

Successful completion of the apprenticeship program will result in Journeyman status, as certified by DAS. These trainees will also receive National Institute of Metalworking Skills credentials and a Certification for OSHA 10/30 safety training.

### **Marketing and Support Costs**

CTMAA requests 8% in support costs. The Association engages in outreach and positive recruitment activities with a special focus on increasing the participation in the apprenticeship program. Enrollment is anticipated to double as CTMAA expands from 10 Northern California Counties to 46 Northern and Central California Counties.

CTMAA conducts individual employer assessments to evaluate their machinist training needs and review their on-the-job training facilities. As a result, CTMAA updates the RSI Curriculum on a regular basis, through DAS. In addition, the Association regularly evaluates the performance of each registered apprentice. Staff recommends support costs of 8% for these purposes.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **ACTIVE PROJECTS**

The following table summarizes CTMAA's performance under an active ETP Contract:

Contract No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0920	\$86,086	12/19/16 – 12/19/18	43	0	0

Based on ETP Systems, 5,524 reimbursable hours have currently been tracked for potential earnings of \$71,812 (83% of approved amount). However, the Contractor projects final earnings of 100% based on training hours not yet uploaded.

### **PRIOR PROJECTS**

The following table summarizes Contractor's performance by CTMAA under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0902	Northern and Central California	8/3/15 – 8/2/17	\$80,080	\$74,170 (93%)

**DEVELOPMENT SERVICES**

Sierra Consulting Services in Cameron Park assisted with development for a flat fee of \$2,600.

**ADMINISTRATIVE SERVICES**

Sierra Consulting Services 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 Hours**

8-210

Trainees may receive any of the following:

**MANUFACTURING SKILLS**

- Assembly
- Bearings
- Bench Work
- Blue Print Reading
- Calibration
- Coating
- Composites
- Construction of Molds
- Construction of Tools and Dies
- Coolant Changes
- Coordinate Measuring Machine
- Deburring
- Drilling
- Electrical Discharge Machining
- Electrical Equipment
- Engineering Drawings for Machinist and Industrial Technicians
- Estimating
- Fabrication
- Finishing
- Fit-Up
- Job Planning and Preparation
- Gaskets
- Gearboxes
- Geometric Dimensioning and Tolerancing Interpretation & Application
- Grinding
- Heat Treating
- Hand Tools
- Hydraulics
- Inspections
- Jig Borer
- Lathes
- Lubrication
- Machine Cleaning
- Machine Tool Technology 1
- Machine Tool Technology 2
- Maintenance, Cleaning and Repair
- Manufacturing Materials and Processes
- Material Identification
- Material Testing
- Measurements and Calculations
- Mechanical Seals
- Metallurgy
- Milling

- Packing
- Pipefitting
- Pneumatics
- Powers Sources
- Power Tools
- Power Transmission Systems
- Precision Inspection
- Preventative Maintenance
- Process Control and Documentation
- Pumps
- Reaming
- Rigging
- Rotating Equipment
- Safety Training
- Secondary Operations
- Shop Maintenance
- Sketching
- Special Projects/NIMS
- Surface Treatment
- Tapping
- Tool Control/Selection/Application
- Tool Crib
- Tooling
- Turning (Manual and CNC)
- Vibration Analysis
- Vision Inspection Equipment
- Welding
- Writing Inspection Reports

#### **COMPUTER SKILLS**

- Autodesk Inventor
- Computer-Aided Design
- Computer-Aided Machining
- CNC Programming and Operation
- HAAS CNC Programs
- MasterCam

#### **OSHA 10/30** (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

Safety Training cannot exceed 10% of total training hours per-trainee.  
(This cap does not apply to OSHA 10/30)

Note: Reimbursement for retraining is capped at 210 total training hours per trainee, regardless of the method of delivery.



**Training Proposal for:**  
**CHA Hollywood Medical Center, L.P. dba**  
**Hollywood Presbyterian Medical Center**  
**Agreement Number: ET19-0337**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Paccarelli

**PROJECT PROFILE**

Contract Attributes:	SET Retrainee Priority Rate Medical Skills Training	Industry Sector(s):	Services (G) Healthcare (62)
			Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No SEIU 121RN Nurse Alliance; SEIU-UHW United Healthcare Workers West		
Number of Employees in:	CA: 1,000	U.S.: 1,000	Worldwide: 6,500
<u>Turnover Rate:</u>	14%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
<b>\$291,840</b>

<b>Total ETP Funding</b>
<b>\$199,680</b>

**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	Continuous Impr., Computer Skills, MST Didactic, MST Preceptor	320	8-200	0	\$624	\$22.77
				Weighted Avg: 24			

**Minimum Wage by County:** SET/Priority Industry: \$22.77 per hour Statewide  
**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 \$2.50 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Registered Nurse (RN)		170
Licensed Vocational Nurse (LVN)		40
Certified Nurse Assistant (CNA)		10
Therapist		22
Technician		28
Administrative Staff		50

**INTRODUCTION**

Founded in 1924, CHA Hollywood Medical Center, L.P. dba Hollywood Presbyterian Medical Center (HPMC) ([www.hollywoodpresbyterian.com](http://www.hollywoodpresbyterian.com)) is a 434-bed acute care hospital that provides medical services such as emergency care, orthopedic surgery, cancer care, highly-specialized fetal surgery, and comprehensive cardiac care to the residents of Hollywood, Los Angeles, and surrounding areas.

**PROJECT DETAILS**

This will be HPMC’s sixth Contract; fourth within the last five years. The prior Contract focused on new graduate nurses; the new Stroke, Chest Pain, and STEMI Center; and full utilization of a new computer system. HPMC recently invested over \$1M in new equipment and supplies such as a Surgical Robotic Machine for the Surgical Department, Ventilators for the Sub Acute Unit, Central Line kits, PleurX drainage system, and Wound Vac. HPMC also purchased a new simulation high-fidelity mannequin for its Stroke, Trach care and other Nursing care training as part of its New Grad and Transition training programs. Training in this proposal will focus on the new equipment and supplies.

Training will help HPMC achieve the following goals:

- Continuously improve nursing skills and medical knowledge
- Successfully manage all levels of patient care
- Improve standard practices for outpatient and inpatient pharmacy
- Implement new wound care practices

Although some course titles may be similar to those in prior projects, HPMC confirmed that there is no duplication of courses; topics are updated and upgraded versions.

## Training Plan

**Continuous Improvement** - Training will be offered to all occupations to learn current set-up procedures, improve efficiencies, and increase operational cost savings. Training will also focus on quality and process improvements to reduce costs and eliminate waste.

**Computer Skills** - Training will be offered to all occupations and will focus on Electronic Medical Records application and HealthStream learning modules.

**Medical Skills Training (MST)** - Training will be offered to all nurses and healthcare professionals on new medical equipment and supplies, techniques, and methodologies. Clinical Preceptor training will be provided to nurses with emphasis on bedside skills in specific units. Trainees will work with a Preceptor to validate skills, improve familiarity with patient acuity levels, and increase the level of care to meet hospital requirements.

## Union Letters

HPMC provided letters of support for this proposal from the SEIU Local 121RN Nurse Alliance representing the Registered Nurses and the SEIU-UHW United Healthcare Workers West representing the Licensed Vocational Nurses, Therapists, and Technicians.

## Special Employment Training

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

## Commitment to Training

HPMC's current annual training budget is approximately \$1.2 million, which covers administrative and training salaries, equipment, and supplies. The SEIU Education Fund provides some off-hours training opportunities for staff and some tuition help for RNs.

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

HPMC's Director of Education and Education Coordinator will oversee the administration and implementation of the project. As a successful repeat ETP contractor, HPMC has proven internal administrative procedures to effectively ensure compliance with ETP recordkeeping requirements.

Training will begin upon approval and will be delivered by the Education Coordinator, the Director of Education, Education Department clinical educators, and vendors

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0155	Los Angeles	08/01/16- 07/31/18	\$126,360	\$126,360 (100%)
ET14-0218	Los Angeles	11/25/13- 11/24/15	\$255,990	\$126,528 (49%)*
ET12-0310	Los Angeles	02/14/12- 02/13/14	\$99,844	\$99,844 (100%)

\*ET14-0218: HPMC over-performed the incumbent worker training (Job Number 1), but under-performed the Job Creation training (Job Number 2). Not all funds were utilized in Job Creation because HPMC did not hire "net" new jobs as originally anticipated.

### **DEVELOPMENT SERVICES**

N/A

### **ADMINISTRATIVE SERVICES**

N/A

### **TRAINING VENDORS**

Key Medical Resources, Inc. (Rancho Cucamonga) – Continuous Improvement and Medical Skills Didactic training

**Exhibit B: Menu Curriculum****Class/Lab Hours**

8-200

Trainees may receive any of the following:

**CONTINUOUS IMPROVEMENT**

- Case Management/Discharge Planning
- Charge Nurse Training
- Communications Skills
- Conflict Resolution
- CORE Measures
- Crisis Prevention Intervention (CPI)
- Critical Thinking Skills
- Culturally Appropriate Care
- Customer Service
- Documentation Skills
- Frontline Leadership Skills
- Organization and Time Management Skills
- Preceptor Skills
- Performance and Quality Improvement
- Team Building

**COMPUTER SKILLS**

- Microsoft Office/Excel Skills (Intermediate and Advanced)
- Electronic Medical Records Application Skills
- HealthStream Online Learning Modules

**MEDICAL SKILLS TRAINING – DIDACTIC**

- Acute Myocardial Infarction
- Advanced Cardiac Life Support (ACLS)
- Arterial Blood Gas (ABG) Interpretation
- Basic Life Support (BLS)
- Body Mechanics
- Breast Feeding & Lactation
- Care of the Cardiac 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, etc.)
- Evidence Based Practices
- Gastrointestinal Assessment and Management
- Hemodynamic Monitoring
- Infection Control
- Intravenous (IV) Insertion & Therapy
- Kinetic Therapy
- Labor, Delivery and Postpartum Nursing Skills
- Laboratory Skills
- Medical/Surgical Nursing Skills
- Medication Administration & Management
- Moderate Sedation
- Neonatal Advanced Life Support (NALS)
- Neonatal Infant Pain Scale (NIPS)
- Neonatal Nursing Skills
- Neonatal Resuscitation Provider (NRP)
- New Graduate Nursing Skills
- Occupational Therapy Skills
- Orthopedic Nursing Skills
- Ostomy & Continence Care
- Pain Management (Acute & Chronic)
- Patient Assessment & Care
- Patient Fall Prevention
- Pediatric Advanced Life Support (PALS)
- Perioperative Nursing Skills
- Physical Therapy Skills
- PICC Line Insertion
- Pre and Post-Operative Care
- Radiology Skills
- Rapid Response Skills
- Renal Assessment & Management
- Respiratory Assessment & Care
- Restraints
- Simulation
- Speech Therapy Skills
- S.T.A.B.L.E.
- Telemetry Nursing Skills
- Total Parenteral Nutrition (TPN)
- Transfer Techniques
- Triage Nursing Skills
- Trauma Nursing Skills
- Ventilator and Tracheotomy Care
- Wound & Skin Care

### **MEDICAL SKILLS TRAINING – CLINICAL PRECEPTOR**

- **Emergency Department Training**
  - Emergency Room Nursing Skills
  - OB Trauma



- Triage Nursing Skills
- Care of Pediatric Patients
- Pain Management
- Infection Control
  
- **Intensive Care Unit/Critical Care Unit Training**
  - Critical Care Nursing Skills
  - Patient Assessment & Care
  - Intra-Aortic Balloon Pump (IABP) Therapy
  - Ventilator & Tracheotomy Care
  - Hemodynamic Monitoring
  - Pre and Post-Operative Care
  - Pain Management
  - Infection Control
  
- **Laboratory Services Unit**
  - Laboratory Skills
  - Bloodborne Pathogens
  - Venipuncture
  - Laboratory Testing Procedures
  - Infection Control
  
- **Long Term Care Unit (Subacute, Skilled Nursing, Transitional Care, and Hospice)**
  - Patient Assessment & Care
  - Medical/Surgical Nursing Skills
  - Total Parenteral Nutrition (TPN)
  - Ventilator & Tracheotomy Care
  - Pre and Post-Operative Care
  - Orthopedic Nursing Skills
  - Pain Management
  - Infection Control
  
- **Medical/Surgical Unit Training**
  - Patient Assessment & Care
  - Medical/Surgical Nursing Skills
  - Pre and Post-Operative Care
  - Orthopedic Nursing Skills
  - Equipment Skills
  - Infection Control
  - Medication Administration & Management
  - Pain Management
  
- **Operating Room & Post-Anesthesia Care Unit (PACU) Training**
  - Patient Assessment & Care
  - Trauma Nursing Skills
  - Perioperative Nursing Skills
  - Pre and Post-Operative Care
  - Equipment Skills
  - Infection Control
  - Malignant Hyperthermia
  - Medication Administration & Management
  - Pain Management

- **Pediatric Services Unit**
  - Care of Pediatric Patients (Acute Care, Intensive Care)
  - Patient Assessment & Care
  - Pre and Post-Operative Care
  - Equipment Skills
  - Infection Control
  - Patient Assessment & Care
  - Pediatric Advanced Life Support (PALS)
  - Medication Administration & Management
  - Respiratory Assessment & Care
  - Infection Control
  
- **Obstetrics Unit Training**
  - Patient Assessment & Care
  - Labor, Delivery and Postpartum Skills
  - Neonatal Nursing Skills
  - S.T.A.B.L.E .
  - Electronic Fetal Monitoring
  - Neonatal Resuscitation Provider (NRP)
  - Neonatal Advanced Life Support (NALS)
  - Respiratory Assessment & Care
  - Infection Control
  
- **Radiology Services Unit**
  - Radiology Skills
  - CT Skills
  - Ultrasound Skills
  - Equipment Skills
  - Patient Assessment & Care
  - Patient Fall Prevention
  - Infection Control
  
- **Rehabilitation Services Unit**
  - Physical Therapy Skills
  - Occupational Therapy Skills
  - Speech Therapy Skills
  - Patient Assessment & Care
  - Kinetic Therapy
  - Post-Operative Care
  - Care of the Stroke Patient
  - Care of Cardiac Patients
  - Patient Fall Prevention
  - Equipment Skills
  - Infection Control
  
- **Respiratory Services Unit**
  - Respiratory Assessment & Care
  - Code Blue Response & Procedures
  - Advanced Cardiac Life Support (ACLS)
  - Basic Life Support (BLS)
  - Patient Assessment & Care
  - Care of Pediatric Patients
  - Care of the Cardiac Patient

- Ventilator & Tracheotomy Care
- Neonatal Resuscitation Provider (NRP)
- Equipment Skills
- Infection Control
  
- **Telemetry Unit Training**
  - Care of the Cardiac Patient
  - EKG & Cardiac Monitoring
  - Dysrhythmia Interpretation
  - Telemetry Nursing Skills
  - Pre and Post-Operative Care
  - Intravenous (IV) Therapy
  - Equipment Skills
  - Infection Control

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



September 10, 2018

Employment Training Panel  
c/o Linda Kim  
HPMC  
1300 North Vermont Ave  
Los Angeles, Ca 90027

**GAYLE BATISTE, RN**  
President

**JEANNIE KING, RN**  
Vice-President

**Lorraine Myrick, RN**  
Secretary-Treasurer

**SUSAN B. WEINSTEIN, RN**  
Executive Director

To whom it may concern:

SEIU 121RN is pleased to partner with Hollywood Presbyterian Medical Center to provide a structured training program for covered employees. Through this training program we hope to receive many benefits including:

- Core foundational skills to all employees allowing them to communicate better, handle conflict, think on their own, deal with customer service/ patient issues and to work more harmoniously as a team.
- Elevate basic skills where they are able to assimilate best practices into everyday work situations.
- Adequately train registered nurse graduates and retain them in employment for at least 2 years after the program's conclusion.

We have provided input into the training topics that our members need to fulfill their everyday duties more successfully and look forward to favorable approval of Hollywood Presbyterian's approval by the Employment Training Panel.

Thank you for making a program like this available to California employers and employees.

Sincerely,  


Tina Bordas, LVN  
Representative  
SEIU 121RN  
626-639-6150

1040 Lincoln Ave.  
Pasadena, CA 91103  
Phone: (626) 639-6200  
Fax: (626) 395-7538



**FIGHT FOR SAFE STAFFING AND QUALITY PATIENT CARE**

August 14, 2018

Employment Training Panel  
Hollywood Presbyterian Medical Center  
1300 North Vermont Avenue  
Los Angeles, California 90027

**RE: ETP GRANT**

To Whom It May Concern:

Service Employees International Union – United Healthcare Workers West (SEIU-UHW) is pleased to partner with Hollywood Presbyterian Medical Center to provide a structured training program for covered employees. Through this training program we hope to receive many benefits including:

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- Elevate basic skills where they are able to assimilate best practices into everyday work situations.
- Adequately train registered nurse graduates and retain them in employment for at least two (2) years after the program's conclusion.

We have provided input into the training topics that our members need to fulfill their everyday duties more successfully and look forward to favorable approval of Hollywood Presbyterian's approval by the Employment Training Panel.

Thank you for making a program like this available to California employers and employees.

For the Union,



Judith Bustamante  
Union Representative/Organizer - Hospital Division  
SEIU United Healthcare Workers – West  
5480 Ferguson Drive  
Los Angeles, California 90022  
Cell: (323) 337-4930  
Email: jbustamante@seiu-uhw.org

Cc: George L. Leisher, Jr., Vice President of Human Resources  
Josie Fregoso-Luna, Hospital Division Coordinator



UNITED HEALTHCARE  
WORKERS WEST  
SERVICE EMPLOYEES  
INTERNATIONAL  
UNION, CLC

Dave Regan - President  
Stan Lyles - Vice President

560 Thomas L. Berkley Way  
Oakland, CA 94612  
510-251-1250  
FAX 510-763-2680

5480 Ferguson Drive  
Los Angeles, CA 90022  
323-734-8399  
FAX 323-721-3538



**Training Proposal for:  
EI & EI Wood Products Corp.**

**Agreement Number: ET19-0341**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** J. Romero

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing (E)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Bernardino, Sacramento	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 400	U.S. :405	Worldwide: 405
<u>Turnover Rate:</u>	16%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
\$185,280

<b>Total ETP Funding</b>
\$155,480

**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 Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Literacy Skills, PL-Mfg. Skills	299	8-200	0	\$520	\$16.70
				Weighted Avg: 20			

**Minimum Wage by County:** \$16.70 for San Bernardino County and \$16.80 for Sacramento 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 \$2.50 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Warehouse/Inventory Worker		93
Production Worker		95
Administrative Staff		53
Forklift Operator		12
Loader		20
Research & Development		8
Manager/Supervisor		18

**INTRODUCTION**

Founded in 1967, El & El Wood Products Corp. (El Wood) ([www.elandelwoodproducts.com](http://www.elandelwoodproducts.com)) is a wholesaler and manufacturer of doors, crown moldings and pillar accessories used in residential and business establishments. The Company manufactures custom-made doors and makes flexible moldings and pillar heads using polyurethane materials. Customers include home improvement stores such as Lowes, Home Depot and other similar retailers in and outside California.

With the rise of the housing and development industry, the demand for El Wood products has increased, resulting in a 30% workforce increase in the last 12 months. The Company opened two additional facilities in Chino to accommodate its additional production lines. El Wood also purchased new CNC machines, a robotic/automatic machine. The Company also installed a new ERP system (Ponderosa) to meet product demand and improve its order and fulfillment processes. El Wood is also expanding its customer sales base in Arizona, Utah and Nevada.

El Wood must upgrade employee skills for proficiency in various equipment and machines and the Company's operation and manufacturing processes. Training will develop worker skills, enabling them to more easily promote within the Company.

## **PROJECT DETAILS**

This is El Wood's first ETP Contract. The Company plans to train workers on new equipment, ERP software system, business skills and process improvement. Training will improve worker skills in the manufacturing processes and increase productivity.

Training will also benefit employees in developing skills needed to further excel in job responsibilities and undertake tasks in more challenging positions.

### **Training Plan**

**Business Skills:** Training will be offered to Research and Development, Supervisors/Managers, Administrative Staff and Warehouse/Inventory Workers. Training will focus on customer satisfaction and process management. Trainees will learn to resolve complaints, identify problems, and propose solutions that exceed customer expectations.

**Computer Skills:** Training will be offered to all occupations to operate new software systems: Ponderosa Database System, Automatic and Robotic System, Excel and Microsoft Windows Applications. Training will also include the proper usage of software screens and functions for maximum benefit.

**Continuous Improvement:** Training will be offered to all occupations and includes key methods used in a Continuous Improvement work environment. This will allow the Company to focus efforts in better customer service and product quality.

**Literacy Skills:** Training will be offered to Production and Warehouse/Inventory Workers, Forklift Operators and Loaders.

**Manufacturing Skills:** Training will be offered to Production and Warehouse/Inventory Workers, Forklift Operators, Loaders and Supervisors/Managers. Training will include operation, preventive maintenance and repair of specialized machinery used in the manufacturing process. Trainees will also receive skills on product review from a customer's perspective.

### **Productive Laboratory**

Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. The instructor will be dedicated to training delivery during all hours of training. El Wood will provide approximately 12 hours of PL-Manufacturing Skills training to Production and Warehouse/Inventory Workers on equipment used during manufacturing. This training cannot be duplicated in a Class/Lab setting as the equipment is large and complex. PL training will be conducted at all five El & El facilities. The Company requests a 1:2 trainer-to-trainee ratio given some equipment requires two employees to operate.

### **Commitment to Training**

El Wood spends an average of \$60,000 annually in training on mandatory regulated training to ensure compliance with local, state and federal regulations. The Company also provides basic job skills training necessary in performing their job safely and correctly by shadowing 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

EI Wood is ready to start training upon approval of this proposal. The Director of Human Resources will be responsible for administering training. Two staff members will work together with department heads to schedule and coordinate training. Each facility will also have a designated administrator to assist with administration. Training will be delivered by in-house experts and vendors as needed.

**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:

**BUSINESS SKILLS**

- Communication Skills
- Decision Making
- Problem Solving

**COMPUTER SKILLS**

- Advanced Microsoft Window Applications (Word/Excel)
- Ponderosa System
- Automatic and Robotic (UPC) System

**CONTINUOUS IMPROVEMENT**

- Shop Math
- Operating Skills
- Inventory Count
- Lean Manufacturing
- Globally Harmonized System Training

**MANUFACTURING SKILLS**

- Machine Operator Training
- Wood Product Training
- Basic Shop Math Skills
- Order Count/Inventory Training (Automatic and Robotic System)

**LITERACY SKILLS**

- Vocational English as a second language

**PL Hours**

0 – 12

**MANUFACTURING SKILLS** (Ratio 1:2)

- Machine Operator Training
- Order Count/Inventory Training (Automatic and Robotic System)

Literacy Training cannot exceed 45% 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:**

**JLS Environmental Services, Inc.**

**Agreement Number: ET19-0348**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** D. Jordan

**PROJECT PROFILE**

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate SB <100	Industry Sector(s):	Services Green Technology  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Placer, Madera	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 70	U.S.: 70	Worldwide: 70
<u>Turnover Rate:</u>	19%		
<u>Managers/Supervisors:</u> (% of total trainees)	12%		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$276,500

<b>Total ETP Funding</b>
\$174,252

**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, Commercial Skills, Computer Skills, HazMat, Hazwoper, Literacy Skills, OSHA 10/30, Mgmt. Skills, PL- Commercial Skills	70	8-200	0-40	\$1,794	\$16.70
				Weighted Avg: 69			
2	Retrainee Job Creation Initiative SB < 100	Business Skills, Commercial Skills, Computer Skills, HazMat, Hazwoper, Literacy Skills, OSHA 10/30, Mgmt. Skills, PL- Commercial Skills	24	8-200	0-40	\$2,028	*\$13.66
				Weighted Avg: 78			

\*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 Number 1: \$16.70 per hour for Placer and Madera counties. Job Number 2 (Job Creation): \$13.66 per hour for Placer and Madera 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 \$2.50 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		
Accounting Staff		5
Estimator		2
Lead Technician		12
Operations Staff		6
Project Manager		5
Technician		38
Owner		2

<b>Job Number 2</b>		
Estimator		1
Lead Technician		5
Operations Staff		1
Project Manager		2
Technician		14
Manager		1

## **INTRODUCTION**

Founded in 2002 and located in Loomis, JLS Environmental Services, Inc. (JLS) ([www.jlsinc.com](http://www.jlsinc.com)) is a full restoration contractor that provides remediation, destructive testing, concrete preparation, construction and restoration, and energy retrofitting services for residential, commercial, and civic properties. Training under this proposal will provide training for the Loomis location and its satellite location in Madera. This is JLS' fourth ETP contract, the fourth in the last five years.

### **Veterans Program**

JLS does not actively recruit Veterans.

### **Need For Training**

In its previous proposal, JLS staff was cross-trained in skills to perform work in multiple trades such as Drywall, Stucco, Painting, and Remediation of Hazardous Materials. Many staff members possessed trade skills but lacked technical skills. Recently JLS has become a member of Lionsbridge Contractor Group (LCG), which is a national group of contractors. LCG member contractors receive qualified leads from insurance claims and property home owners. Being a member of LCG brings challenges for in implementing LCG's required processes and software. One of the new processes that JLS staff must be trained to perform is the removal of water in flooding projects. JLS staff will also receive training on Xactimate software allowing them to interact with LCG and complete projects.

Additionally, JLS is starting a new division that will include waterproofing, adding a water barrier to floors and other surfaces, sealing joints, filling cracks and adding decorative coatings. Staff will receive training on Moisture Mapping software (MICA). MICA ensures that moisture levels are within specific parameters. JLS is also certified with Koster Coating systems and will continue to train staff on the Koster system. JLS will also deliver training on Business, Continuous Improvement and Literacy Skills.

There are some training topics included in the curriculum similar to topics from the previous Agreement; however, content has been updated. Trainees will not receive duplicate training.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

Being a member of the Lionsbridge Contractor Group (LCG) has led to significant increase in demand for services. To meet this customer demand, JLS must hire additional staff. New staff will enable JLS to continue to provide excellent customer service while handling the increased

workload. Additionally, JLS is starting a new coatings division that will further increase demand for its services.

JLS has committed to hiring 24 new employees (Job Number 2). Employees will be cross-trained to perform multiple trades. The Company will be hiring Estimators, Lead Technicians, Operations Staff, Project Managers, Technicians and a Manager. The date-of-hire for 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.

## **PROJECT DETAILS**

### **Training Plan**

Training will be delivered via classroom/laboratory, Videoconferencing, E-Learning, Computer-Based Training (CBT), and Productive Lab methods. In-house subject matter experts and external training vendors may be utilized to deliver training in the following:

**Business Skills:** Training will be offered to all occupations. Training will focus on strengthening customer service skills and improving workflow processes. Training topics include Customer Relationship Management, Communication Skills, Project Requirements Analysis and Specifications, and Strategic Planning.

**Literacy Skills:** Training will be offered to Technicians. Training will focus on staff members that require improvement with the understanding of the English language as it pertains to their specific job duties. Training topics include Vocational English as a Second Language and Basic Math.

**Commercial Skills:** Training will be offered to all occupations. Training will focus on cross-training new and incumbent staff on multiple trades. Training topics include Coatings Installation Techniques, Demolition, Drywall Repair and Installation, and Blue Print Reading.

**Management Skills:** Training will be offered to the Owner, Project Manager and Manager. Training will focus on improving management skills. The Owner, Project Manager and Managers typically manage worksites and having the responsibility of overseeing a jobsite will require training to improve those management skills. Training topics include Decision Making, Leadership and Teambuilding.

**Computer Skills:** Training will be offered to all occupations. With the transition to paperless technologies, training will provide all staff with the ability to operate new software and devices accordingly. Training topics include Xactimate/Xactware, Moisture Mapping Software MICA, DocsVault, and Inventory Control Software.

**Continuous Improvement:** Training will be offered to all occupations. Training will focus on improving production operations and lean procedures. Training topics Process Improvement, Startegic Planning, Cross Training, Lean Procedures Practices, and Quality Management.

**Hazardous Materials:** Training will be delivered to Project Manager, Lead Technicians and Technicians. Training will allow staff to operate in an appropriate manner when handling hazardous materials and conditions. Topics include Hazardous Material Handling/Cleaning and Disposal of Hazardous Materials.

### **Certified Safety Training**

**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 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.

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 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 unless they work full time onsite at the clean-up location.

### **Productive Laboratory**

Trainees may provide service for profit as part of Productive Laboratory (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 its services, certain training cannot be replicated in a class/lab environment. PL training will allow practical, hands-on experience in a working environment to develop the skillsets for trainees to be able to perform the multiple trades such as Drywall, Stucco, Painting, and Remediation of Hazardous Materials.

JLS will provide training to Technicians and Lead Technicians. Equipment to be used during PL includes KOSTER Systems, Coatings, Stucco, Odor Control Equipment, Framing Repairs, Drywall and Carpet Cleaning. Training will be taught by subject matter-experts with demonstrated knowledge and expertise in the field. JLS staff works in buildings with many combinations building materials, repair and maintenance issues that require different types of construction techniques. In some instances it will take eight or nine different examples just to learn one technique. Many techniques must be learned for Technicians to complete one project. Trainees also have new and highly technical training in mold, waterproofing, drywall repair and stucco repair that is critical to their job duties. Because work being performed is normally done in small groups, training will be provided at a 1:3 trainer-to-trainee ratio. Instructors will monitor trainee competencies before the trainee is deemed competent for each trade skillset.

### **Computer-Based Training**

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees in Job Numbers 1 and 2 will receive between 0 - 40 hours of CBT.

### **Commitment to Training**

JLS training budget is approximately \$200,000. ETP funds will not displace the existing financial commitment to training. The Company provides training in restoration containment, building containment, management training for project managers, and ethics and labor relations topics. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ **Training Infrastructure**

JLS has a structured training plan in place. The Office Manager will oversee project administration and four Administrative staff members have been assigned to handle training rosters and tracking performance. Sierra Consulting Services, Inc. will assist with administrative duties. Training will be delivered by in-house experts and vendors as needed.

**Green/Clean Operations**

JLS provides consulting, remediation and clean up services to residential and commercial clients interested in green remodeling. JLS has also updated their fleet of vehicles with newer, more fuel efficient models with lower emission ratings.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

The following table summarizes Contractor's performance under an active ETP Agreement:

<b>Agreement No.</b>	<b>Approved Amount</b>	<b>Term</b>	<b>No. Trainees (Estimated)</b>	<b>No. Completed Training</b>	<b>No. Retained</b>
ET17-0345	\$249,180	12/19/16 – 12/18/18	129	122	0

Based on ETP Systems, 14,256 reimbursable hours have been tracked for potential earnings of \$255,106.80 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through December 2018.

**DEVELOPMENT SERVICES**

Sierra Consulting Services, Inc. in El Dorado Hills assisted with development for a flat fee of \$11,600.

**ADMINISTRATIVE SERVICES**

Sierra Consulting Services, Inc. will also perform administrative services for a fee not to exceed 7% of payment earned.

**TRAINING VENDORS**

To Be Determined



## **Exhibit B: Menu Curriculum**

### **Class/Lab Hours/Videoconference/E-Learning**

8 – 200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Accounting
- Business Fundamentals
- Business Performance
- Business Writing
- Behavior Style Strategies
- Conflict Resolution
- Customer Relationship Management
- Customer Service
- Communication Skills
- Cost Control
- Dealing with Difficult People
- Essential Skills for the New Supervisor
- Financial Analysis
- Insurance Processing
- Leadership
- Marketing/Sales Techniques
- Negotiating
- Operational Skills
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Retaining Customers
- Relationship Building
- Strategic Planning
- Successful Selling Techniques/Sales
- Time Management

#### **COMMERCIAL SKILLS**

- Applied Microbial Remediation
- Baseboard & Trim Installation
- Blue Print Reading and Application
- Blue Print Reading and Schematics
- Cabinet Repair & Installation
- Carpet Cleaning
- Coatings Blending
- Coatings Installation Techniques
- Coatings Matching
- Coatings Systems
- Cross-training in production equipment/skills
- Demolition
- Destructive Testing – Investigation
- Destructive Testing – Report
- Drywall Repair & Installation

- Drywall Textures Techniques
- Emergency Service
- Equipment Maintenance
- Equipment Operation
- Fire & Smoke Damage Repair
- Hydrating Repairs
- Inventory Control
- KOSTER System Installation
- Large Finish Carpentry Repairs
- Large Lath/Shear Repairs
- Large Rough Carpentry Repairs
- Large Stucco Repairs
- Lead Base Paint Removal
- Light Construction Job Site Sequencing
- Light Construction Ream Support
- Light construction: Job Site Preparation
- Medium Finish Carpentry Repairs
- Medium Lath/Shear Repairs
- Medium Rough Carpentry Repairs
- Medium Stucco Repairs
- Metal Stud Framing Repairs
- Moisture Mapping
- Observation Report
- Odor Control Application
- Paint Matching
- Painting / Blending Techniques
- Remediation Assessment
- Setting Containments
- Small Finish Carpentry Repairs
- Small Lath/Shear Repairs
- Small Rough Carpentry Repairs
- Small Stucco Repairs
- Tile Repair Techniques
- Troubleshooting
- Warehousing
- Water Damage Repair
- Water Test
- Waterproofing Systems
- Wood Framing Repairs
- Work Order Processing

### **COMPUTER SKILLS**

- Adobe App
- Advanced Microsoft Office
- Client Relationship Management Software
- Commercial Card Processing Software
- DocsVault
- Inventory Control Software
- MICA - Moisture Mapping Software
- Photo Management Software

- Proven Solutions Mobile App
- Quantum Payroll – Certified Payroll
- Software Applications and Equipment
- Xactimate/Xactware

### **CONTINUOUS IMPROVEMENT**

- Change Management
- Communication Skills
- Creating a Quality Organization
- Cross Training
- Decision Making
- Estimating Process Improvement
- Inventory Control System
- Leadership Skills for Frontline Workers
- Lean Procedures Practices
- Meeting Management
- Problem Solving and Decision Making
- Process Improvement
- Production Operations/Workflow
- Production Scheduling
- Project Management
- Quality Management
- Quality Measurement Systems
- Strategic Planning
- Team Building
- Teamwork Development Skills
- Time Management

### **HAZARDOUS MATERIALS**

- Asbestos Removal
- Hazardous Chemical Cleaning/Handling
- Hazardous Materials Handling
- Hazardous Waste Cleaning
- Lead Base Paint Removal Technician
- Restoration/Remediation – MOLD
- Rust Removal

### **MANAGEMENT SKILLS (Owner & Managers Only)**

- Administration
- Decision Making
- Effective Meetings for Leaders
- Finance for Technical Managers
- Leadership
- Motivation
- Supervisor Skills
- Teambuilding

**LITERACY SKILLS**

- Basic Math
- Vocational English
- Vocational English as a Second Language
- Vocational Spanish as a Second Language

**OSHA 10/30 (Certified OSHA Instructor)**

- OSHA 10
- OSHA 30

**HAZWOPER 40**

- Hazwoper 40

Literacy Training cannot exceed 45% of total training hours per-trainee  
 Safety Training cannot exceed 10% of total training hours per-trainee

**PL Hours**

0 – 80

**COMMERCIAL SKILLS (limited ratio 1:3)**

- Applied Microbial Remediation
- Baseboard & Trim Installation
- Blue Print Reading and Application
- Cabinet Repair & Installation
- Carpet Cleaning
- Coatings Blending
- Coatings Installation Techniques
- Coatings Matching
- Coatings Systems
- Demolition
- Destructive Testing – Investigation
- Destructive Testing – Report
- Drywall Repair & Installation
- Drywall Textures Techniques
- Emergency Service
- Fire & Smoke Damage Repair
- Hydrating Repairs
- KOSTER Systems
- Large Finish Carpentry Repairs
- Large Lath/Shear Repairs
- Large Rough Carpentry Repairs
- Large Stucco Repairs
- Lead Base Paint Removal
- Light construction job site sequencing
- Light construction team support
- Light construction: job site preparation
- Medium Finish Carpentry Repairs
- Medium Lath/Shear Repairs
- Medium Rough Carpentry Repairs
- Medium Stucco Repairs
- Metal Stud Framing Repairs

- Moisture Mapping
- Observation Report
- Odor Control Equipment
- Paint Matching
- Painting / Blending Techniques
- Remediation Assessment
- Setting Containments
- Small Finish Carpentry Repairs
- Small Lath/Shear Repairs
- Small Rough Carpentry Repairs
- Small Stucco Repairs
- Tile Repair Techniques
- Water Damage Repair
- Water Test
- Waterproofing Systems
- Wood Framing Repairs
- Work Order Processing

**CBT Hours**

0 – 40

**COMMERCIAL SKILLS**

- Back Safety Basics & Update 31 mins
- Company Set-Up & Preferences 25 mins
- Confined Space For Construction 30 mins
- Driving Safety: The Basics 20 mins
- Eye Safety in Construction Environments & Update 30 mins
- Forklift Safety 21 mins
- Hand Injury Prevention – Basic Training 11 mins
- Hand Wrist and Finger Safety 13 mins
- Hand and Power Tool Safety 40mins
- Heat Stress 15 mins
- Housekeeping and Accident Prevention 14 mins
- Inventory & Warehouse 40 mins
- Ladder Safety & Update 25 mins
- Lessons Learned from Hand Injuries – Graphic 20 mins
- Lockout/Tagout Training 20 mins
- Machine Guarding & Operator Safety 20 mins
- Personal Protective Equipment in Construction Environments 20 mins
- Power Saw Safety 10 mins
- Surviving The Fall – The Proper Use of Your Personal Fall Arrest System 20 mins

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



**Training Proposal for:**

**JobTrain, Inc.**

**Agreement Number: ET19-0353**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** C. Hoover

**PROJECT PROFILE**

Contract Attributes:	Medical Skills Training New Hire Ex-Offender At-Risk Youth Multiple Barriers SET	Industry Sector(s):	MEC (H) Healthcare (62) Construction (23)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Mateo	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$184,990		\$14,525 8-12%		\$199,515

In-Kind Contribution:	50% of Total ETP Funding Required	\$119,000
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**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 Medical Skills Training	Business Skills, Computer Skills, Cont. Imp., MS-Didactic, MS-Preceptor	40	8-200	0	\$3,225	\$18.22
				Weighted Avg: 116			
2	New Hire SET Ex-Offender At-Risk Youth Multiple Barriers Medical Skills Training	Business Skills, Computer Skills, Cont. Imp., MS-Didactic, MS-Preceptor, Job Readiness Skills, OSHA 10/30, HAZWOPPER, HAZMAT	15	8-260	0	\$4,701	\$15.18
				Weighted Avg: 165			

**Minimum Wage by County: Job Number 1 (Retrainee)- \$18.22 per hour for San Mateo County**  
**Job Number 2 (New Hire)- \$15.18 per hour for San Mateo 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 Employer may use up to \$0.22 per hour to meet the Post-Retention Wage in Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1 (Retrainee):</b>		
Certified Nurse Assistant		40
<b>Job Number 2 (New Hire):</b>		
Certified Nurse Assistant		5
Medical Assistant		5
Carpenter (Entry Level)		5

**INTRODUCTION**

Founded in 1965 and headquartered in Menlo Park, JobTrain, Inc. (JobTrain) ([www.jobtrainworks.org](http://www.jobtrainworks.org)) is a private, non-profit training agency that empowers low-income individuals to gain the job skills needed to obtain sustainable employment in high-demand and

emerging career pathways within the Healthcare, Construction, Web Technology, Culinary and Business industries. This project will focus on Healthcare (Certified Nurse Assistants/Medical Assistants) and Construction (entry-level Carpenters) occupations. ETP training will be delivered out of its Menlo Park headquarters and via a mobile classroom at its participating employer's Redwood City location (San Mateo County). This is JobTrain's sixth ETP contract, and it's first within the last five years.

JobTrain provides services to approximately 6,000 people each year of which 1,000 benefit from intensive-career training, which includes skills' upgrades such as GED, ESL and digital-skills' development. JobTrain reaches the additional 5,000 through outreach, presentations and tabling events. In Fiscal Year 2018 (FY18), JobTrains programs and services led to 77% of its graduates in career-training programs obtaining a job with an average wage of \$21.53 per hour.

JobTrain is requesting ETP funds to conduct skills-upgrade training for 40 entry-level Nurse Assistants Retraitees to become Certified Nurse Assistants (CNA) from one participating employer- Kensington Sr. Living Services (Kensington). It also plans to train 15 trainees who are at-risk youth, ex-offenders or individuals with multiple barriers to become Medical Assistants (MA), CNAs and (entry-level) Carpenters.

## **Veterans**

Though there is not a Veterans component in this project, JobTrain is a strong partner with the Employment Development Department (EDD). EDD has a location within JobTrain's office, and they collaborate to serve clients including veterans. EDD has a Veteran's Program that offers many services for veterans at no fee including priority job referrals.

## **Healthcare Demand**

With unemployment at an all-time low in San Mateo County, employer demand for occupations is high. Trainees need good jobs to help them achieve economic mobility in the region, and employers need qualified, well-trained staff. Occupations in San Francisco-San Mateo-Redwood City metropolitan statistical area (MSA) with the largest anticipated job growth include MAs. According to the Bureau of Labor Statistics:

- Employment of MAs is expected to grow 29% from 2016 to 2026.
- Employment of CNAs is expected to grow 21% from 2016 to 2026

The Employment Development Department (EDD) projects growth in healthcare jobs of up to 22% in the San Francisco-San Mateo MSA by 2024, resulting in a projected total of over 300,000 healthcare jobs. The Bay Area's population is projected to increase by 30% by 2040 with a 137% growth in the 65 and over age group, according to Plan Bay Area 2040. This demographic shift will drive significantly increased demand for care and the healthcare professionals to provide it.

## **Construction Demand**

Construction trades (entry-level Carpenters) – according to the Bureau of Labor Statistics, employment of carpenters is projected to grow 8% from 2016 to 2026, which is about as fast as the average for all occupations. However, increased levels of new homebuilding and remodeling activity will require more carpenters. In the San Francisco Bay Area, construction is booming and demand for carpenters is strong.



## **PROJECT DETAILS**

### **Retrainee (Job Number 1)**

#### **Employer Demand**

Kensington approached JobTrain in June 2018 to explore a partnership to up-skill its current entry-level care nurse assistants with the following goals:

- Fill much needed and hard to staff CNA positions with current NA staff.
- Increase health-care staff retention via skill and credential upgrade with pay increases.

Kensington will launch this new training partnership with JobTrain at its Redwood City facility with future plans to expand the training program at its sites across California. However, at this time, it plans to train 40 from its Redwood City facility.

### **New Hire (Job Number 2)**

#### **Need for Training**

JobTrain will train in MA, CNA and Project Build – (entry-level) Carpenters. These sectors are experiencing substantial job growth coupled with significant worker shortages. The following are current growth projections for job growth and labor demands:

- MA - The growth of the aging baby-boomer population will continue to increase demand for preventive medical services, which are often provided by physicians. As a result, physicians will hire more assistants to perform routine administrative and clinical duties allowing the physicians to see more patients. In FY18, JobTrain's MA program had 144 enrollments with 135 completing training and 126 trainees being placed into jobs that had an average hourly wage of \$22.20.
- CNA - As the baby-boomer population ages, nursing assistants and orderlies will be needed to assist and care for elderly patients in long-term care facilities such as nursing homes. Older people are more likely to have disorders such as dementia or to live with chronic diseases such as heart disease and diabetes. More nursing assistants will be needed to care for patients with these conditions. Additionally, patient preferences and shifts in federal and state funding are increasing the demand for home and long-term care. In FY18, JobTrain's CNA program had 70 enrollments with 62 completing training and 46 trainees being placed into jobs that had an average hourly wage of \$16.90.
- Carpenters – Due to San Francisco Bay Area's booming construction industry and increased levels of homebuilding/remodeling, demand for carpenters is high. In FY18, JobTrain's Carpenter program had 46 enrollments with 35 completing training and 27 trainees being placed into jobs that had an average hourly wage of \$19.20.

New-hire training hours are capped at 260 per trainee. In this project, the new-hire population consists of at-risk youth, ex-offenders or individuals with multiple barriers to employment. These trainees require approximately 165 hours per trainee to obtain the skills necessary to attain good paying jobs within the Healthcare and Construction sectors.

## Training Plan

JobTrain will deliver the following training via Class/Lab or E-Learning:

**Business Skills:** This training will be offered to CNA and MA trainees in Interpersonal Communication, Billing & Coding, Customer Service, and Schedule & Financial Management.

**Commercial Skills:** This training will be offered to Carpenters in Building Materials, Construction Math, Basic Understanding of Blueprints, Familiarity and Appropriate Use of Hand-Power Tools, and Green-Building Philosophy and Techniques.

**Computer Skills:** This training will be offered to MA trainees in MediSoft (medical software system).

**Continuous Improvement:** This training will be offered to all occupations in Goal Setting and Financial Literacy. New Hire – CNA, MA and Carpenter trainees will also receive Time Management, Critical Thinking and Behavior Modifications courses.

**Hazardous Materials (HAZMAT):** This training will be offered to Carpenters in Hazardous Material Identification, Handling and Abatement courses.

**Medical Skills:** This training will be offered to CNA and MA trainees. An estimated 45 nurses will be delivered courses via Didactic and Clinical with Preceptor delivery methods. Training will include Body Mechanics, Vital Signs, Long-Term Care, Dementia Care, Infection Control, Nutrition, Bandaging Techniques, Diagnostic Procedure, and Electrocardiogram (EKG) Procedures.

**Job Readiness Skills:** This training will be offered to New Hire CNA, MA and Carpenter trainees in Workplace Success, Anger Management, Resume Development, and Interview Skills.

## Certified Safety Training

1. 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 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.
2. 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 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.

## Curriculum Development

Job Number 1: Curriculum for Kensington is driven by State of California’s licensure requirements and Kensington’s employment needs. JobTrain’s CNA Site Director has provided technical expertise in developing the curriculum.

Job Number 2: Curriculum for the New Hire courses is driven by licensure and certification requirements, employer feedback regarding its specific skill and needs, and JobTrain's experience of preparing candidates for career pathways. JobTrain solicits regular feedback from students, graduates and employer partners to assess the quality of the curriculum. This feedback is collected through surveys, focus groups and advisory tables.

### **Commitment to 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

The Chief Executive Officer and Chief Operations Officer will provide administrative oversight. The Client Services Manager will work with two Career Development Specialists (Healthcare and Construction), an Outreach and Enrollment Manager (Dedicated Administrator), and the Finance Director to administer the project. CNA Site Director and four in-house trainers will coordinate the delivery of training.

### **Special Employment Training (SET)/Multiple Barriers (New Hire)**

Under SET, the participating employer is not required to demonstrate out-of-state competition. Trainees must earn at least the statewide average hourly wage at the end of the retention period. However, these trainees are subject to the ETP New Hire Minimum Wage rather than the Statewide Average Hourly Wage. Trainees may also receive a higher portion of Job Readiness Skills (up to 50%).

Note: Contractor must pre-screen trainees to determine their eligibility prior to enrolling trainees. Barriers must be identified and kept on file with the Contractor. Contractor must demonstrate training will help trainees address the identified barriers.

#### ➤ Wage and Retention Modifications

Trainees in Job Number 2 have two or more barriers to employment (e.g., mental or physical disability, limited English proficiency, limited math skills). These trainees may receive the ETP New Hire Minimum Wage- \$15.18 (post-retention). JobTrain requests this wage modification.

#### ➤ Retention Modification

The Panel may also modify the retention period for these trainees, making it satisfied by employment of at least 90 days out of 120 consecutive days with up to three employers. Incidental placement with public and non-profit entities is permissible, not to exceed 25% of the total number of trainees retained in employment. JobTrain requests this modification.

### **SET/Ex-Offender/At-Risk Youth (New Hire)**

Job Number 2 will be funded as Special Employment Training/Multiple Barriers under the Ex-Offender/At-Risk Youth Guidelines. JobTrain will be responsible for documenting the eligibility criteria for this program.

For Ex-Offenders, this must include: case number from the conviction proceeding; parole or probation officer's name and phone number; and records from the institution where incarcerated.

For At-Risk Youth, the documentation must show that the trainee is between 18 and 23 years of age. They will be deemed at-risk if they are not in school or employed full-time, and meet other criteria specified in the pilot program guidelines.

➤ Retention Modification

Retention may be satisfied by employment of at least 30 hours a week for at least 90 days, out of 120 consecutive days with up to three employers. For occupations in which workers are hired for short-term jobs, retention may be satisfied by employment of at least 500 hours within 272 days. Incidental placement with public and non-profit entities is permissible, not to exceed 25% of the total number of trainees retained in employment. JobTrain requests this retention modification.

➤ Wage Modification

JobTrain requests a post-retention wage modification for these trainees at 25% below the ETP Minimum Wage. This modification is permissible under the At-Risk Youth Project Guidelines for good cause. As mentioned above, JobTrain's trainees are placed into secure jobs with known wage progression. JobTrain requests this wage modification.

## Impact/Outcome

Training delivered in this project will lead to trainees earning the following certifications:

- Certified Nurse Assistant Certification
- Medical Assistant Certification
- Home Health Aide Certification
- Cardiopulmonary Resuscitation (CPR) Certification
- HAZWOPER 40 Certification
- OSHA 10/30 Certification
- Forklift Certification
- Confined Space Certification
- HILTI Powder-Actuated Certification

## Marketing and Support Costs (Retrainee and New Hire)

JobTrain's Development Department advertises its programs through direct mail, publishes marketing materials and launches social media campaigns. In addition, JobTrain program staff conducts extensive marketing of its programs by engaging with businesses and potential students throughout San Mateo County. EDD has an on-site office at JobTrain, making it convenient for job seekers to apply for our Job Trainings, and access services to help them become employed.

JobTrain markets its programs through outreach to nonprofit and community partners, including Second Harvest Food Bank, HIP Housing, Daybreak Shelter, LifeMoves, Boys and Girls Club of the Peninsula, Peninsula Family Services, Redwood City Community Schools, Sequoia Union High School District, Nuestra Casa and Fair Oaks Community Center, and Community Legal Services in East Palo Alto (CLSEPA). It partners with One East Palo Alto for youth employment.

JobTrain partners with employers to connect students with careers. Healthcare partners include Palo Alto Medical Foundation, Kaiser Permanente & Stanford Health Care. Construction partners include Carpenter Local 217 & Laborers Local 261. JobTrain request 8% support costs for Job Number 1 (Retrainee) and 12% support costs for Job Number 2 (New Hire) to assist with the effective implementation of this project. Staff recommends both of the support costs' percentages.

## **Training Agency Certification**

Training agency eligibility requires certification by an independent third-party, as required for the type of school and course of study. Most schools must also be licensed by the Bureau of Private Postsecondary Education (BPPE).

As indicate above, JobTrain is eligible as a training agency based on the following:

- BPPE licensure valid until March 26, 2020
- Certification by Western Association of Schools and Colleges (WASC)

## **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**

JobTrain will use a Learning Management System (Salesforce) to document all ETP training. The system has been reviewed and approved by ETP.

## **RECOMMENDATION**

Staff recommends approval of this proposal, with the Waiver Request of 1:20 for its New Hire Job Number.

## **Trainer-to-Trainee Ratio Waiver (New Hire)**

JobTrain is requesting a waiver to ETP's standard New Hire trainer-to-trainee ratio of 1:15 to allow a 1:20 ratio. JobTrain has had a successful business model of delivering training to its New Hires with a trainer-to-trainee ratio of 1:24, which has been effective with an average course-completion rate is in excess of 85%. Job-placement success is historically above 75% with average wages at nearly \$22.00 per hour.

Trainees are placed into good jobs with high wages, and JobTrain receives positive feedback from employers.

## **DEVELOPMENT SERVICES**

N/A

## **ADMINISTRATIVE SERVICES**

N/A

## **TRAINING VENDORS**

N/A

**Exhibit B: Menu Curriculum****Class/Lab/E-Learning Hours**

8-200 (Job Number 1)

Trainees may receive any of the following:

**Retrainee****BUSINESS SKILLS**

- Customer Service

**CONTINUOUS IMPROVEMENT**

- Goal Setting
- Financial Literacy

**MEDICAL SKILLS - DIDACTIC**

- Body Mechanics
- Weights and Measures (foods/liquids and patient height/weight)
- Resident-Care Skills (oral care, baths, shaving, dressing, meals)
- Resident-Care Procedures (bandages, enemas, specimen collections)
- Vital Signs (temperature, pulse, blood pressure, respiration)
- Geriatric Nutrition (including special diets)
- Emergency Procedures within a Skilled-Nursing Facility
- Long-Term Care
- Aging-Body Systems
- Common-System Changes
- Common Disorders
- Rehabilitative and Restorative Care
- Observation and Charting
- Management of Death and Dying
- Life Support for Healthcare Providers (CPR Certification)
- First Aid for Adults (First-Aid Certification)

**MEDICAL SKILLS – CLINICAL PRECEPTOR**

- Medical and Surgical Asepsis
- Body Mechanics
- Rehabilitative / Restorative Care
- Patient Care and Assessment
- Resident-Care Procedure
- Vital Signs
- Weight and Measures
- Nutrition
- Observation and Charting
- Dementia Care
- Infection Control
- Carrying for Residence with Tubing
- Residential-Care Procedure for Special-Needs Patients
- Resident Rights

**Class/Lab/E-Learning Hours**

8-260 (Job Number 2)

### **New Hire – Medical Assistant (MA)**

#### **BUSINESS SKILLS**

- Medical Laws & Ethics
- Interpersonal Communication
- Patient History (Exam & Treatment Areas)
- Patient Education
- Schedule & Financial Management
- Billing & Coding
- Customer Service

#### **COMPUTER SKILLS**

- MediSoft (Medical Software System)

#### **CONTINUOUS IMPROVEMENT**

- Time Management
- Critical Thinking
- Goal Setting
- Financial Literacy
- Behavior Modifications

#### **MEDICAL SKILLS - DIDACTIC**

- Clinical Skills & Assisting in Specialty Exams
- Assist with Minor Surgery, Orientation to Lab, Sterilization Techniques, Microbiology & Diseases, Physical Therapy, Nutrition & Health
- Vital Signs
- Autoclave & Sterilization Process
- First Aid & Bandaging Techniques
- HIPAA & OSHA
- Injections and Venipuncture
- Assist with Physical Exams
- Electrocardiogram (EKG) Procedures
- Pre-Operative and Post-Operation Procedures
- Cardiopulmonary Resuscitation (CPR) Certification

#### **MEDICAL SKILLS – CLINICAL PRECEPTOR**

- Doctor Exams
- Vital Signs
- Lab Referrals
- Diagnostic Procedures
- Bandaging Techniques
- Lab-Specimen Processing
- Injections and Venipunctures
- Sterilization (Autoclave-Exam Instruments and Devices)
- Ear Irrigation
- EKG

**JOB READINESS SKILLS\***

- Resume Development
- Interview Skills
- Workplace Success
- Conflict Resolution
- Communication Skills & Public Speaking
- Clinical Requirements
- Communication Skills (Oral and Written)
- Interpersonal Skills in the Skilled-Nursing Facility
- Workplace Behaviors

*\*Cannot exceed 50% of a trainee's total training hours*

**New Hire – Certified Nursing Assistant (CNA)****BUSINESS SKILLS**

- Care Regulations and Legal Implications
- Standards of Care for a Residential / Skilled-Nursing Facility
- CNA-Program Regulations
- Ethical and Professional-Job Description of a CNA
- Patient Rights in a Skilled-Nursing Facility and Elsewhere
- Maintenance of a Safe Environment in a Skilled-Nursing Facility
- Principles of Asepsis within the Skilled-Nursing Facility
- Customer Service

**CONTINUOUS IMPROVEMENT**

- Time Management
- Critical Thinking
- Goal Setting
- Financial Literacy
- Behavior Modifications

**MEDICAL SKILLS - DIDACTIC**

- Body Mechanics
- Weights and Measures (foods/liquids and patient height/weight)
- Resident-Care Skills (oral care, baths, shaving, dressing, meals)
- Resident-Care Procedures (bandages, enemas, specimen collections)
- Vital Signs (temperature, pulse, blood pressure, respiration)
- Geriatric Nutrition (including special diets)
- Emergency Procedures (Skilled-Nursing facility)
- Long-Term Care
- Aging-Body Systems
- Common-System Changes
- Common Disorders
- Rehabilitative and Restorative Care
- Observation and Charting
- Management of Death and Dying
- Life Support for Healthcare Providers (CPR Certification)
- First Aid for Adults (First-Aid Certification)
- Home Health Aide Certification



**MEDICAL SKILLS – CLINICAL PRECEPTOR**

- Medical and Surgical Asepsis
- Body Mechanics
- Rehabilitative / Restorative Care
- Patient Care and Assessment
- Resident Care Procedure
- Vital Signs
- Weight and Measures
- Nutrition
- Observation and Charting
- Dementia Care
- Infection Control
- Carrying for Residence with Tubing
- Residential-Care Procedure for Special-Needs Patients
- Resident Rights

**JOB READINESS SKILLS\***

- Workplace Success
- Conflict Resolution
- Resume Development
- Interview Skills
- Communication Skills & Public Speaking
- Clinical Requirements
- Communication Skills (Oral and Written)
- Interpersonal Skills in the Skilled-Nursing Facility
- Workplace Behaviors

*\*Cannot exceed 50% of a trainee's total training hours*

**New Hire – Carpenter****COMMERCIAL SKILLS**

- Building Materials
- Familiarity and Appropriate Use of Hand-Power Tools
- Jobsite and Tool Handling (Safety Practices)
- Fork-Lift Operation
  - Forklift and Gradall® Operator Certification
- Confined Space Certification
- CPR Certification
- Green-Building Philosophy and Techniques
- Basic Understanding of Blueprints
- Construction Math

**CONTINUOUS IMPROVEMENT**

- Time Management
- Critical Thinking
- Goal Setting
- Financial Literacy
- Behavior Modifications

**HAZARDOUS MATERIALS (HAZMAT)**

- Identification
- Handling
- Abatement

**HAZWOPER**

- HAZWOPER 40 (Certification)

**OSHA 10/30 (OSHA Certified Instructor)**

- OSHA 10
- OSHA 30

**JOB READINESS SKILLS\***

- Workplace Success
- Conflict Resolution
- Resume Development
- Interview Skills
- Communication Skills & Public Speaking
- Oral and Written Communication Skills
- Workplace Behaviors

*\*Cannot exceed 50% of a trainee's total training hours*

Safety Training cannot exceed 10% of total training hours per-trainee (This cap does not apply to HAZMAT, OSHA 10/30 or HAZWOPER)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. Reimbursement for new hire training is capped at 260 total training hours per trainee.



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**JSR Micro, Inc.**

**Agreement Number: ET19-0351**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** R. Jackson

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Manufacturing (E) Manufacturing (33) Biotechnology and Life Sciences (54+)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Santa Clara	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 173	U.S.:203	Worldwide: 203
<u>Turnover Rate:</u>	7%		
<u>Managers/Supervisors:</u> (% of total trainees)	13%		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$243,065

<b>Total ETP Funding</b>
\$124,358

**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, Cont. Improv. HazMat, Mfg. Skills, Literacy Skills, OSHA 10/30, Hazwoper	153	8-200	0-3	\$598	\$18.22
				Weighted Avg: 23			
2	Retrainee Job Creation	Business Skills, Commercial Skills, Computer Skills, Cont. Improv. HazMat, Mfg. Skills, Literacy Skills, OSHA 10/30, Hazwoper	8	8-200	0-3	\$4,108	\$15.18
				Weighted Avg: 158			

**Minimum Wage by County:** Job 1 - \$18.22 for Santa Clara County.  
Job 2 - \$15.18 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

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
<b>Job 1</b>		
Production Staff		77
Technical Staff		32
Supervisor		12
Manager		8
Administrative Staff		24
<b>Job 2</b>		
Production Staff		3
Technical Staff		3
Supervisor		1
Administrative Staff		1

## **INTRODUCTION**

Established in 1990, JSR Micro, Inc. (JSR) ([www.jsrmicro.com](http://www.jsrmicro.com)), a US-based subsidiary of JSR Corporation, is a manufacturer of materials sold to large Original Equipment Manufacturers (OEM). The customer base includes companies in the semiconductor and electronic-related industries; and energy and life sciences laboratories and research facilities. Products include advanced photo resists, Chemical Mechanical Polishing and stored-energy components, bio-process components, research and diagnostic re-agents, and polymers prepared for customers across multiple industries.

JSR's high-performance materials and components are used in OEM for advanced materials, specialty chemicals, and packaging materials. In addition, the Company provides research and development, custom design, and engineering to its customers.

Training will take place at the Company's sole location in Santa Clara.

## **PROJECT DETAILS**

This is the fifth ETP Agreement, the third in the last five years. This project has been rightsized in Job Number 1 based on prior earnings. Training in the last two ETP Agreements focused on supporting skill upgrades related to business operations and manufacturing skills, supporting the development and roll outs of earlier product lines and earlier new equipment.

Training in this proposal focuses on training JSR's staff on new equipment and new products serving the Company's continued expansion into Life Sciences markets. Specifically, products such as ion capacitors and battery binders are new emerging technologies that require new processes and upgraded skills training. JSR recently invested \$570,000 in equipment (including software) that are integral in new manufacturing processes for its new product lines such as lithography materials and Amsphera3 proteins, a chromatography resin used in therapeutic antibodies manufacturing.

Additionally, ISO certified companies have periodic audits and review findings to help determine staff's training needs. In this proposal, JSR is including ISO 9001 training to meet efficiency goals.

Lastly, JSR has expanded the number of fulltime employees by 22 staff members since the last Agreement and anticipates hiring an additional 8-25 people over 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 subject to a lower post-retention wage.

The Company will hire 8 new employees (Job Number 2). The date-of-hire for 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.

New employees will report to the Santa Clara facility where ample space is available to accommodate the new employees. Seven of the eight new staff from administrative, technical, production, supervisory/managerial occupations will attend safety training and receive OSHA 10/30 certifications. Due to the nature of the technical expertise and safety requirements new JSR staff are anticipated to need a higher weighted average number of hours of training

(estimated 158 hours). However, JSR training is not planned to exceed ETP's range cap of 200 hours.

## Training Plan

JSR will deliver Class/Lab, E-learning and Computer Based Training. JSR represents all training content is refreshed and none of the prior content is repeated to the same trainees, although some topics are similarly titled.

**Business Skills:** This training will be offered to all occupations. Cost of Quality training focuses on three elements; prevention, appraisal and quality failures. With the planned expansion into Life Sciences Business, JSR is pursuing reforms to increase efficiency. ISO9001 and ISO14001 management standards were recently updated to reflect the increased need for risk awareness and mitigation. To meet these updated requirements, JSR plans to launch a risk management system that will necessitate training for all occupations. This training is anticipated to results in a 4% reduction in project implementation time and lead to a decrease in errors.

**Commercial Skills:** This training will be offered to all occupations. The transition of the semiconductor industry to ever-smaller technology nodes has increased the quality requirements for the materials sourced by JSR. Better management of the raw material supply chain may result in a 2-3% improvement in raw materials supplies acquired by JSR and a 1-2% reduction in scrapped products and waste. The Environmental Health and Safety team will deliver training to all occupations on a variety of topics. This training will result in the integration of Environmental Health & Safety standards in all new product research and development processes. Production, Technical, Supervisors and Managers will receive training in Life Sciences Biomaterial Handling, Storage and Cleaning Practices. The training is anticipated to result in a 10-15% increase in efficiency in moving through the EPA approval processes for new product approval after applying the EPA's own standards to JSR's life sciences biomaterial handling, storage and cleaning processes.

**Computer Skills:** This training will be offered to all occupations. JSR Micro aims to manage its strategic growth into new markets in the Life Science sector in part by ensuring that it has the technological infrastructure in place to support and sustain growth. Many new software platforms are being introduced at JSR such as CONCUR, which centralizes and makes expense reporting efficient by automatically categorizing and mapping expenses based on receipt images; Data Visualization Software presents data to a targeted audience in order to enable them to gain insights most effectively; New System Administration software for managing configuration, and reliability of computer systems, such as user computers and servers; SAP HANA automates key business functions in financial, and operations such as sales/distribution, production planning, purchasing and warehousing; SAP New Module for Production will enhance and accelerate manufacturing operations including production planning and analysis.

**Continuous Improvement:** This training will be offered to all occupations. Topics such as Business writing, Presentation Skills, Decision Making will be offered to assist JSR to improve communication and build strong workplace teams. The goals include upgrading skills to assist employees in advancing on career ladders and remaining skilled in a fast paced technological environment where new products and tools are continuously being introduced or developed.

**Literacy Skills:** This training will be offered companywide. JSR is a subsidiary to JSR Corporation based in Japan. A number of Japanese staff with limited English proficiency work in Santa Clara. Thus, JSR has a need to offer Vocational English to improve workplace communications.

**Manufacturing Skills:** This training will be offered to all occupations. Topics such as Research and Development for New Product Technology are proposed. JSR is preparing new systems for managing orders and materials that staff across occupations will utilize. JSR is introducing New Equipment Training on production techniques for fabrication of the new products. As a result of the training the Company anticipates increasing sales over the next 24 months. Production, Technical occupations and Supervisor/Manager occupations will receive training in New Equipment Technology such as MPI Auto Labeler, Manual Filter, NFC Filter Leak Sensor System and upgrading skills to reprogram existing equipment. The Company anticipates a 2-3% decrease in operating costs and a 1-2% increase in productivity as a result of this training.

### **Certified Safety Training**

1. 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 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.
2. 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 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 unless they work full time onsite at the clean-up location.
3. Hazardous Materials (HAZMAT). This training is 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, company-wide 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.

### **Computer Based Training**

Computer Based Training will be provided for internally developed items that can be taken by employees at their own pace without instructors. Commercial Skills topics such as Inventory Cycle, Export Trade, Import trade, and Environmental Health and Safety are proposed.

### **Green/Clean Operations**

JSR employs “green technology” methods including environmental protection, energy generation and efficiency, distributed renewable energy, and other green business practices, processes, and products. JSR performs environmental and safety related evaluations during new product development, from research to end. Additionally the Company employs many strategies,

including the use of nanotechnology, to make conservation and waste reduction measures routine.

JSR has joined the Environmental Protection Agencies Onium Consortium, which supports research into sustainable photo acid generators. Additionally the Company enrolled in Silicon Valley's Clean energy program. As of 2017 JSR procures 50% of its electricity from renewable nonpolluting sources. In response to California's drought conditions, the Company has taken substantial measure to reduce water consumption. The Company reports a 1.6 million gallon reduction per year in contrast with water usage figures from five years ago.

## **Nanotechnology**

JSR uses nanotechnology to develop solutions for various industries including mobile device and medical equipment. Enhancements to more traditional semi-conductor or medical device manufacturing are being driven by consumer demands, innovation, and a broad marketplace shift to reduce the costs, size, and weight of products, and to maximize the ability to offer new products or services in order to adapt to market pressures. JSR reports these skills are being used in the development of new products.

## **Commitment to Training**

JSR uses training to express its on-going commitment to employee advancement and recognition in an effort to retain employees and equip them with skills to optimize service delivery and product development and improve customer satisfaction.

JSR's past training efforts included new hire orientation, regulatory training, on-the-job training, seminars and conferences, and basic computer skills (budget permitting).

ETP funds will not displace the existing financial commitment to training. The Company's training budget has increased from \$95,000 to \$200,000, an increase of over 100% from prior years. The Company will continue to provide safety training in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

The ETP project will be managed by two H.R. staff (Partner and Director). JSR has a dedicated internal training staff of eight in addition to targeting some CA based training vendors. JSR also has obtained a subcontracted consultant to assist with program administration.

## **Impact/Outcome**

Training will assist the company in meeting strategic goals including:

- Achieving an estimated 10-15% revenue increase meeting new business orders from life science customers.
- Improvement in quality controls and business improvement procedures which will contribute to saving time, error reductions and more revenue thru waste reduction and better management of raw materials.
- Alignment of business practices and improvement in innovation practices, especially in the integration of Environmental Health and Safety standards in all new products.
- An estimated 3% improvement in speed to delivery as a result of new processes and equipment.



- An estimated 10% efficiency increase in the EPA approval process for new product approvals by applying EPA's standards to biomaterial handling, storage and cleaning processes.
- Seven new certified safety staff (OSHA 10/30/Hazmat/Hazwoper) to improve the Company's readiness to respond to emergencies.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **PRIOR PROJECTS**

The following table summarizes Company's performance under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0364	Santa Clara	03/14/2016 - 03/13/2018	\$118,404	\$94,859 (*80%)
ET14-0256	Santa Clara	02/03/2014 - 02/02/2016	\$134,758	\$103,527 (*77%)

## **DEVELOPMENT SERVICES**

The Company retained Prospect Consulting Group in San Francisco to assist with development of this proposal for a flat fee of \$5,200.

## **ADMINISTRATIVE SERVICES**

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

## **TRAINING VENDORS**

Learnit, in San Francisco, has been retained to provide Continuous Improvement training for a fee of \$17,000.

Other trainers will be identified as they are retained.

## **Exhibit B: Menu Curriculum**

### **Class/Lab/E-Learning Hours**

8-200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- ✚ Cost of Quality Training
- ✚ Quality Systems to Manage Growth
- ✚ Business Writing

#### **COMMERCIAL SKILLS**

- ✚ Environmental Health and Safety Training
- ✚ Life Sciences Biomaterial Handling, Storage and Cleaning Practices (Safety Training)
- ✚ Raw Material Supply Chain Management
- ✚ Industry Import/Export Trade Updates

#### **COMPUTER SKILLS**

- ✚ New Technology for Growth
  - Advanced Simulation Software Training
  - CONCUR
  - Data Visualization Software
  - Label Software 2.0
  - Maintenance Connection
  - New System Administration
  - Replicon (Gen 3)
  - SAP HANA
  - SAP New Module for Production
  - StarLIMS
  - Upgrades to Halogen

#### **CONTINUOUS IMPROVEMENT**

- ✚ Professional Development
  - Develop Strategic Agility: Embrace Change & Drive Results
  - Influencing without Authority
  - Decision Making-
  - Move from an Operational Manager to a Strategic Thinker
  - Presentations Skills
  - Thrive in Chaos
  - Time Management
  - ISO9001

#### **MANUFACTURING SKILLS**

- ✚ Research and Development for New Product Technology
  - 3D printing
  - 5G materials
  - Advanced Lithography
  - Advanced mask technology
  - Antenna packaging
  - APP4 Technology

- Cleans Technology
- Electroplating
- Electronic Materials
- Ellipsometry Training
- EUV Stochastics R&D Studies
- Formulated Cleans Solutions
- Formulation Processes
- New Electronic Materials
- R&D Tools Training: XSEM
- Post Etch Cleans
- Thermal and Thick Carbon UL
- Tilted Ion Implantation Lithography
- ✚ New Equipment Technology
  - MPI Auto-Labeler
  - MT Systems Manual Filter
  - MT Systems NFC Filter
  - Therma Leak Sensor System

**LITERACY SKILLS** (Literacy Training cannot exceed 45% of total training hours per-trainee)

- ✚ Vocational English Language Skills

**OSHA 10/30**

- ✚ OSHA 10 (certified trainer)
- ✚ OSHA 30 (certified trainer)

**HAZWOPER**

- ✚ HAZWOPER Refresher 8 Hours
- ✚ HAZWOPER 24 hours
- ✚ HAZWOPER 40 hours

**HAZARDOUS MATERIALS**

- ✚ HAZARDOUS MATERIALS

**CBT Hours**

0 - 3

**COMMERCIAL SKILLS**

- ✚ Inventory Count Process 0.5
- ✚ Export trade Update 0.5
- ✚ Import Update 0.5
- ✚ EH&S Updates 0.75

Safety Training cannot exceed 10% of total training hours per-trainee (This cap does not apply to Hazmat, OSHA 10/30 or HAZWOPER)

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



**Training Proposal for:  
Modesto Area Sheet Metal Joint Apprenticeship  
Training Trust**

**Agreement Number: ET19-0934**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Jones

**PROJECT PROFILE**

Contract Attributes:	Retrainee Apprenticeship Veterans Priority Rate	Industry Sector(s):	Construction (C) Services (61,71,72,81,92)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Tuolumne, Stanislaus, Merced, Mariposa	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Sheet Metal Workers Local Union No. 104		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$91,770		\$6,371 8%		\$98,141

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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**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 Apprentice	Comm'l. Skills, Computer Skills, OSHA 10/30	20	8-210	0	\$4,267	\$22.77
				Weighted Avg: 190			
2	Retrainee Veteran Apprentice	Comm'l. Skills, Computer Skills, OSHA 10/30	3	8-210	0	\$4,267	\$22.77
				Weighted Avg: 190			

**Minimum Wage by County:** SET/Priority Industry: \$22.77 per hour  
**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 \$4.96 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Apprentice Sheet Metal Worker		20
<b>Job Number 2</b>		
Veteran Apprentice Sheet Metal Worker		3

**INTRODUCTION**

Founded in 1941 and headquartered in Sacramento, Modesto Area Sheet Metal Joint Apprenticeship Training Trust (Modesto Sheet Metal JATT) ([www.sheetmetaltraining.com](http://www.sheetmetaltraining.com)) provides training for Apprentices in the sheet metal, HVAC, and testing and air balance industries. Trainees are represented under collective bargaining between representatives from Local 104. The Modesto Sheet Metal JATT delivers training in Tuolumne, Stanislaus, Merced and Mariposa counties. Training under this proposal will be for Apprentices and Veteran Apprentices. This is Modesto Sheet Metal JATT first ETP Agreement.

Apprentices in this trade are trained in fabrication, design, installation of ductwork and equipment, service and repair of all types of heating, air-conditioning, and refrigeration equipment. Trainees are also offered welding certification in all areas. Training will consist of hands-on instruction and lecture.

**Veterans Program**

Modesto Sheet Metal JATT actively recruits and has a hiring preference for Veterans. The Veteran training curriculum will be the same as Apprentice training outlined below. These trainees are in

a separate Job Number to better track performance toward the goal of improved outreach for Veterans.

The Modesto Sheet Metal JATT is part of the National Helmets to Hard Hats initiative. All Veterans referrals from National Helmets to Hard Hats are automatically moved to the top of their Qualified Applicants list. The JATT also attends job fairs specifically targeting Veterans.

## **PROJECT DETAILS**

ETP funding will allow employers to handle the growing volume of work in Tuolumne, Stanislaus, Merced and Mariposa counties by providing Sheet Metal workers with skills to meet demand and industry changes.

New construction requiring sheet metal fabrication and demand for long-term servicing of industrial HVAC systems continues to grow. Training will ensure employers can meet the demands of their customers. Sample construction projects during the Contract term includes: The UC Merced Project, The San Francisco Ferry Expansion, and the Nestle Water Bottling Project.

Trainees will receive certification in Forklift operation to ensure safe practices. Once Apprentices complete The Modesto Sheet Metal JATT curriculum designed by the LEA, Apprentices will become certified with American River College. The certification verifies the Apprentices have received recognition as Journeymen at the State and National level.

### **Apprenticeship Program**

The Panel funds 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 supplements cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the program is five years.

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 \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

### **Training Plan**

**Commercial Skills:** Training will be offered to all occupations in Advanced Triangulation, Layout and Fabrication of Complex Fittings, Study of Psychometrics, Electricity and HVAC Systems, Architectural Sheet Metal and Duct Leakage Testing.

**Computer Skills:** Training will be offered to all occupations in Building Information Modeling.

### **Certified Safety Training**

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. 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.

### **Commitment to 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

The Apprenticeship Director and Administrative Assistant will oversee and administer the ETP project. A Training Coordinator will schedule training and in-house experts will provide all training. The Apprenticeship Director will report project performance to the governing board on a monthly basis.

### **Training Coordinator and Trainer Qualifications**

All trainers receive instructor training through international training organizations and are approved by American River College. Modesto Sheet Metal JATT has four staff members facilitating the project and two staff members dedicated to marketing, recruitment, needs assessments and scheduling training.

### **Impact/Outcome**

Certification for Apprentice training include OSHA10/30, Forklift: Warehouse, Rough Terrain Operation and Aerial, EPA Section 608 Certification Section I and II, and State and National Journeyman statues and certification from American River Community College.

### **Marketing and Support Costs**

Marketing is done through Modesto Sheet Metal JATT's website, direct mailings, brochures/flyers, personal contacts, telephone calls, public service announcements and e-mail announcements. All current participating employers are signatory to Local 104. The JATT also promotes this training program at labor-management meetings and industry assemblies.

Modesto Sheet Metal JATT is requesting 8% support costs to assist staff in training liaison with qualifying signatory employers. Recruitment and assessment activities for Apprentices will also be supported. Staff recommends 8% support costs.

### **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.

### **DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

N/A



**Exhibit B: Menu Curriculum****Class/Lab Hours**

8-210

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- Advanced Blueprint Reading
- Advanced Drafting Skills
  - Isometric
  - Oblique
  - Perspectives
- Advanced Triangulation, Layout and Fabrication of Complex Fittings
- Air and Its Properties
- Air and Water Cooled Condensers
- Architectural Sheet Metal
- Basic Electrical Theory and Fundamentals
- Bio Cabinet Safety/Testing
- Building HVAC Control Theory and Application
- Building Pressurization Analysis
- Calculating Equipment Cooling Capacities and Enthalpy of Air
- Calculating System Design and Operation
  - Design
  - Fabricate
  - Test Lab Duct Systems
- Central HVAC System Design
- Chilled Water Systems
- Complete Building Takeoff for Sheet Metal
- Confined Space Training
- Constant Volume Air Conditioning
- Control System Fundamentals
- DCC Controls and Systems
- Demand Control Ventilation
- Design, Fabrication and Installation of Duct Systems
- Duct Design and Airflow Calculations
- Duct Elevation Drawings
- Duct Leakage Testing
- Electric/Electronic Control Systems
- Electric Motors and Controls
- Electrical Components
- Electrical Panel Safety
- Electricity and HVAC Systems
- Energy Audit
- Environmental Building Science
- Exhaust Hood and System Fabrication and Installation
- Field Measuring
- Fire Life Safety
- Fire and Smoke Dampers
- Food Service Stainless Fabrication and Sanitary Code Requirements
- Forman's Problems (Troubleshooting)
- Fume Hood Testing Fundamentals

- Gas Heating Systems
- GREEN/LEED Awareness
- Heat Load Calculations
- Heat Pump Components and Operation
- High and Low Voltage Applications
- Hoisting and Rigging
- HVAC Blueprint Takeoff for Bidding
- HVAC Detail Drawings
- HVAC Fan Laws and Principles
- Indoor Air Quality Procedures
- Industrial Specifications and Details
- Installation of Prefabricated Building Panels and Architectural Elements
- Introduction to Commercial Refrigeration
- Introduction to HVAC Equipment
- Layout and Fabrication of Fittings Using Drafting Skills
- LEAN Construction
- Local Codes and Standards
- Manometer, Pitot Tube and Tachometer Usage
- Multi Zone HVAC
- OSHA Regulations
- Pneumatic Controls Systems
- Positive/Negative Pressure Blow Pipe Construction
- Refrigerant Safety
- Refrigerant Control Devices and Troubleshooting
- Rooftop Architectural Steel
- Rooftop Steel Construction
- SMACNA Standards for Duct Construction
- SMACNA TABB Procedural Guide
- Sound and Vibration Principles/Testing
- Standing Seam Roofs
- Study of Psychometrics
- TABB Supervisor Training
- TABB Technician Certification
- Testing, Adjusting and Balancing System
- Trigonometry For the Sheet Metal Industry
- Troubleshooting HVAC Equipment
- Understanding Blueprints and Job Specifications
- Variable Air Volume Systems
- Welding Safety
- Welding Skills (Mig, Trig, ARC)
- Wiring Circuits and Schematics
- Zone Control Systems

### **COMPUTER SKILLS**

- Building Information Modeling

### **OSHA 10/30** (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

Safety Training cannot exceed 10% of total training hours per-trainee.  
(This cap does not apply to OSHA 10/30)

Note: Reimbursement for retraining is capped at 210 total training hours per trainee, regardless of the method of delivery.



**Training Proposal for:  
National Veterans Transition Services, Inc.**

**Contract Number: ET19-0367**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** V. Awad

**PROJECT PROFILE**

Contract Attributes:	New Hire Veterans	Industry Sector(s):	MEC (H) Services (61,71,72,81,92) Manufacturing (33) Information / Multi Media (51)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	N/A		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$62,400		\$9,984 20%		\$72,384

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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**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, Conitnuous Impr, Manufacturing Skills	24	8-200	0	\$3,016	*\$13.66
				Weighted Avg: 100			

\*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:** \$13.66 in San Bernardino, Riverside, and Ventura Counties; \$14.19 for San Diego County; \$14.62 for Los Angeles County; and \$14.58 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		2
Information Technology Staff		5
Manager/Supervisor		2
Production Staff		9
Technical Support Staff		6

**INTRODUCTION**

Founded in 2010, National Veterans Transition Service, Inc. (NVTI) (<http://www.nvti.org/>) is a San Diego-based non-profit organization dedicated to assisting veterans in adjusting to civilian life and securing meaningful employment. NVTI assists veterans in many facets of life including: employment, career, education, living situation, personal effectiveness/well-being, and community-life functioning. NVTI is eligible for ETP funding as a Workforce Investment Act Funding recipient. This will be NVTI's second ETP contract within the last five years.

NVTI has developed a comprehensive military-to-civilian transition program named REBOOT. The program is designed to address the personal and social aspects of transitioning to civilian life. REBOOT builds upon a service member's military training and skills to help redefine personal identity, purpose in life, and desired occupation. This program is designed to help bridge the gap between military and civilian worlds. NVTI serves both active duty individuals as well as veterans.

NVTI'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. No funds will be duplicated

under this proposal. Additionally, the organization implemented a social enterprise model in which it recruits businesses who pay membership fees and in return are provided workforce development services by NVTSI.

### **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 that employers have a need to hire Project Management Professionals, Certified Associates in Project Management, and CNC production workers. Additionally, NVTSI conducted a survey of local employers and 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.

### **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.

### **PROJECT DETAILS**

The ETP proposal will fund veteran trainees who have been discharged from military service. NVTSI has committed to train 24 unemployed veterans who have been discharged from military service. NVTSI plans to place these trainees in employment as Administrative Staff, IT Staff, Managers/Supervisors, Production Staff, and Technical Support Staff across Southern California.

### **Curriculum Development**

NVTSI delivers numerous training sessions each year. Employer and trainee feedback is obtained on a regular basis after training and placement with employers. Trainees submit course evaluations and employers provide feedback. NVTSI uses the information to understand what changes need to be made to the program and curriculum for long term success in transitioning Veterans to the civilian workforce.

## Training Plan

Newly Hired Veteran trainees will receive up to 100 hours of training:

**Business Skills** – 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** – Training will be offered to all trainees in vocational computer skills. Computer skills. Classes offered will include Hardware and Security, Outlook and Internal Customer Applications, Microsoft Office and Project Management Fundamentals and Essentials.

**Continuous Improvement** – 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.

**Manufacturing Skills** – Training will be offered to Production Staff and delivered by Quality Controlled Manufacturing, Inc at their facility. Trainees will receive training on CNC Machine Operation, Manufacturing Processes, Project Flow, Reading Blueprints, Standard Operating Procedures, and Statistical Process Control.

## 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 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

In addition to the ETP funded curriculum NVTSI provides coaching 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.

The organization works with agencies and employers across San Diego County as well as its member employers to assist trainees in finding employment. The Staff conducts face-to-face visits, identify client goals, design improvement projects, and determine how hiring veterans will help meet the company's objectives.

## 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. Training instructors for Titanium Cobra Solutions, Inc. and Quality Controlled Manufacturing, Inc. are subject matter experts 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 training vendors to schedule and collect ETP rosters for training delivered at the vendor's location.

### **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.

### **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 each other and learn best. The trainer-to-trainee ratio will not exceed 1:20.

To ensure the training model meets trainee needs, trainees complete a pre- and post-program survey to determine if their needs were met while in the program. NVTSI requests that each trainee complete a course critique after each module of training to ensure that both instructors and the class sizes are meeting student needs. ETP Staff recommends the waiver to increase the trainer-to-trainee ratio to 1:20.

### **RECOMMENDATION**

Staff recommends approval of this proposal.



## **PRIOR PROJECTS**

The following table summarizes NVTSI's performance under an ETP Contract that was completed within the last five years:

Contract No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0178	San Diego	9/1/16 - 8/31/18	\$164,604	\$72,211 (44%)

During the project, NVTSI enrolled 166 trainees with 154 trainees receiving more than 8 class hours for a total of 9,552 class hours. The total delivered training hours could have potentially earned 100% of the amount approved. However, only 26 trainees were placed.

NVTSI targeted long term unemployed Veterans who were on different types of public assistance, some who used participation in ETP training as proof that they were job hunting. Although jobs were offered, trainees declined to accept jobs. In addition, NVTSI targeted active duty personnel who were due to separate from service in 90 days. Ninety days proved to be too short a period in which to engage the potential trainee to discuss training and job opportunities after separation. Prior to engaging with NVTSI, many of these service members had already made decisions regarding their civilian transition. To address these concerns and ensure the current proposal is successful, NVTSI has changed how they work with unemployed Veterans, including a more in-depth evaluation process. NVTSI is engaging with active duty personnel nine months prior to separation from military service to discuss training, employment, and career opportunities. NVTSI believes earlier engagement with these trainees will result in their using NVTSI services and accepting a job after separation and training.

This proposal has been right-sized to the earned amount of the prior project (ET17-0178).

## **DEVELOPMENT SERVICES**

NVTSI retained National Training Company Inc. in Irvine to assist with development of this proposal for a flat fee of \$4,500.

## **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**

- Titanium Cobra Solutions, Inc. of San Diego has been retained to provide training for Business Skills for a fee of \$15,000.
- Quality Controlled Manufacturing, Inc. of Santee has been retained to provide Manufacturing Skills for a fee of 20,000.
- 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

**MANUFACTURING SKILLS**

- CNC Machine Operation
- Manufacturing Processes
- Project Flow
- Reading Blueprints
- Standard Operating Procedures
- Statistical process Control

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



**Training Proposal for:**

**NuVasive, Inc.**

**Agreement Number: ET19-0319**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Services (G) Biotechnology and Life Sciences (54+)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego and Orange	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 711	U.S.: 2,087	Worldwide: 2,500
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	10%		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$343,575

<b>Total ETP Funding</b>
\$195,000

**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, Continuous Improvement, Manufacturing Skills	375	8 - 200	0 - 10	\$520	\$17.03
				Weighted Avg: 20			

**Minimum Wage by County:** \$17.03 per hour for San Diego County and \$17.50 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

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
Corporate Support/Operations Staff		100
Information Technology/Engineering Staff		112
Quality Assurance/Quality Control		28
Marketing/Sales Staff		62
Product Development/Manufacturing Staff		37
Manager		36

**INTRODUCTION**

Founded in 1997 and headquartered in San Diego, NuVasive, Inc. (NuVasive) ([www.nuvasive.com](http://www.nuvasive.com)) is a medical device company specializing in medical procedure products for the spine. The Company develops minimally-disruptive surgical products and procedurally-integrated solutions for the spine. NuVasive offers two product lines: 1) spinal surgery products, and 2) biologics.

The Company's spinal surgery product line includes thoracolumbar, cervical, and Intra-Operative Monitoring (IOM) services and disposable product offerings, which are used to enable access to the spine and to perform minimally disruptive restorative and fusion procedures. The Company's biologics product line includes allograft (donated human tissue), FormaGraft (a collagen synthetic product), Osteocel Plus and Osteocel Pro (each a tissue graft cellular matrix containing stem cells (MSCs), and AttraX (a synthetic bone graft material), all of which are used to aid the spinal fusion or bone healing process. The Company offers its products to hospitals and surgery centers worldwide.

NuVasive maintains locations in Michigan, Maryland, Tennessee, Ohio, the Netherlands, Australia, Brazil, Germany, Italy, Japan, and the United Kingdom. The Company has a closely-related affiliated entity, Ellipse Technologies, Inc. dba NuVasive Specialized Orthopedics (NSO), a division of NuVasive focused on the design and innovation of minimally disruptive orthopedic solutions, including its proprietary platform of magnetically adjustable implant systems.

Training in this proposal will target workers at NuVasive's headquarters in San Diego and NSO facility in Aliso Viejo.

### **Veteran Program**

NuVasive currently employs 96 active Veterans, 25 in California. The Company has several Veteran outreach programs including hosting resume and mock interview workshops and career fairs for Veterans. NuVasive also plans to launch a #VetsinSpine blog in November 2018 to highlight its Veteran employees and their journey towards the medical device industry, as well as to serve as a resource for advice to other Veterans.

Although NuVasive supports and hires Veterans, does not have a separate Veteran component.

### **PROJECT DETAILS**

Training in this proposal is driven by two significant changes occurring within the Company:

1. **Growth.** Company representatives report that NuVasive began as a local medical technology company for minimally invasive, lateral spine surgery. Today, the Company ranks third in the global spine market and surpassed the \$1B revenue mark at the end of 2017.

To support growth, NuVasive plans to renovate and expand its headquarters in San Diego, adding 100,000 square-feet of space to house the Company's Innovation Center of Excellence, showcasing the Company's product and procedural offerings and highlighting its surgeon education. Other features will include: an expanded surgeon education laboratory for onsite surgeon training and education; a prototype design facility with 3D printing capabilities; and state-of-the-art biomedical testing center. Construction is ongoing and is expected to be completed in 2019.

To further support growth, the Company anticipates adding approximately 250 new employees by 2019. Upon completion of the aforementioned new building, the San Diego headquarters will have a total of 250,000 square-foot facility and will house approximately 850 employees. Although NuVasive is committed to creating jobs, this project does not include a Job Creation component.

2. **New products and new partnerships:** NuVasive plans to continue development on a wide variety of projects intended to broaden surgical applications for greater procedural integration of its Maximum Access Surgery techniques and additional applications of the Magnetic Expansion Control (MAGEC) spinal bracing system technology. The Company also expects to continue expanding its other products and services offerings as it executes its strategy to offer customers an end-to-end, procedurally integrate solution for spine surgery, as well as continue pursuing business and technology acquisition and partnerships.

NuVasive recently received clearance from the US Food and Drug Administration (FDA) for, and launched the following new products:

- Surgical automation platform called Pulse™;
- XLIF® Lordotic Expandable (XLX) Interbody System; and
- Procedural solution within the MAGEC product family that addresses Early Onset Scoliosis (EOS) called MAGEC X.

Coupled with its commitment to developing and implementing new products, NuVasive and Siemens Healthineers recently announced a strategic partnership focused on technology development, marketing, and commercial activities to advance clinical outcomes in minimally invasive spine surgery.

Consequently, NuVasive is committed to expanding its training program to support changes within the Organization and enable the Company to continue to innovate and compete. The proposed training plan will focus on providing extensive, critical new skills to its incumbent and newly-hired employees to enable them to work efficiently to design, develop, launch, sell, and support its new and updated product offerings.

ETP funding will allow NuVasive to implement new and updated curriculum related to the aforementioned new products, processes, and systems. Funding will also assist the Company to supplement its training initiatives to successfully expand into new markets to continue to grow and excel in the advanced medical device manufacturing industry.

## Training Plan

Training will be provided to approximately 375 workers at the Company's San Diego headquarters and NSO's Aliso Viejo facility. Training will be delivered via class/lab, E-Learning, and Computer-Based Training (CBT) methodologies in the following:

**Business Skills** – Trainees across all occupations will receive supplemental business skills training. Training topics include Audit/Documentation Skills, Business Acumen, Business Process Skills, Communication Skills, Customer Support, Finance/Accounting Skills, Marketing and Sales Skills, New and Revised Standard Operating Procedures (SOP), Reporting/Documentation Skills, Risk Assessment/Risk Management, Train-the-Trainer, and Understanding Patent Law.

**Computer Skills** – All occupations may receive training on systems and computer applications that are applicable to their job role and responsibilities. Training topics include Cybersecurity Procedures, Data Analytics/Database Systems, Intermediate/Advanced Microsoft Office, Lab Systems, Salesforce System, and System Applications Products (SAP).

**Continuous Improvement** – Training will be delivered to all occupations. Training topics include 5S/Lean Six Sigma/Design for Six Sigma, Change Management, Coaching/Feedback, Decision Making, Delegation Skills, Goal Setting, International Organization for Standardization (ISO) Skills, Leadership Skills, Problem Solving Skills, Process Improvement/Management Skills, Product Quality Planning/Product Liability, Project/Program Management, Quality Assurance/Quality Control, Quality System Processes, Strategic Thinking, Team Building, Time Management, and Troubleshooting/Root Cause Analysis.

**Manufacturing Skills** – Training will be delivered to Product Development/Manufacturing Staff. Training topics include 2D/3D Drawing/Modeling, Change Control, Clinical Development Skills, Equipment Skills, Good Documentation Practices, Inspection Skills, Laboratory Skills, New/Updated Processes/Systems/Products, Product Commercialization Skills, Product

Lifecycle/Product Training, Quality Assurance/Quality Control, Radiology Process Skills, Research and Development Skills, Welding/Milling Skills, and Work Process Skills.

### **Computer-Based Training (CBT)**

To support Class/Lab training, NuVasive will also provide up to 10 hours of Manufacturing Skills delivered via CBT. 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.

### **Commitment to 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.

The Company's 2019 training budget for San Diego and Aliso Viejo facilities is approximately \$2.2M. NuVasive currently provides new employee orientation, basic OSHA, job skills, workplace ethics, diversity, and anti-harassment training. The Company also provides training to its executive leadership.

#### ➤ Training Infrastructure

NuVasive will contract with TFP to assist with ETP project administration. The Company's Talent and Human Resources Leader in Talent Management has overall responsibility of the project. NuVasive designated an Organizational Effectiveness and Learning Manager in San Diego as well as a Senior Business Analyst and a Senior Human Resources Manager in Aliso Viejo to assist with the coordination of training and LMS documentation including scheduling, documenting, and managing training. The Organizational Effectiveness and Learning Manager will also meet with ETP staff and work with NuVasive's third-party administrator.

Training will be delivered by in-house instructors, and vendors as needed. ETP training will start upon contract approval.

### **Temporary to Permanent Hiring**

NuVasive will train approximately 20 workers 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 135 days. Workers will receive employer-paid share-of-cost for healthcare premiums the first of the month following their hire into full-time permanent employment.

Trainees must be eligible to participate in ETP-funded. Trainees cannot be enrolled until after they have been hired by the Company into full-time, permanent employment. Until they are hired, retention and post-retention wage requirements cannot be met, and the Company will not receive progress payments.

### **Electronic Recordkeeping**

NuVasive reports that it currently uses a Learning Management System (LMS) to schedule training and track training attendance. This system has been reviewed and approved by ETP staff.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

NuVasive retained Training Funding Partners (TFP) in Fountain Valley to assist with development of this proposal for a flat fee of \$9,750.

## **ADMINISTRATIVE SERVICES**

TFP will also perform administrative services in connection with this proposal for a fee not to exceed 12% of payment earned.

## **TRAINING VENDORS**

To Be Determined



**Exhibit B: Menu Curriculum****Class/Lab and E-Learning Hours**

8 – 200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Audit/Documentation Skills
- Business Acumen
- Business Process Skills
- Communication Skills
- Customer Support
- Finance/Accounting Skills
- Marketing and Sales/Skills
- New and Revised Standard Operating Procedures (SOP)
- Reporting/Documentation Skills
- Risk Assessment/Risk Management
- Train-the-Trainer
- Understanding Patent Law

**COMPUTER SKILLS**

- Cybersecurity Procedures
- Data Analytics/Database Systems
- Intermediate/Advanced Microsoft Office
- Lab Systems
- Salesforce System
- System Applications Products (SAP)

**CONTINUOUS IMPROVEMENT**

- 5S/Lean Six Sigma/Design for Six Sigma
- Change Management
- Coaching/Feedback
- Decision Making
- Delegation Skills
- Goal Setting
- International Organization for Standardization (ISO) Skills
- Leadership Skills
- Problem Solving Skills
- Process Improvement/Management Skills
- Product Quality Planning/Product Liability
- Project/Program Management
- Quality Assurance/Quality Control
- Quality System Processes
- Strategic Thinking
- Team Building
- Time Management
- Troubleshooting/Root Cause Analysis

**MANUFACTURING SKILLS**

- 2D/3D Drawing/Modeling
- Change Control
- Clinical Development Skills
- Equipment Skills
- Good Documentation Practices
- Inspection Skills
- Laboratory Skills
- New/Updated Processes/Systems/Products
- Product Commercialization Skills
- Product Lifecycle/Product Training
- Quality Assurance/Quality Control
- Radiology Process Skills
- Research and Development Skills
- Welding/Milling Skills
- Work Process Skills

**CBT Hours**

0 – 10

**MANUFACTURING SKILLS**

- Masters of Spine: Chapter 1 - Spinal Anatomy and Pathology (1.5 hours)
- Masters of Spine: Chapter 2 - Anterior Procedures (1.5 hours)
- Masters of Spine: Chapter 3 - Posterior Procedures (1.5 hours)
- Masters of Spine: Chapter 4 - Neuroanatomy and Associated Products (1.5 hours)
- Masters of Spine: Chapter 5 - Product Life Cycle: From Idea to Reality (1.5 hours)

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:**

**O'Brien Steel Erectors, Inc.**

**Agreement Number: ET19-0320**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** A. Townsend

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative SET HUA	Industry Sector(s):	Construction (C) Services (61,71,72,81,92)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Joaquin, Fresno	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Operating Engineers Local Union No. 3; Bridge, Structural, Ornamental and Reinforcing Iron Workers Local 118		
Number of Employees in:	CA: 107	U.S.:120	Worldwide: 120
<u>Turnover Rate:</u>	9%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
\$266,700

<b>Total ETP Funding</b>
\$106,080

**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 HUA	Business Skills, Commercial Skills, Computer Skills, HazMat, OSHA 10/30, PL-Comm Skills	63	8-200	0	\$1,560	*\$12.53
				Weighted Avg: 60			
2	Retrainee Priority Rate Job Creation Initiative SET HUA	Business Skills, Commercial Skills, Computer Skills, HazMat, OSHA 10/30, PL-Comm Skills	5	8-200	0	\$1,560	*\$11.00
				Weighted Avg: 60			

\*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:** Priority/SET/HUA: Job Number 1: \$12.53 per hour in San Joaquin and Fresno County; Job Number 2 (Job Creation): \$11.00 per hour in San Joaquin 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
<b>Job Number 1</b>		
Administrative Staff		5
Estimators		3
Engineers		2
Production Staff		50
Project Managers		3
<b>Job Number 2</b>		
Administrative Staff		1
Engineers		1
Estimators		1
Production Staff		1
Project Managers		1

## **INTRODUCTION**

Founded in 1950 and headquartered in Stockton, O'Brien Steel Erectors, Inc. ([www.obrienerectors.com](http://www.obrienerectors.com)) (O'Brien Erectors) specializes in structural steel building erection for general contractors working on large public and private building construction projects. The Company's portfolio includes commercial office buildings, schools, health care buildings, parking structures, water treatment plants, and prisons. The Company's two facilities in San Joaquin and Fresno Counties will participate in ETP-funded training. This will be the Company's first ETP Agreement.

### **Veterans Program**

O'Brien Erectors has Veteran employees and actively works with organizations and placement firms that seek to match Veterans with its employment opportunities.

### **Need For Training**

Recently, construction and commercial development has seen a resurgence in the Valley. With that, O'Brien Erectors has seen an increased demand for services. Additionally, the Company is offering new services, such as cable rail installation, that complement current services. To meet these demands, training will focus on new services and efficient tool and equipment operations to increase productivity, efficiency, and technical expertise of staff. Trainees will also receive courses in project management, cost control, planning, and communication to assist with customer service.

Additionally, the Company has invested in new equipment - Sage Construction software, AutoCad, tablets, trucks, and fall protection equipment. The most significant and main focus of equipment training is Sage Construction software which allows users to create reports and review building plans, drawings, and photographs, all in real-time. Training in new equipment will allow the Company to meet customer requirements.

O'Brien Erectors is also committed to creating a positive working environment to encourage retention and promotion. Training in soft skills, including problem solving, decision making, and communication skills, will give trainees transferable skills to grow within the organization.

### **Retrainee – Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly hired employees will be subject to a lower post retention wage.

O'Brien Erectors has grown 50% over the last few years and anticipates an additional 25% growth over the next two years. In addition, the Company's new services has generated more projects requiring additional staff. Due to growth and new equipment, the Company will hire five trainees (Job Number 2). The date-of-hire for 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.

## **PROJECT DETAILS**

### **Training Plan**

Training will consist of classroom and structured Productive Lab (PL) training to improving staff skills.

**Business Skills:** Training will be delivered to all occupations and focus on Problem Solving/Decision Making, Business Development, Communication Skills, Business/Financial

Reporting, and Project Management. Training will allow staff to better communicate with clients and improve workload management.

**Commercial Skills:** Training will be delivered to Production Staff and Project Managers. Topics include Blueprint Reading, Cable Rail Installation, Equipment Operation, Fall Protection, Forklift, Lanyard, Manlift, and Tool Operation. Trainees will increase trade skills.

**Computer Skills:** Training will be delivered to all occupations. Courses include AutoCad, iAuditor, Intermediate/Advanced Office 365, and Sage for Construction. Training will allow staff to navigate software and become more efficient.

### **Certified Safety Training**

1. 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 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.
2. Hazardous Materials (HAZMAT). This training is 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, Administrative Staff, Production Staff, Engineers, Estimators, and Project Managers 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.

### **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.

Training will be delivered to Production Staff. O'Brien Erectors will provide approximately 30 hours of Commercial Skills training in PL at a 1:3 trainer-to-trainee ratio. The higher ratio is required because the job requires a three-person team and the size of materials and equipment requires multiple persons to carry.

Trainers will explain and demonstrate step-by-step instructions and observe trainees performing these tasks. Training will consist of courses in Blueprint Reading, Cable Rail Installation, Equipment, Fall Protection, Forklift, Lanyard, Manlift, and Tool Operation. Production will be slowed and more materials will be wasted during PL.

### **Union Letters**

Two local unions represent the Engineers and Production Staff: Operating Engineers Local Union No. 3 and Bridge, Structural, Ornamental and Reinforcing Iron Workers Local 118. Support letters have been submitted for the training of represented employees.

## **Special Employment Training**

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

## **High Unemployment Area**

All trainees work in San Joaquin and Fresno Counties, High Unemployment Areas (HUA) with unemployment exceeding the state average by at least 25%.

### ➤ Wage and Retention Modifications

These trainees qualify for the ETP Reduced Standard Wage rather than the Priority Statewide Average Hourly Wage. O'Brien Erectors requests a wage modification for these trainees (from \$22.77/hr to \$12.53/hr for Job number 1 and from \$13.66/hr to \$11.00/hr for Job number 2).

## **Commitment to Training**

O'Brien Erectors allocate approximately \$100,000 annually for training that includes safety training, staff development, and new-hire orientation.

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

O'Brien Erectors has a detailed training plan in place and is ready to begin training upon approval. The Owner and two Office Administrators will oversee administration. In-house subject-matter experts and vendors (to be determined later) will deliver training. In addition, the Company has retained Propel Consulting Group to assist with administrative services.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

Propel Consulting Group in El Dorado Hills assisted with development of this proposal for a flat fee of \$13,000.

## **ADMINISTRATIVE SERVICES**

Propel Consulting Group in El Dorado Hills 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**

- Business Development
- Business Reporting
- Communication Skills
- Cost Control
- Customer Service
- Financial Reporting
- Planning
- Problem Solving & Decision Making
- Project Management

**COMMERCIAL SKILLS**

- Blueprint Reading
- Cable Rail Installation
- Equipment Operation
- Fall Protection
- Forklift Operation
- Lanyard Operation
- Manlift Operation
- Tool Operation

**COMPUTER SKILLS**

- Auto CAD
- Auditor
- Intermediate/Advanced Office 365
- Sage for construction

**HAZARDOUS MATERIALS**

- Chemicals Cleaning/Handling
- Materials Cleaning/Handling
- Waste Clean-up

**OSHA 10/30 (Certified OSHA Instructor)**

- OSHA 10
- OSHA 30

**PL Hours**  
0-30

**COMMERCIAL SKILLS (limited ratio 1:3)**

- Blueprint Reading
- Cable Rail Installation
- Equipment Operation
- Fall Protection
- Forklift Operation
- Lanyard Operation
- Manlift Operation
- Tool Operation

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

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





# OPERATING ENGINEERS LOCAL UNION No. 3

1620 SOUTH LOOP ROAD, ALAMEDA, CA 94502 • (510) 748-7400 • FAX (510) 748-7412  
Jurisdiction: Northern California, Northern Nevada, Utah, Hawaii, and the Mid-Pacific Islands

Business Manager Russell E. Burns

October 9, 2018

Employment Training Panel  
1100 J Street Suite 400  
Sacramento, CA 95814

Re: ETP Training Program

Dear Sir or Madam:

I am the Business Manager of the International Union of Operating Engineers, Local 3 ("OE3"). OE3 represents 37,000 members, many of them living and working in Northern California.

OE3 is an ardent supporter of employee training and we recognize the importance and crucial role the ETP Program plays in the development of our members.

Because O'Brien Steel Erectors makes safety training a top priority and shares our industry's concerns of maintaining a skilled and trained workforce, I unequivocally recommend that ETP award grant money to this contractor.

Should you have any questions, please call me at (510) 748-7400.

Thank you for your time and consideration.

Sincerely,

Russell E. Burns  
Business Manager  
IUOE General Vice President

REB: jrs - oe3/afl-cio

International Association of  
Bridge, Structural, Ornamental and Reinforcing Iron Workers  
Local 118

KARL PINEO, Business Manager, Financial Secretary-Treasurer  
2840 El Centro Road, Suite 118, Sacramento, CA 95833  
Phone (916) 646-6976 Fax (916) 646-1073  
iw118

October 4, 2018

Employment Training Panel  
5353 Mission Center Dr., Ste 110  
San Diego, CA 92181

Re: O'Brien Steel Erectors, Inc. ETP Training Program

Dear Sir or Madam:

I am the Business Manager /F.S.-T for Iron Workers Local Union 118. O'Brien Steel Erectors, Inc. employs many members from our Union.

The Ironworkers are ardent supporters of employee training and recognize the importance and crucial role that the ETP Training Program plays in the development of our members.

We support O'Brien Steel Erectors, Inc. in their efforts to secure funding for this training. Specifically, the training done with our members who are full-time Ironworkers which provides them with the knowledge and skills necessary to compete in this very difficult and competitive business environment.

Should you have any questions, please call me at (916)646-6976 ext 225.

Sincerely,



Karl Pineo  
Business Manager/F.S.-T  
Iron Workers Local 118



**Training Proposal for:**

**POM Wonderful Holdings LLC dba POM Wonderful LLC**

**Agreement Number: ET19-0334**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee HUA	Industry Sector(s):	Manufacturing (E)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno, Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 330	U.S. :8,500	Worldwide: 9,000
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	12%		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
\$210,300

<b>Total ETP Funding</b>
\$197,730

**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., HazMat, Mfg. Skills, PL-Mfg. Skills	5	8-200	0	\$1,014	\$17.54
				Weighted Avg: 39			
2	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills	190	8-200	0	\$1,014	\$12.53*
				Weighted Avg: 39			

\*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 Number 1: \$17.54 per hour for Los Angeles County  
 Job Number 2 (HUA): \$12.53 per hour for Fresno 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 \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 1; and up to \$1.53 per hour for Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff		1
Managers/Supervisors		3
Support Staff		1
<b>Job Number 2</b>		
Administrative Staff		28
Customer Service Staff		10
Engineers		12
Managers/Supervisors		20
Production Staff		110
Support Staff		10

## **INTRODUCTION**

Founded in 2000 and headquartered in Los Angeles, POM Wonderful Holdings LLC dba POM Wonderful LLC (POM) ([www.pomwonderful.com](http://www.pomwonderful.com)) is a wholly-owned subsidiary of The Wonderful Company LLC. POM is a food and beverage manufacturer (its products are sold worldwide) that produces a line of natural 100% pomegranate juices available in its iconic “double bubble” bottle. Brand names include POMx, LITE POM, and POMx Tea. POM has two locations, Los Angeles and Fresno. Both facilities will participate in training.

### **Veterans Program**

POM currently participates in job fairs directly related to Veterans and tracks the number of Veterans they employ.

## **PROJECT DETAILS**

This is POM’s third ETP Contract, and the third in the past five years. Previous training focused on Phase I of its newly implemented LEAN training system interface, Wonderful Improvement Network (WIN), for administrative support and company operations. In this proposal, training will focus on production functions, operating efficiencies, and meeting increased customer demands. Trainees will learn to operate equipment more efficiently, resulting in higher manufacturing efficiency and reduced operating costs.

Training will also include communication, leadership skills, business processes and forklift training. There will be no duplication of training for trainees who participated in the prior contract.

### **Training Plan**

Training will be delivered via Classroom/Laboratory, E-Learning and Productive Lab (PL) in the following:

**Business Skills:** Training will be offered to all occupations to effectively maintain business operations. Training topics include Accounting, Communication and Goal Setting.

**Computer Skills:** Training will be offered to all occupations to improve software skills. Training topics include Cyber Security.

**Continuous Improvement:** Training will be offered to all occupations and focus on eliminating waste and improving processes. Training topics include Critical Thinking, Kaizen and Team Building.

**Hazardous Materials:** Training will be offered to Engineers, Managers/Supervisors, Production and Support Staff. Training will provide proper techniques for working with hazardous materials as it pertains to their specific job duties. Training topic include Handling Hazardous Material and Material Safety Data Sheets.

**Manufacturing Skills:** Training will be offered to the Engineers, Production and Support Staff. Training will improve techniques for working with equipment and the production of the product. Training topics include Case Packer, Forklift, and Maintenance and Repair.

### **Certified Safety Training**

**Hazardous Materials (HAZMAT)** This training is 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, Engineers, Managers/Supervisors, Production Staff, and Support Staff 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.

### **Productive Laboratory**

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

Sixty hours of PL-Manufacturing Skills Lab training will be offered to the Production and Support Staff. PL will build upon the training delivered in the classroom with hands-on experience of POM's production process and proper use of the equipment. Trainer-to-trainee ratio will generally be 1:1. However, there will be instances where up to three employees are needed to operate equipment such as the bottle making equipment. Therefore, POM is requesting a 1:3 trainer to trainee ratio.

Training will be delivered by an experienced in-house trainer, devoted to training during each training session, ensuring trainee meets the Company's core competencies. Trainer will use periodic observations and measurable skill assessments to assess trainees. Production will be slower during PL.

### **High Unemployment Area**

Some trainees (Job Number 2) work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's location in Fresno County is in a HUA.

#### ➤ Wage Modification

The Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. POM is requesting a wage modification, from \$16.70 per hour to \$12.53 per hour for Job Number 2.

### **Commitment to Training**

POM's annual training budget per facility is approximately \$250,000 for new-hire orientation, OSHA mandated training, sexual harassment prevention and first aid 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

The Human Resources Manager will oversee project administration. At the Fresno location, in addition to the Human Resources staff member, a manager, trainer, supervisor and a training coordinator will oversee the project. At the Los Angeles location, a Training Coordinator will oversee the project and send all rosters to the Fresno location. POM has also retained a third-party administrator with extensive ETP experience to assist with administration. Training will be delivered by in-house experts and vendors as needed.

### **RECOMMENDATION**

Staff recommends approval of this proposal.



**PRIOR PROJECTS**

The following table summarizes POM's performance under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0250	Fresno, Los Angeles	10/11/16 – 10/10/18	\$97,850	*\$0 (0%)
ET13-0407	Fresno	6/24/13 – 6/23/15	\$99,720	**\$0 (0%)

\*ET17-0250: Contract is currently in Fiscal Closeout and on track for potential earnings of \$97,850 (100% of approved amount).

\*\*ET13-0407: This contract was terminated early with no billing or performance. Training was put on hold while company necessarily implemented new operational procedures.

**DEVELOPMENT SERVICES**

National Training Company, Inc. in Irvine assisted with development for a flat fee of \$10,000.

**ADMINISTRATIVE SERVICES**

National Training Company, Inc. 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/E-Learning Hours**

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting
- Business Processes
- Coaching
- Communication
- Goal Setting
- Product Knowledge

**COMPUTER SKILLS**

- Cyber Security
- MS Office (Intermediate/Advanced)

**CONTINUOUS IMPROVEMENT**

- 5S
- Critical Thinking
- Kaizen
- Leadership
- LEAN
- Measuring for Success
- Problem Solving and Resolution
- Six Sigma
- Standard Operating Procedures
- Team Building

**HAZARDOUS MATERIALS**

- Hazardous Material Handling
- HAZMAT Operating Procedures
- Material Safety Data Sheets

**MANUFACTURING SKILLS**

- Boom Lift
- Bottle Making Equipment
- Case Packer
- Compliance Tracking
- Cross-Training
- Electrical Systems
- Emergency Planning
- Food Safety
- Forklift
- Extraction Equipment
- Equipment Drive Systems
- Equipment Set-Up and Testing
- Good Manufacturing Practices
- Inventory & Raw Materials Training
- Juice Filling Equipment



- Labeling Systems
- Maintenance and Repair
- Packing and Shipping
- Pick & Capping Systems
- Plastic Injection Molding
- Product Specifications
- Safety Quality Food
- Safety Leadership
- Tray Packer
- Yard Goat Trailer

### **Productive Lab Hours**

0-60

#### **MANUFACTURING SKILLS** (Ratio 1:3)

- Boom Lift
- Bottle Cap Equipment
- Forklift
- Fruit Conveyers
- Fruit Presses
- Juice Equipment
- Label Application Equipment
- Packing and Shipping
- Palletizing
- Plastic Bottle Forming Equipment
- Plastic Bottle Handling Equipment
- Quality Control and Inspection
- Sterilizing Equipment
- Transporting Liquids
- Waste Removal
- Yard Goat Trailer

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

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



**Training Proposal for:**  
**Pyramid Berkeley Management L.P. dba DoubleTree by**  
**Hilton Hotel Berkeley Marina**  
**Agreement Number: ET19-0354**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** S. Wang

**PROJECT PROFILE**

Contract Attributes:	Retrainee	Industry Sector(s):	Services (G)  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Alameda	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No UniteHere! Local 2850 (DoubleTree Berkeley)		
Number of Employees in:	CA: 928	U.S.: 9,200	Worldwide: 10,460
<u>Turnover Rate:</u>	13%		
<u>Managers/Supervisors:</u> (% of total trainees)	9%		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
\$193,700

<b>Total ETP Funding</b>
\$181,125

**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	\$1,035	\$18.22
				Weighted Avg: 45			

**Minimum Wage by County:** \$18.22 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 \$2.50 per hour of health benefits may be used to meet the Post-Retention Wage. Additionally, up to \$4.50 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
Administration		14
Food and Beverage		66
Front Desk		11
Housekeeping		55
Maintenance		14
Manager/ Supervisor		15

\*\$12.00 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**

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

Pyramid Berkeley Management L.P. dba Doubletree by Hilton Berkeley Marina (Pyramid Berkeley) will act as the lead employer, seeking 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 from across the globe. Each hotel has guest rooms, conference/convention facilities, a buffet restaurant, and other amenities. The Hotels qualify for standard retraining as more than 25% of revenue for each is attributed to out-of-state customers.

**Veterans Program**

Pyramid Berkeley encourages the hiring of Veterans.

## **PROJECT DETAILS**

This will be Pyramid Berkeley's second ETP Contract; second in the last five years. Training in the previous contract assisted with the hotels' transformation to a 4-Diamond rated hotel. Training focused on new technologies, kitchen layouts, room renovations, and teamwork for better customer service and elevated SALT (Satisfaction and Loyalty Tracking) and GEI (Guest Experience Index) scores.

Training will provide workers skills to continue the transition to a 4-Diamond rated hotel. Renovation of the hotel was completed in early 2018 and 4-Diamond service has already begun. New staff who did not participate in the previous Contract will receive skills training delivered in the previous Contract. Incumbent staff will receive training on updated equipment and service needs. Training will not be duplicated.

- Managers and Supervisors will receive a new focus on Leadership and Communication Skills for more effective and responsive teams while keeping the guest's needs in focus and providing great hospitality service.
- Food and Beverage Staff will be trained in a new upgrade to the Sales and Catering Software, Delphi, which helps manage group sales and volume contracts, track availability of event space, and coordinate details to ensure event services are delivered accordingly.
- Kitchen Staff and Servers will be trained in integrated kitchen and serving techniques to provide guests with a better dining experience.
- Housekeepers and Maintenance will be trained on attention to details and proper safety procedures, including the use of new chemicals and cleaning products. In addition, training on the new HotSOS software will reduce guest incidents and optimize maintenance order requests.

### **Training Plan**

Class/Lab and Computer-Based Training will be provided to staff by in-house subject-matter experts and vendors as necessary in the following:

**Business Skills:** This training will be offered to all occupations in course topics such as Accounting, Business Process, Communication Skills, and Negotiation Skills. Training will help in improving business efficiency.

**Computer Skills:** This training will be offered to all occupations in course topics such as Delphi Sales and Catering Software, HotSOS Software Skills, and Customer Information System. Trainees will learn to use the updated systems to serve customers.

**Continuous Improvement:** This training will be offered to all occupations. Topics include Teambuilding Skills, Quality Improvement, and Critical Thinking Skills. Training will help team members solve guest conflicts and serve guest with more confidence.

### **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**

Pyramid Berkeley has an annual training budget of approximately \$232,400. The training budget includes new-hire orientation, basic customer service, basic computer skills, OSHA-mandated training, and sexual harassment prevention.

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. At the completion of ETP-funded training, the Company will continue to provide training for employees to develop and grow within the Company.

➤ **Training Infrastructure**

Pyramid Berkeley is ready to start training upon approval. Pyramid Berkeley's General Manager will oversee the project. Additionally, each hotel has a designated HR Director and HR Assistant to help oversee and schedule training and collect ETP Rosters. Pyramid Berkeley has retained National Training Company to assist in administrative duties and will work with Management to fully comply with ETP Regulations.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

The following table summarizes Pyramid Berkeley's performance under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0185	Berkeley, Pleasanton	10/3/2016– 10/2/2018	\$178,500	\$176,728 (99%)

### **DEVELOPMENT SERVICES**

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

### **ADMINISTRATIVE SERVICES**

Pyramid Berkeley also retained National Training Company 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**

8-200

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
- Change Management
- Communication Skills
- Dealing With Difficult People
- Getting Results Through Accountability
- Integrated Kitchen Procedures
- Managing Workflow
- Negotiating Skills
- New Menu Presentation and Selling Skills
- Operating Procedures
- Point of Sale Skills
- Payroll Systems Skills
- PBX System Skills
- Reducing Negativity in the Workplace
- Resolving Guest Complaints
- Room Standards Techniques
- Service Standards
- Up-selling and Closing Skills

**COMPUTER SKILLS**

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

**CONTINUOUS IMPROVEMENT**

- Quality Improvement
- Team Building Skills
- Identifying/Meeting Guests Needs
- Improving Communication Skills with Guests
- Resolving Team Conflicts
- Resolving Guest Complaints

- Exceeding Guest Expectations
- Leadership Skills
- Critical Thinking Skills
- Standard Work Procedures

### **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)
- 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)
- Full Service Operations: At Your Service (30m)
- Guest Problem Solving – At Your Service Plus (30m)
- Guestroom Attendant:
  - Cleaning the Sleeping Area, Cleaning the Bathroom, Wrap-Up (60m)
  - Safety and Security, Preparing to Clean, Entering Guestrooms (60m)
- Housekeeping:
  - The Deep Cleaning Process (30m)
  - Quality Guestroom Cleaning (30m)
- Improving Guest Interaction: Best Face Forward (30m)
- Maintenance:
  - Overview (30m)
  - Your Property (15m)
  - Safety and Security (30m)
  - Preparing for Assignments (15m)
  - Minor Guestroom Repairs (30m)
  - Major Guestroom Repairs (30m)
  - Bathroom Repairs (30m)
  - Public Areas (30m)
  - Building and Grounds Maintenance (30m)
  - Equipment and Building Systems (30m)
  - Maintenance: Making Sure Hotel is Safe and Secure (30m)
  - Norovirus: Facts and Prevention (15m)
  - Quality Guestroom Maintenance (30m)
  - Wrap-Up (15m)
- Making Diversity Work for You (30m)
- Managing Safety on Your Shift (30m)
- Priority Setting and Multitasking in the Front Office (30m)
- Service Culture Training (120m)

<p>Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.</p>
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# **UNITEHERE! Local 2850**

East and North Bay's Union for hotel, foodservice, and gaming workers

1440 Broadway Suite 208, Oakland, CA 94612 | P: 510-893-3181 | F: 510-893-5362

August 21, 2018

Employment Training Panel  
1100 J Street  
4<sup>th</sup> Floor  
Sacramento, CA 95814

Re: DoubleTree by Hilton Berkeley Marina. Employment Training Panel - Ref: 18-0776

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  
[whuber@unitehere.org](mailto:whuber@unitehere.org)  
President  
UNITE HERE Local 2850  
1440 Broadway, Ste. 208  
Oakland, CA 94803





**Training Proposal for:**  
**Rabobank, National Association**  
**Agreement Number: ET19-0244**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Mam

**PROJECT PROFILE**

Contract Attributes:	Retrainee SET	Industry Sector(s):	Financial Services  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 1,571	U.S.: 2,800	Worldwide: 40,000
<u>Turnover Rate:</u>	16%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$198,030		\$0	\$0		\$198,030

<b>In-Kind Contribution:</b>	<b>100% of Total ETP Funding Required</b>	<b>\$241,080</b>
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**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, Computer Skills, Cont. Improv	410	8-200	0-20	\$483	\$30.36
				Weighted Avg: 21			

**Minimum Wage by County:** Job Number 1: \$30.36 SET Statewide Average Hourly Wage.

**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 \$2.50 per hour may be used to meet the Post-Retention Wage.

**Wage Range by Occupation**

Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Support Staff		50
Professional Support Staff		230
Sales Staff		100
Technician		30

**INTRODUCTION**

Founded in 1972 and headquartered in Roseville, Rabobank, National Association (Rabobank) ([www.rabobankamerica.com](http://www.rabobankamerica.com)), a subsidiary of Utrecht America Holdings, is a leading financial service provider for food and agriculture financing and sustainability-oriented banking. The Company services individuals, businesses, and agricultural clients worldwide. Training under this proposal will be for its 10 locations throughout California.

**PROJECT DETAILS**

This will be Rabobank's third ETP Agreement, the third within the last five years. In this proposal, Rabobank will continue to build on its previous training of increasing customer base by upgrading employee skills, developing effective sales skills, and improving customer satisfaction. As business expands, Rabobank has a heightened need for job specific training including improving communication skills, sales skills, and business acumen. Staff must continuously train on development and soft skills to retain new and existing clients.

The Company has also upgraded internal systems such as a new Enterprise Resource Planning System, a new Learning Management System, and a new Enterprise Risk System that requires companywide training to ensure successful implementation. Training will allow the Company to improve business competencies while providing staff with skills to meet service expectations.

Although training topics are similar to those provided in the prior Agreement, trainees will not repeat the same training courses previously received.

### **Training Plan**

Training will be delivered via Classroom/Laboratory E-Learning/Videoconferencing and Computer-Based Training (CBT) methods. In-house subject matter experts and vendors may be utilized to deliver training in the following:

**Business Skills:** Training will be offered to all occupations. Training will focus on improving project management. Training topics include Workday Training, Processing Transactions, and Business Fundamentals.

**Commercial Skills:** Training will be offered to all occupations. Training will focus on improving workflow processes. Training topics include Accounting Fundamentals, Commercial Risk Management, and Sales Development.

**Computer Skills:** Training will be offered to all occupations. Training will focus on implementation of the Company's upgraded systems. Training topics include Learning Management System, Operating Systems, and Adobe Intuition.

**Continuous Improvement:** Training will be offered to all occupations. Training will focus on increasing customer satisfaction. Training topics include Communication Skills, Navigating Conflict and Difficult Conversations, and Inspire Development Program.

### **Computer-Based Training**

CBT will be provided to supplement class/lab training. All trainees will receive approximately 20 hours of CBT.

### **Commitment to Training**

Rabobank invests \$512,223 annually per facility for training that includes compliance, performance management, and company orientation. 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

Rabobank has a Director of Learning & Development and a HR Coordinator responsible for overseeing all training and administration. The Director will coordinate with leads at each training locations to ensure recordkeeping guidelines are met. Rabobank has a detailed training plan in-place and is ready to begin training upon approval.

### **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.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0385	Statewide	04/04/16 – 04/03/18	\$240,000	\$201,783 (84%)
ET12-0394	Statewide	05/07/12 – 05/06/14	\$240,000	\$113,278 (47%)*

\*ET12-0394 was Rabobank's first ETP Agreement. During the first year of the Agreement term, the Company faced challenges which included delivering and coordinating training to multiple locations, having a limited learning team Staff, and getting accustomed to ETP guidelines. Rabobank hired an additional six employees to help administer the project including scheduling and delivering training.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

To Be Determined

**Exhibit B: Menu Curriculum****Class/Lab/E-Learning/Videoconferencing Hours**

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- ✚ Business Fundamentals
- ✚ Consumer Fundamentals
- ✚ Integrated Banking Solutions Inquiries
- ✚ Microsoft Power BI Tools
- ✚ Mission, Vision, & Strategy
- ✚ Opening Business Accounts
- ✚ Opening Consumer Accounts
- ✚ Personal Checking 'How To'
- ✚ Processing Transactions
- ✚ Values & Practices
- ✚ Workday Training

**COMMERCIAL SKILLS**

- ✚ Accounting Fundamentals
- ✚ Hindsight Review
- ✚ Cash Flow
- ✚ Financial Writing
- ✚ Commercial Risk Management
- ✚ Sales Development
- ✚ Sales Leadership

**COMPUTER SKILLS**

- ✚ Adobe Intuition
- ✚ Baker Hill
- ✚ Learning Management System
- ✚ Microsoft Office Suite (Intermediate and Advanced Only)
- ✚ Operating Systems

**CONTINUOUS IMPROVEMENT**

- ✚ Building Better Teams
- ✚ Communication Skills
- ✚ Inspire Development Program
- ✚ Navigating Conflict and Difficult Conversations
- ✚ Performance Management
- ✚ Personal Leadership
- ✚ Writing for Results

**CBT Hours**

0-20

**COMMERCIAL SKILLS**

- ✚ Applink for Bank2Business (2 hours)
- ✚ Applink for Bank2Consumer (2 hours)
- ✚ Branch Employee Training Programn (1 hour)
- ✚ Commercial Credit Policy & Procedures (2 hours)
- ✚ Commercial Risk Ratings (1 hour)

- ✚ Overview of the New Rabo Commercial Banking System (2 hours)
- ✚ Product Knowledge (2 hours)
- ✚ Rabobank Personal Checking Accounts (3 hours)
- ✚ TellerInsight Review (4 hours)
- ✚ Unconscious Bias (1.5 hours)

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:**  
**Riverside Magnolia Corporation dba West Anaheim**  
**Extended Care**

**Agreement Number: ET19-0355**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** San Diego

**Analyst:** C. Clady

**PROJECT PROFILE**

Contract Attributes:	SET Priority Rate Retrainee Job Creation Initiative Medical Skills Training	Industry Sector(s):	Services (G) Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 280	U.S.: 280	Worldwide: 280
<u>Turnover Rate:</u>	13%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$175,090

<b>Total ETP Funding</b>
\$124,436

**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	Business Skills, Computer Skills, Continuous Imp., MS- Didactic, MS Clinical with Preceptor, HazMat	163	8-200	0	\$572	\$22.77
				Weighted Avg: 22			
2	Priority Rate Job Creation Initiative SET	Business Skills, Computer Skills, Continuous Imp., MS- Didactic, MS Clinical with Preceptor, HazMat	30	8-200	0	\$1,040	*\$14.58
				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 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 Wage \$22.77 per hour Orange County

Job Number 2 ( Job Creation) \$ 14.58 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

Up to \$2.50 per hour maybe use to meet the Post- Retention Wage for Job Number 1, and up to \$0.58 for Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job 1: Retrainee</b>		
Administrative & Support Staff		30
CNA		15
LPN's'/ LVNs		64
Mental Health		18
Activities		11
Social Worker		7
Registered Nurse		18
<b>JOB 2 : Job Creation</b>		



CNA's		20
LPN's/LVN's		10

## **INTRODUCTION**

Founded in 1976 Riverside Magnolia Corporation dba West Anaheim Extended Care ([www.magnolia-rehab.com](http://www.magnolia-rehab.com)) (Riverside Magnolia) provides patient care to residents requiring IV therapy, Dementia care, Wound care, Respite stays, Enteral feeding program, Catheter, Colostomy, and Ileostomy care, Medication/Diabetic/Pain Management, Hospice and Restorative nursing.

The proposed training will target workers at its two California facilities located in Westminster (Extended Care Hospital of Westminster) (headquarters), and Anaheim (West Anaheim Extended Care). Riverside Magnolia Corporation is eligible for ETP funding under Special Employment Training (SET) for frontline workers. The Company qualifies for ETP's Priority Industry reimbursement of \$26.00 per hours as a health care employer.

Extended Care Hospital of Westminster customers are residents suffering from various stages of Alzheimer's disease and other Dementia's. The Company also specializes in mental health treatment care, where they teach residents skills to deal with their mental illness and eventually return into the community to live productive lives. West Anaheim Extended Care services resident patients in Post-Acute Rehabilitation, Long Term Care, and Compassionate End of Life Care.

## **PROJECT DETAILS**

The rapid growth of the senior demographic in Orange County has impacted the demand for long term care supportive services. In Orange County, five people turn 60 every hour, according to the Council on Aging Orange County. Seventy percent of Americans over age 65 will need some level of supportive services.

As a result, occupations related to eldercare are projected to be among the fastest growing in the economy over the next decade. Nurses, nursing assistants and LPN's/LVN's are projected to add more than 1.6 million new jobs by 2024.

To ensure quality standards are met, the Company enforces a Quality Assurance/Performance Improvement program which focuses on addressing care and management practices including clinical care, quality of life, and resident choice. Training will ensure all regulatory changes are met while improving quality processes, outcomes, and measures.

Training will focus on providing employees with the ability to utilize new technologies to maximize day-to-day tasks and efficiency. Employees will be cross-trained to increase productivity. Riverside Magnolia recognizes that it must identify new ways to reduce operating costs, efficiencies, customer service, and provide new value services to the communities it serves.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage. Trainees must be hired within 3 months before the date of the project approval, within the term of the contract as long as training and retention can be completed within the term of the agreement. These trainees will be hired into "net new jobs" as a condition of contract.

The increase in aging population necessitates the expansion of Riverside Magnolia's operations, services, and the respective workforce. To support and keep pace with the Company's expansion, Riverside Magnolia plans to add a total of 30 newly hired Certified Nurse Assistants, LPN's & LVN's (Job Number 2).

### **Special Employment Training**

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

### **SET Priority Industry Modification**

For trainees employed in a priority industry, The Panel may modify the SET wage up to 25% below the statewide average hourly wage to \$22.77. This wage modification is intended to train entry-level healthcare workers in lower wage occupations (CNA's, LVN's, LPN's and Social Workers) to provide opportunities for promotion, wage increase, and long term job security. Contractor is requesting this modification.

### **Training Plan**

**Business Skills:** Training will be offered to all occupations. Training will focus on accounting, business development, communication, leadership, and other related skills. Training will focus on providing employees with the ability to utilize new technologies to maximize day-to-day tasks and efficiency. The Company is committed to upgrading workers skills, implementing new processes and becoming more efficient.

**Computer Skills:** Training will be offered to all occupations on proprietary software applications for various functions that include charting, patient records management and scheduling. Training will provide trainees with skills necessary to effectively connect with patients through technology. These courses will support Riverside Magnolia's goal of increasing efficiencies and improving patient care.

**Continuous Improvement:** Training will be provided to all occupations. Training topics include Communication Skills, Coordination of Care, and Customer Service, Documentation Skills, Interdisciplinary Team Process, National Patient Safety Goals, Problem Solving, Team Building, and Quality Assessment and Improvement. Training will focus on high-level performance, customer service, and quality of care. Training is also necessary to improve documentation skills to foster quality and continuity of care.

**Medical Skills Training Didactic:** Training will be offered to CNA; LPN's LVN's and RN's. All trainees will receive one or more modules of MS Didactic training (classroom) in specialized medical care. MS Didactic training is essential for healthcare staff to understand the clinical processes and prepare them for work. Training will include updates in patient care skills including Long term Care, Pain Management Documentation Skills, Wound Care, Medical Equipment Training and Pharmacy/Medication Training. Training will also include skills on patient evaluation, planning and intervention in situations that arise during the patient care process.

**Medical Skills Training – Clinical with Preceptor:** Training will be offered to CNA's, LPN's, LVN's and RN's. Trainees will observe hands-on skills under a formalized mentoring program pairing an experienced team member with other nurses. Training will include Clinical Assessment, Competency Training, Medication Delivery, Plan of Care Development and Implementation. Preceptor training will also support Didactic skills training.

**Hazardous Materials:** Training will be offered to CAN's LPN, LVN's and RN's to learn Hazardous Material identification and handling for patient care providers.

## **Commitment to 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. The Company's annual training budget per facility is approximately \$200,000. In the past, employee training included sexual harassment prevention, new hire orientation, diversity training, Theft and Loss Policy and Procedure, and general safety training.

### ➤ Training Infrastructure

Riverside Magnolia will utilize an administrative subcontractor to assist with ETP project administration. The Company's Lead Administrator and Assistant Administrator will be responsible for the management and administration of the ETP project. In addition, Operations Managers at each location will assist with enrollment and compliance.

Training will be delivered by in-house instructors, and vendors as needed.

## **Impact/Outcome**

Riverside Magnolia training goals are to create a focused, strategically planned skills training program, to encourage, foster, and promote continued development of employees to the highest possible skill level, and to create an optimal system medical care. Trainees will participate in various classroom assessment techniques (CATs).

ETP funding will increase trainee skills to effectively care of its special patient population, reduce hospital readmissions, and meet quality standards. Funding will also assist in hiring and training novice allied health staff. Certifications earned from training are the following:

- Nursing Home Administrators License from Department of Health;
- Complete Administrator Training Program.
- Valid Certified Nurse Assistant License
- Licensed Vocational Nurse
- Certified Occupational Therapy Assistant
- Social Services Designee Certification

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

Riverside Magnolia retained Corporate Tax Incentives in Rancho Cordova to assist with development of this proposal for a flat fee of \$13,899.66.

## **ADMINISTRATIVE SERVICES**

Corporate Tax Incentives 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

ETP 130 - Single (08/29/18)

## **Exhibit B: Menu Curriculum**

### **Class/Lab Hours**

8-200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Accounting/Finance
- Business Development and Sales
- Business Plan
- Communication Skills
- Conflict Resolution
- Customer Relations
- Developing Business Relationships
- Financial Strategies
- Goal Setting
- Interpersonal Communication
- Inventory Control
- Leadership
- Marketing
- Negotiation and Agreements
- Performance Management
- Presentation Skills
- Program Management
- Project Management
- Team Cohesiveness
- Time Management

#### **COMPUTER SKILLS**

- Clinical Services System Management
- 3rd Party Software System Management
- Document Software
- Electronic Medical Records
- Insurance Software
- Intranet Software
- MS Office Suite Skills (Intermediate & Advanced only)
- Patient Billing, Accounts Receivable and Financial
- Payroll/Human Resources Software
- Provider Access Websites

#### **CONTINUOUS IMPROVEMENT**

- Administration
- Clinical Services System Management
- Case Management
- Communication Skills
- Coordination of Care
- Conflict Resolution
- Customer Service
- Compliance & Patient Privacy
- Documentation Skills

- Incident/Accident Management
- Interdisciplinary Team Process
- Medical Record Keeping
- Mobility Skills
- National Patient Safety Goals
- Patient Centered Care
- Problem Solving
- Process Improvement
- Team Building
- Quality Assessment and Improvement

**MEDICAL SKILLS DIDACTIC**

- Advanced Cardiac Life Support (ACLS)
- Activities of Daily Living
- Advanced Directives
- Annual Skills Update
- Arterial Blood Gas (ABG) Interpretation
- Assessing Cardiac Changes
- Assessing Respiratory Function
- Basic Life Support (BLS)
- Behavior Management
- Body Mechanics
- Cardiac Conditions
- Care of the Pleura Patient
- Central Venous Access Devices
- Concepts of Death and Dying
- Dementia Care
- Depression
- Diabetic Management
- Disease Management
- Electrolyte Imbalance
- Elder Abuse
- Enteral Feeding Tube Management
- End-of-Life Care
- Equipment Skills
- Functional Mobility & Ambulation
- Gastrointestinal Assessment & Management
- Grief and Bereavement
- Handling of Death in a Home
- Hazardous Materials
- Home Health Care Skills
- Hospice Skills
- Incontinence Management (Colostomy Care, Urinary Catheter)
- Infection Control
- Intravenous (IV) Therapy
- Influenza Vaccination
- Medication Administration & Management
- Medical Social Worker Skills
- Neurological Conditions
- Occupational Therapy Skills
- Orthopedic Conditions

- Pain Management (Acute & Chronic)
- Palliative Care
- Patient Assessment & Care
- Patient Fall Prevention
- Patient Transfer Techniques
- Physical Therapy Skills
- Pressure Ulcers
- Point-of-Care Laboratory Testing
- Psychological Issues Related to Death and Dying
- Rehabilitation Skills
- Respiratory Care
- Speech Therapy Skills
- Supplies, Medical gasses and drugs
- Tracheotomy Care
- Urinary Management (Foley Catheter, Input/Output)
- Wound Management
- Wound Vacuum-Assisted Closure (VAC) Therapy

#### **MEDICAL SKILLS CLINICAL WITH PRECEPTOR**

- **Rehabilitative Services**
- Patient Assessment & Care
- Dementia Care
- Diabetic Management
- Enteral Feeding Tube Management
- Equipment Skills
- Infection Control
- Intravenous (IV) Therapy
- Medication Administration & Management
- Rehabilitation Skills
- Equipment Operation
- Quality Assurance/Performance Improvement (QAPI)

#### **Therapy Services**

- Body Mechanics
- Functional Mobility & Ambulation
- Infection Control
- Neurological Conditions
- Occupational Therapy Skills
- Orthopedic Conditions
- Patient Assessment & Care
- Physical Therapy Skills
- Rehabilitation Skills
- Speech Therapy Skills
- Quality Assurance Performance Improvement (QAPI)

#### **HAZARDOUS MATERIALS**

- OSHA 10/30

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



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Royal Ambulance, Inc.**

**Agreement Number: ET19-0347**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** S. Wang

**PROJECT PROFILE**

Contract Attributes:	SET Retrainee Medical Skills Training Priority Rate	Industry Sector(s):	Services (G) Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, San Mateo, Santa Clara	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 269	U.S.:269	Worldwide: 269
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
\$121,897

<b>Total ETP Funding</b>
\$115,908

**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, HazMat, MS Preceptor, MS Didactic, PL- Comm Skills	37	8-200	0	\$884	\$22.77
				Weighted Avg: 34			
2	Job Creation SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, HazMat, MS Preceptor, MS Didactic, PL- Comm Skills	40	8-200	0	\$2,080	\$15.18
				Weighted Avg: 80			

**Minimum Wage by County:** Job Number 1: \$22.77 statewide;  
 Job Number 2: \$15.18 per hour for Alameda and 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 \$2.50 per hour for Job Number 1 and up to \$0.18 for Job 2 may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job 1: Retrainee</b>		
Administration		8
Dispatch		2
EMT		4
Marketing		5
Medical Biller		4
Registered Nurse		14
<b>Job 2: Job Creation</b>		
EMT		40

**INTRODUCTION**

Founded in 2006 and headquartered in San Leandro, Royal Ambulance, Inc. (Royal Ambulance) (<http://royalambulance.com>) provides 24/7 emergency and non-emergency ambulance transportation to 20 communities in the Alameda County, 20 communities in San Mateo County and 24 communities in the Santa Clara County. Royal Ambulance specializes in transporting critically ill patients that need various levels of care and services, such as Basic Life Support



Transport (BLS) and Critical Care/Advanced Care Life Support Transport (ACLS). The Company also provides dispatch services. Customers include hospitals, healthcare systems, fire departments, and law enforcement.

This is Royal Ambulance's first ETP Agreement. Training will be conducted at the Company's San Leandro and San Jose facilities.

### **Veterans Program**

Royal Ambulance is committed to hiring Veterans. Currently, 4% of the company's workforce are Active or Reserve Veterans working as EMTs, Managers, or Administration.

### **PROJECT DETAIL**

Royal Ambulance strives to provide patients with the best medical transportation. However, annual updates to the Emergency Medical Dispatcher, Commission on Accreditation of Ambulance Services (CAAS), and National Association of EMT's (NAEMT) has impacted services. Training is needed on these updates for all staff to stay current on industry standards and practices to continue the Company's goal of providing quality care and excellent service.

Royal Ambulance is also preparing to implement the ECT- Hand Held Tablet Device. This device assists and simplifies tasks for ambulance staff by providing a single system that can coordinate and manage all necessary equipment and information for an assignment. Tablets allow employees to navigate to accident sites, classify and monitor patient conditions, and report information back to emergency dispatchers and hospital.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

Royal Ambulance is currently experiencing a shortage in EMT staff. Each year, the Company provides an average of 40,000 transports and this average is projected to grow by 20% annually. In addition, the Company is expanding its transportation service within the next two years to areas in San Francisco County. To keep pace with service demands and business expansion, the Company plans to hire 40 EMTs (26 in San Leandro and 14 in San Jose) over the course of the Agreement. Newly hired EMTs will need extensive training to gain competence in pre-hospital assessments and care of patients of all ages with a variety of medical conditions. The date-of-hire for 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 be delivered via Class/Lab, E-Learning and Productive Lab (PL) in the following:

**Business Skills:** Training will be offered to all occupations in Customer Relations, Business Development and Sales, and Communication Skills. Training will focus on providing employees with the skills to maximize tasks efficiently.

**Computer Skills:** Training will be offered to all occupations to effectively utilize software systems to perform job-specific duties. Topics include Billing Software, Electronic Medical Records System, Dispatch Software, Emergency Medical Response Management Software, and Navigation Software.

**Commercial Skills:** Training will be provided to all occupations in topics such as Crisis Prevention and Intervention, Documentation, Standard Operating Procedures, and EMS Operations. This training will improve customer service quality and safety.

**Hazardous Materials:** Training will be provided to EMT and Registered Nurses to learn Hazardous Materials identification and handling for patient care providers. The skills will ensure a safe environment while working with patients.

**Medical Skills – Didactic:** Training will be provided to approximately 58 EMTs and Registered Nurses. Training will be conducted via classroom on topics such as Patient Assessment and Pre-Hospital Care, Equipment Operation Skills, Advanced Cardiac Life Support, Basic Life Support, Decontamination Procedures, EKG and Cardiac Monitors, and Critical Care Transport. Trainees will learn clinical processes to prepare them to serve patients.

**Medical Skills- Preceptor:** Training will be provided to approximately 58 EMTs and Registered Nurses. Clinical with Preceptor (ratio 1:1) and will help trainees familiarize themselves with patient acuity level.

### **E-Learning**

E- Learning will be provided to all occupations in Business Skills, Computer Skills, Commercial Skills, Hazardous Materials, and Medical Skills – Didactic. To allow learning flexibility, trainees may connect remotely if not requested to travel to its headquarter facility.

### **Productive Laboratory**

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

Royal Ambulance will provide up to 60 hours of PL-Commercial Skills to ETM, JC EMT, and Registered Nurse. Staff will receive hands-on training in topics such as Supervised Field Training, Standard Operating Procedures, EVOC (Emergency Vehicle Operations), and Equipment Operation. During PL training, assignments will be structured around a standardized system to determine the trainee's level of competency.

Training will be conducted by experienced EMT and Registered Nurse that have been employed with Royal Ambulance for 4-8 years. The trainer to trainee ratio will not exceed 1:1.

### **Special Employment Training**

Under SET, the participating employer is not required to demonstrate out-of-state competition. Trainees must earn at least the statewide average hourly wage at the end of the retention period. For trainees employed in a priority industry, the Panel may modify the SET wage up to 25% below the statewide average hourly wage (from \$30.36 to \$22.77). The Company is requesting this modification for Job Number 1.

### **Commitment to Training**

Royal Ambulance has an annual training budget of approximately \$261,560 for its San Leandro facility and \$151,520 for its San Jose facility. Annually, the company invests 28,000 hours of training and development for its employees company-wide. (EMTs average about 26,000 hours of training.) The training budget includes healthcare training, equipment operation and services, safety, and transport training.

ETP funds will not displace the existing financial commitment to training. At the completion of the ETP training, the Company will continue to provide its workforce with skills needed to develop and grow within. Safety training is provided in accordance with all pertinent requirements under state and federal law.

### **Training Infrastructure**

Royal Ambulance's Vice President will oversee all training and project administration. Training will be provided by dedicated in-house subject-matter experts and vendors, if necessary. The Company has a well-established training platform using an internal proprietary scheduling and tracking system. Training records will be maintained at its main office in San Leandro. Additionally, the Company retained a third party subcontractor to oversee administration.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

The Company retained Corporate Tax Incentive (CTI) in Rancho Cordova to assist with development of this proposal for a flat fee of \$5,818.

### **ADMINISTRATIVE SERVICES**

The Company also retained CTI 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 and E-Learning Hours**

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting/Finance
- Business Development and Sales
- Communication Skills
- Conflict Resolution
- Customer Relations
- Customer Service Skills
- Developing Business Relationships
- Financial Strategies
- Goal Setting
- Interpersonal Communication
- Inventory Control
- Marketing
- Negotiation Skills
- Performance Management
- Presentation Skills
- Product Knowledge
- Program Management
- Project Interview and Forecasting
- Project Management
- Team Cohesiveness
- Time Management

**COMPUTER SKILLS**

- Accounting Software
- Billing Software
- Client Management Relationship
- Communication Software
- Dispatch Software
- Electronic Medical Records System (EMS)
- Emergency Medical Response Management Software
- Navigation Software
- Scheduling Software

**COMMERCIAL SKILLS**

- Ambulance Operation Skills
- Call Center and Dispatch Protocols
- Crisis Prevention and Intervention (CPI)
- Critical Thinking
- Documentation Standard Operating Procedures
- EMS Communication and Protocols
- EMS Operations
- EMS Response to Terrorism/Clinical & Ambulance Rotations
- Equipment Operation

- EVOG (Emergency Vehicle Operations)
- Leadership
- Performance & Quality Improvement
- Train-the-Trainer
- Standard Operating Procedures
- Transport Logistics and Standardized Protocols

### **HAZARDOUS MATERIALS**

- HazMat for Patient Care Providers

### **MEDICAL SKILLS – DIDACTIC**

- Abdominal Emergencies
- Abdominal Trauma
- Abuse and Assault
- Acute Interventions for the Chronic-Car Patient
- Advanced Cardiac Life Support (ACLS)
- Advanced Prehospital Care
- Airborne Pathogens
- Airway Management Ventilation
- Allergies and Anaphylaxis
- Ambulance & Medical Equipment Operation
- Anatomy & Physiology
- Basic Cardiac Life Support
- Basic Life Support (BLS)
- Behavioral/Psychiatric Emergencies and Suicide
- Bleeding and Shock
- Bloodborne Pathogens
- Blunt Trauma
- Body Mechanics
- Burns
- Cardiac Assessment
- Cardiology
- Care of and Treatment of Shock Patients
- Care of the Renal Patients
- Care of the Stroke Patient
- Chest and Abdominal Trauma
- Chronic Obstructive Pulmonary Disease (COPD)
- Clinical Decision Making
- Code Blue Response and Procedures (Cardiac Arrest)
- Communications
- Critical Care Skills
- Decontamination Procedures
- Diabetic Emergencies and Altered Mental Status
- Documentation
- Dysrhythmia Recognition & Interpretation
- EKG & Cardiac Monitors
- Emergencies for Patients with Special Challenges
- Emergency Medical Care
- Emergency Medical Technician (EMT) Skills
- Endocrinology

- Environmental Emergencies
- Equipment Operation Skills
- Gastroenterology
- Geriatric Abuse – Special Home
- Geriatric Emergencies
- Gynecology
- Hazardous Materials, Multiple-Casualty Incidents, and Incident Management
- Head, Facial and Neck Trauma
- Hematologic and Renal Emergencies Life Span Development
- Hematology
- Hemorrhage and Shock
- Highway Safety and Vehicle Extrication
- HIPPA
- History Taking
- Infectious Disease
- Life Span Development
- Lifting and Moving Patients
- Medical Emergencies
- Medical Terminology
- Medical Training
- Medical Transport of High-Risk Patients
- Medication Administration
- Medication Administration & Reconciliation
- Multisystem Trauma
- Musculoskeletal Trauma
- Neonatal
- Neonatology
- Neurological Assessment& Pre-Hospital Care
- Neurology
- Obstetrics & Gynecology
- Orthopedic Assessment& Pre-Hospital Care
- Oxygen Administration
- Pain Management
- Pathophysiology
- Patient Assessment & Pre-Hospital Care
- Pediatric Advanced Life Support (PALS)
- Pediatric Intensive Care
- Pediatric Patient Care
- Pediatrics
- Penetrating Trauma
- Pharmacology
- Pharmacology & Pharmacokinetics
- Physical Exam Techniques
- Poisoning and Overdose Emergencies
- Prehospital Care
- Pre-Hospital Trauma Life Support
- Psychiatric Patient Care
- Pulmonology
- Research Principles and Evidence-Based Practice

- Respiration and Artificial Ventilation
- Respiratory Arrest
- Respiratory Assessment & Pre-Hospital Care
- Respiratory Emergencies Scene Size-Up
- Restraints
- Scene Size-Up
- Soft-Tissue Trauma
- Special Operations
- Spinal Trauma
- Standards of Care
- The Challenged Patient
- Therapeutic Communication
- Thoracic Trauma
- Toxicology and Substance Abuse
- Transport Physiology
- Trauma Emergencies
- Trauma to the Head, Neck, and Spine
- Urology and Nephrology
- Ventilation, Perfusion, and Shock: Understanding Pathophysiology
- Ventilator Operation
- Vital Signs and Monitoring Devices

**MEDICAL SKILLS – PRECEPTOR (Ratio 1:1)**

- Supervised Clinical Field Ambulance Training

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

**PL Hours**

0 – 60

**COMMERCIAL SKILLS (limited 1:1 trainer to trainee ratio)**

- Supervised Field Training
- Processes and Standards
- Standard Operating Procedures
- Transport Logistics and Standardized Protocols
- EVOC (Emergency Vehicle Operations)
- Equipment Operation

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:**

**S. Bravo Systems, Inc.**

**Agreement Number: ET19-0346**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** E. Wadzinski

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Manufacturing (E)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 138	U.S.: 140	Worldwide: 140
<u>Turnover Rate:</u>	11%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
\$142,000

<b>Total ETP Funding</b>
\$135,590



**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., HazMat, Mfg. Skills, PL-Mfg. Skills	119	8-200	0	\$1,040	\$17.54
				Weighted Avg: 40			
2	Retrainee Priority Rate Job Creation	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills	7	8-200	0	\$1,690	*\$14.62
				Weighted Avg: 65			

\*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 Number 1: \$17.54 in Los Angeles County

Job Number 2 (Job Creation): \$14.62 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 \$2.44 per hour may be used to meet the Post-Retention Wage in Job Number 1; and up to \$1.12 per hour for Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administration/Clerical		6
Customer Service/Sales		8
Engineering		6
Production		63
Production Administration		2
Shipping		4
Frontline Managers		3
Supervisors		8
Maintenance Mechanics		2
CNC Machinists		8
Welders		8

Drivers		1
<b>Job Number 2</b>		
Production		7

## **INTRODUCTION**

Founded in 1987, S. Bravo Systems, Inc. (Bravo) ([www.sbravo.com](http://www.sbravo.com)) is a certified woman-owned, and Made in the USA accredited manufacturer of high performance secondary containment systems for the petroleum equipment industry. Bravo produces SingleWall and DoubleWall containment sumps in both steel and fiberglass including, dispenser sumps, tank /turbine sumps, transition sumps, and above ground/marina sumps. The Company uses the latest in material science and manufacturing technology to protect the environment from contamination of the soil or ground water.

Primary customers include gas stations, convenience stores, card lock fuel facilities, marinas, and commercial and government fuel dispensing locations; including airports and military bases. Training will take place at the Company's facility in Commerce. This will be Bravo's first ETP Contract.

### **Veterans Program**

Although the Company does hire Veterans, they do not currently have a formal program for the recruiting or hiring Veterans.

## **PROJECT DETAILS**

Recently, Bravo has experienced sales growth exceeding 40%. This growth was due to higher standards related to fuel dispensing containment systems in California. Bravo clients must upgrade their equipment to meet these requirements. More recently, the Environmental Protection Agency (EPA) passed legislation that raised the bar on requirements for fuel dispensing containment systems. This new legislation has manufacturer's needing Bravo products to upgrade their specifications and meet the EPA's requirements. Federal regulations have caught up with the more stringent California standards. As a result, Bravo's products are now applicable nationwide and the Company is experiencing tremendous demand.

For Bravo to meet growing customer demand, the Company must improve processes, increase capacity; as well as employee skill levels. Bravo has invested over \$226,000 in new and upgraded software systems for sales, customer service, and production/Inventory functions. In addition, over \$300,000 is being invested in new and upgraded tooling for the production processes. ETP training will help the Company re-tool processes and provide training to employees to address demand for its product.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. These trainees will be hired into "net new jobs" as a condition of contract.

To address ongoing customer demand due to the EPA's new legislation Bravo is expanding its business capacity and will hire seven new Production employees (Job Number 2). These new

employees will help support business growth and the Company's investment in new technology and equipment.

## Training Plan

Training will be delivered via Class/lab and Productive Lab in the following:

**Business Skills:** Training will be offered to all occupations and include account development, effective communications, business writing, time management, strategic planning, purchasing best practices and project management. This training will provide knowledge to help increase sales and customer service, organization, communication and purchasing expertise leading while increasing efficiency with customers.

**Computer Skills:** Training will be offered to all occupations in systems and computer applications to raise expertise and to increase utilization on Bravo systems. Training will also be offered in ERP/SAP software training, as well as Microsoft applications. Training will also be offered in Computer Assisted Drawing (CAD, AUTOCAD, CAD 3D) applications.

**Continuous Improvement:** Training will be offered to all occupations on teambuilding, leadership, and lean processes to reduce waste, increase efficiencies, and maintain product quality.

**Hazardous Materials:** Training will be offered to all occupations to provide knowledge on how to prevent hazards and/or address potential hazardous exposure. Engineers, Technicians and Managers will also receive training in the proper labeling of hazardous materials, how to read and comprehend these labels, proper transportation and storage of hazardous materials, and reporting and clean up procedures in the event of a spill accident.

**Manufacturing Skills:** Training will be offered to Production, Engineers, CNC Machinists, Welders and Maintenance Mechanics. Training will provide new and upgraded skills on equipment operation and cross training to increase proficiency to support industry standards in quality and capacity. Training will allow employees to better manage manufacturing processes while implementing the new processes.

## Productive Laboratory

Trainees may produce goods for profit as part of the PL-Manufacturing Skills training in the courses identified under the Curriculum. The instructor will be dedicated to training delivery during all hours of training. Bravo will train Production for approximately 14 hours on laser cutters, computer numerical control lathe equipment, drill presses, grinders, punch presses and production molds. This training is crucial for trainees in basic tools used in production. PL will also provide new and upgraded skills on the operation of new tooling equipment purchased to address increased production.

PL training will be hands-on, and the trainer will observe trainees performing tasks and offer coaching and mentoring throughout the process. As a result of the PL training the employees productivity will decrease by 40 to 50% due to anticipated re-work and increased material waste. Trainers will attest and certify employee competency at the end of training. Most training will be at a 1:1 trainer-to-trainer ratio, however the Company is requesting a 1:2 ratio to provide training on equipment where two people operate the machine.

**Commitment to Training**

Bravo spends approximately \$50K annually on training including basic skills, Basic SB198 safety, harassment prevention and new employee orientation. 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**

The Company is ready to start training upon approval. The Quality Manager will oversee the administration and training plan for this Contract. The Company has also retained a third-party subcontractor to assist with administration. Training will be delivered by in-house experts and vendors as needed.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

Strategic Business Solutions, LLC in Visalia assisted with development for a flat fee of \$5,750.

**ADMINISTRATIVE SERVICES**

Strategic Business Solutions, LLC 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**

- Account Development Training
- Effective Communications
- Business Writing
- Project Management
- Strategic Planning
- Time Management
- Purchasing Best Practices (APICS)

**COMPUTER SKILLS**

- ERP/SAP Software training
- Microsoft Applications (Intermediate/Advanced)
- CAD/AutoCAD/CAD 3D Software training

**CONTINUOUS IMPROVEMENT**

- Leadership
- Teambuilding
- LEAN Processes
- Kaizen Events
- 5 “S” Training
- Supervisors Skills Training

**HAZARDOUS MATERIALS**

- HazMat Awareness
- Hazardous Materials Handling

**MANUFACTURING SKILLS**

- Production Equipment Operation (Molds Press, Grinders)
- Visual Factory Inventory Practices
- Materials Handling Equipment Training
- Metal Fabrication
- CNC Operations
- Production Molding
- Welding
- Production Math

Safety Training cannot exceed 10% of a trainee’s total training hours.  
(This cap does not apply to HazMat)

**Productive Lab Hours**

0-14

**MANUFACTURING SKILLS** (Ratio 1:2)

- Production Equipment Operation (Molds Press, Grinders)

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:**

**School Innovations & Achievement**

**Agreement Number: ET19-0335**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** D. Jordan

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative SB <100	Industry Sector(s):	Manufacturing (E)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	El Dorado, Los Angeles, Shasta	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 80	U.S.: 83	Worldwide: 83
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$118,622

<b>Total ETP Funding</b>
\$104,780

**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 Improvement, Mgmt. Skills	80	8-200	0	\$1,144	\$16.70
				Weighted Avg: 44			
2	Retrainee Job Creation Initiative SB <100 Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Mgmt. Skills	10	8-200	0	\$1,326	*\$13.66
				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.

**Minimum Wage by County:** Job Number 1: \$16.70 per hour in El Dorado and Shasta Counties, \$17.54 per hour in Los Angeles County. Job Number 2: \$13.66 per hour in El Dorado and Shasta Counties, \$14.62 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 \$2.23 per hour may be used to meet the Post-Retention Wage for Job Number 1 and up to \$0.62 for Job Number 2.**

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff		7
Customer Service		18
Executive Staff		5
IT Staff		14
Manager		11
Owner		2
Processing Staff		5
Program Advisor		13
Sales Staff		5
<b>Job Number 2</b>		
Administrative Staff		1
Customer Service		2

IT Staff		2
Manager		2
Processing Staff		1
Program Advisor		1
Sales Staff		1

## **OVERVIEW**

Founded in 2003 and headquartered in El Dorado Hills, School Innovations & Achievement (SIA) ([www.sia-us.com](http://www.sia-us.com)) is a software developer that provides custom software solutions for schools. SIA has grown from the back office facilitator for most California's school districts and county offices of education, into the creator of software solutions. The Company's most notably software is Attention2Attendance designed to decrease school absenteeism for school districts. Training will be delivered at SIA's locations in El Dorado Hills, Redding and Pasadena. This is SIA's third ETP proposal, the third in the last five years.

### **Veterans Program**

Although this project does not include a Veterans component, and SAI does not actively recruit specifically for Veterans, there may be Veterans among the training population and on staff.

### **Need For Training**

Training in SIA's prior agreement focused on new software programs including College and Career Readiness, Kindergarten through Third Grade Package and Tipping Point Letters. These products provided parents and students a better understanding of the resources available to them, while also tracking attendance patterns at an early age. Under this proposal, training will focus on training staff on their mobile platform Appcelerator Cross-Platform. Appcelerator Cross-Platform enables SIA's clients to access SIA's applications through their mobile devices. Training on the mobile platform will be delivered to the entire company since it will affect every aspect of SIA's business. The mobile platform will communicate with their web-based platform and correspond with the applications and services SIA provides.

Training also includes new products and product enhancements including Behavior Alert and Risk Management products. These products allows SIA's clients to stay in compliance with mandates and requirements that are required in their districts. These new products require hands on training that must be delivered to clients. Although course topics are similar to prior Agreements, in no case will a trainee repeat the same training previously delivered.

### **Training Plan**

Training will be delivered via Class/Lab, Videoconference and E-Learning by in-house subject matter experts in the following:

**Business Skills:** Training will be offered to all occupations. Training will focus on marketing skills to identify and secure clients as well as customer service skills to maintain existing clients. Training topics include Sales Techniques, Strategic Planning, Interpersonal Communications, Contract Preparation and Accounting.

**Computer Skills:** Training will be offered to Administrative, Customer Service, IT, Processing and Sales Staff. Training will focus on improving IT development and support. Staff will also receive training on financial operations and managing their professional development and



certification database. Training topics include Autodesk/AutoCAD, Computer Programming, Crystal Reports, WIX Website Management Application, and Marketing and Sales Tracking Software.

**Continuous Improvement:** Training will be offered to all occupations. Staff will receive training on operational processes, improvements in team building, team leading and problem solving. Training topics include Systems Failure Analysis, Communication Skills, Process Improvement and Visual Controls.

**Management Skills:** Training will be offered to Managers. Training will focus on leadership skills, decision-making, and increasing productivity. Training topics include Supervisor Skills, Decision Making, Finance for Technical Managers and Effective Meetings for Leaders.

### **Commitment to Training**

SIA annual training budget is approximately \$150,000 for safety, foreman training and employee improvement. The Company is committed to improving facility efficiencies and knowledge for all team members. 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

SIA has a structured training plan in place and is ready to start training upon project approval. The Project Manager will oversee project administration with the HR Manager and two Administrative Staff will assist with project administration. Propel Consulting Group will also assist with administrative duties. Training will be delivered by in-house experts and vendors as needed.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **ACTIVE PROJECTS**

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0460	\$95,439	03/09/2017 – 03/08/2019	91	89	89

Based on ETP Systems, 3,825 reimbursable hours have been tracked for potential earnings of \$100,050.60 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to and in progress.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0136	El Dorado, Pasadena, Redding	08/01/2015 – 07/31/2016	\$48,048	\$48,048 (100%)

**DEVELOPMENT SERVICES**

Propel Consulting Group in El Dorado Hills assisted with development for a flat fee of \$10,000.

**ADMINISTRATIVE SERVICES**

Propel Consulting Group 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, and Videoconference**

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting
- Business Fundamentals
- Business Performance
- Business Writing
- Behavior Style Strategies
- Conflict Resolution
- Contract Preparation
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Communication Skills
- Dealing with Difficult People
- Essential Skills for the New Supervisor
- Financial Analysis
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques
- Negotiating
- Operational Skills
- Planning and Organization
- Presentation Skills
- Product Knowledge
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Retaining Customers
- Relationship Building
- Sales Techniques
- Strategic Planning
- Successful Selling Techniques/Sales
- Time Management

**COMPUTER SKILLS**

- Adobe Acrobat
- Adobe CS InDesign
- Appcelerator's Cross-Platform Model
- Autodesk/AutoCAD
- Client Relationship Management Software
- Computer Networking
- Computer Programming
- Conferencing Mobile Application (iOS & Android)
- Crystal Reports
- Development Software

- Digital Entertainment and multimedia
- Financial Management System
- IT Support Tracking System
- Inspire Content Letter Management System
- Marketing & Sales Tracking Software
- Microsoft Office Intermediate and Advanced
- Microsoft Visual Studio (Team Foundation System)
- Network & Database Admin Software
- QuickBooks
- SQL Server (Management Studio)
- Software applications and equipment
- WIX Website Management Application

### **CONTINUOUS IMPROVEMENT**

- Cross Training
- Communication Skills
- Creating a Quality Organization
- Change Management
- Decision Making
- How to Coach and Mentor
- IT Support Technician Skills
- Leadership
- Meeting Management
- Product Management
- Production Scheduling
- Production Operations/Workflow
- Process Improvement
- Project Management
- Problem Solving and Decision Making
- Quality Measurement Systems
- Quality Management
- Statistical Process Control
- Systems Failure Analysis
- Strategic Planning
- Team Building
- Teamwork Development Skills
- Time Management
- Train-the-trainer
- Visual Controls

### **MANAGEMENT SKILLS (Managers and Supervisors only)**

- Administration
- Decision Making
- Effective Meetings for Leaders
- Finance for Technical Managers
- Leadership
- Motivation
- Supervisor Skills
- Teambuilding

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



**Training Proposal for:**  
**Sempra Energy dba Southern California Gas Company**  
**Agreement Number: ET19-0344**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** J. Romero

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Services (G) Utilities (22) Mining, Oil Gas (21)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Utility Workers Union of America Locals 132, 483, 522 and International Chemical Workers Union Council Locals 478 and 350		
Number of Employees in:	CA: 8,500	U.S.:15,900	Worldwide: 20,000
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
\$363,546

<b>Total ETP Funding</b>
\$191,464

**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	263	8-200	0	\$728	\$17.54
				Weighted Avg: 28			

**Minimum Wage by County:** \$17.54 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

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
Construction Technician		60
Energy Tech-Distribution		70
Instrument Specialist		24
Lead Construction Technician		40
Measurement & Regulation Technician I		21
Measurement & Regulation Technician II		21
System protection Specialist		27

**INTRODUCTION**

Found in 1998, Sempra Energy dba Southern California Gas Company (Sempra), ([www.socalgas.com](http://www.socalgas.com)), is a natural gas distribution utility company that deliver clean, safe and reliable energy to 21.8 million consumers through 5.9 million meters in more than 500 communities in California. The Company's service territory encompasses approximately 24,000 square miles in diverse terrain throughout Central and Southern California, from Visalia to the Mexican border. Sempra operates from its two locations (Los Angeles and San Diego).

The demand in the gas industry has grown with the needs of a growing population. Sempra is facing higher compliance requirements including state and federal regulations. In addition, Sempra has recently bought equipment that reduces methane emissions from leakage, routine maintenance and accidental damage situations. The Company is in the process of installing this equipment throughout the California area, which will be used in pipe locating, gas detection,

measurement, regulation, testing and instrumentation of possible methane emissions. Sempra must train workers on new processes, technology and equipment to use essential equipment.

### **Veterans Program**

Although there is not a Veteran component to this project, the Company does actively recruit Veterans. Some Veterans will be included in this proposal.

### **Union Support**

The Utility Workers Union of America Locals 132, 483, 522 and International Chemical Workers Union Council Locals 478 and 350 has provided letter of support for the training of its union members.

## **PROJECT DETAILS**

This is Sempra's third ETP Agreement, and its first in five years. Training in this proposal will be provided to the employees in the Los Angeles facility only. The Company plans to train and develop worker skills, efficiency and ultimately increase employee retention. Sempra must be compliant with all regulations and policies governing the gas industry. Sempra also wants to develop new employees' skills to maximize productivity.

### **Training Plan**

**Commercial Skills:** Training will be offered to all occupations to develop employee skills, knowledge and competency in gas transmission, distribution, storage, technical services and office support. Topics include inspection, maintenance, new installation, replacement, damage prevention, repair and troubleshooting.

### **Commitment to Training**

Sempra currently provides training on the basic job requirements for each job classification using simulation and on-the-job training setting in various areas of gas operations, damage prevention and troubleshooting. ETP funds will not displace the existing financial commitment to training. In addition, safety training is, and will continue to be provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

Sempra has a detailed training plan in place and is ready to start training upon approval. The Training and Development Manager and the Operations Training Supervisor will oversee the project and will work closely with the Technical Specialist and two Training Coordinators who will facilitate training. Training will be delivered by Sempra's in-house experts and vendors as needed.

## **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**

- Construction Technician
  - Excavating & Backfilling Trenches
  - Lockout/Tagout
  - Oxy-Acetylene and Gas Cylinder Handling
  - Operating and Maintaining Small and Pneumatic Tools
  - Shoring and Sloping
  - Leakage, Clamps and Repair
  - Pipeline Installation Methods
  - Testing, Pressure and Time Requirements
  - Valve Identification
- Cathodic\System Protection
  - Interference
  - Troubleshooting and Correcting Interference
  - Line Dropping
  - Installing Under Cathodic Protection
  - Rectifier Circuitry and Components
- Energy Technician – Distribution
  - Building Customer Loyalty
  - Pipe Inspection & Supply Line Patrol
  - Damage Prevention
- Lead Construction Technician
  - Hazardous Waste, Run-Off and Dewatering
  - Recognizing Corrosion
  - Leak Centering
  - Atmospheric Testing
  - Reading & Interpreting Construction Drawing
  - Field Gas Handling Procedures
  - Introduction to Construction Equipment
- Instrument Specialist – Basic
  - Electrical Circuit Control and Drawings
  - Gas Detection
- Instrument Specialist – Basic
  - Basic Electricity
  - Calculating Wire Resistance
  - DC Circuits
  - Single & Three Phase Power Systems
- Measurement and Regulation Technician I
  - Gas Delivery Basics
  - Spring-Operated Regulators
  - Pilot-Loaded Regulation/Relief Valves
  - Confined Space, Vault Inspection & Maintenance
- Measurement and Regulation Technician II
  - Inspecting District Pressure Charts & Electronic Pressure Monitors
  - Inferential Meters
  - Investigate Unusual Consumption

- Mercury Electronic Pressure Correctors
- Electric Safety and Test Equipment

Safety Training cannot exceed 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.



**TRAINING PROPOSAL AMENDMENT**

Skyworks Solutions, Inc.

**Approval Type:** Panel

**Reference Number:** 17-0657

**Contract Number:** 18CS-0028-000

**Panel Meeting Date:** 12/07/2018  
**Regional Office:** North Hollywood Regional Office  
**Analyst Name:** Webb, Monique  
**Contract Term Date:** 8/3/2017 - 8/2/2019

**Revision Number:** 2  
**Requested Date:** 09/24/2018  
**Revision Status:** In Executive Review  
**Effective Date:**

**Proposal Type:** Single Employer Contract (SE)  
**Critical Proposal:** No  
**Funding Source:** OSC

**FUNDING AMENDMENT:**

Current Funding (\$)		Requested Funding Increase (\$)		Revised Funding (\$)	
\$42,400.00		\$46,240.00		\$88,640.00	
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In Kind	
\$76,522.00	\$12,118.00	N/A	\$0.00	\$82,228.00	

**PROJECT PROFILE**

<b>Repeat Contractor:</b>	Yes			
<b>High Unemployment Area:</b>	No	<b>Turn Over Rate(Applicant):</b>	0.00 %	
Industry Sector		Priority Industry		
Manufacturing		Yes		
Professional, Scientific, and Technical		Yes		

**AMENDMENT REQUEST DETAILS:**

**Reason for the Amendment Request:**

Skyworks Solutions requests additional funds to accommodate the increased demand for training.

**REVISED ITEMS:**

**Costing Group**

Attribute	Job Title	No. Trainees		Min Training Hours		Max Training Hours		Estimated Training Hours	
		From	To	From	To	From	To	From	To
<i>Group No. 1 Location: Advanced Analogic Technologies Incorporated</i>									
S-RET	Sr. IT/Engineering Staff - R	1	1	8.00	8.00	200.00	200.00	15.00	32.00
	Operations Staff - R	1	1	8.00	8.00	200.00	200.00	15.00	32.00
	Technician Staff - R	3	3	8.00	8.00	200.00	200.00	15.00	32.00

	Quality Staff - R	1	1	8.00	8.00	200.00	200.00	15.00	32.00
	Supervisor/Manager/Director - R	1	1	8.00	8.00	200.00	200.00	15.00	32.00
	Sr. Supervisor/Manager/Director - R	1	1	8.00	8.00	200.00	200.00	15.00	32.00
	IT/Engineering Staff - R	4	4	8.00	8.00	200.00	200.00	15.00	32.00
<b>Group No. 1 Location: Irvine</b>									
S-RET	Sr. IT/Engineering Staff - R	3	3	8.00	8.00	200.00	200.00	15.00	32.00
	Operations Staff - R	3	3	8.00	8.00	200.00	200.00	15.00	32.00
	Quality Staff - R	3	3	8.00	8.00	200.00	200.00	15.00	32.00
	Sr. Supervisor/Manager/Director - R	3	3	8.00	8.00	200.00	200.00	15.00	32.00
	IT/Engineering Staff - R	15	15	8.00	8.00	200.00	200.00	15.00	32.00
	Supervisor/Manager/Director - R	3	3	8.00	8.00	200.00	200.00	15.00	32.00
	Technician Staff - R	12	12	8.00	8.00	200.00	200.00	15.00	32.00
<b>Group No. 1 Location: Isolink, Inc.</b>									
S-RET	IT/Engineering Staff - R	1	1	8.00	8.00	200.00	200.00	15.00	32.00
	Technician Staff - R	1	1	8.00	8.00	200.00	200.00	15.00	32.00
<b>Group No. 1 Location: Skyworks Solutions Inc</b>									
S-RET	IT/Engineering Staff - R	30	30	8.00	8.00	200.00	200.00	15.00	32.00
	Sr. IT/Engineering Staff - R	6	6	8.00	8.00	200.00	200.00	15.00	32.00
	Supervisor/Manager/Director - R	6	6	8.00	8.00	200.00	200.00	15.00	32.00
	Technician Staff - R	24	24	8.00	8.00	200.00	200.00	15.00	32.00
	Quality Staff - R	6	6	8.00	8.00	200.00	200.00	15.00	32.00
	Operations Staff - R	6	6	8.00	8.00	200.00	200.00	15.00	32.00
	Sr. Supervisor/Manager/Director	6	6	8.00	8.00	200.00	200.00	15.00	32.00
<b>Group No. 2 Location: Irvine</b>									
S-RET-JOBCREATION	Quality Staff - JC	1	1	8.00	8.00	200.00	200.00	23.00	40.00
	Operations Staff - JC	1	1	8.00	8.00	200.00	200.00	23.00	40.00
	Supervisor/Manager/Director - JC	1	1	8.00	8.00	200.00	200.00	23.00	40.00
	Technician Staff - JC	1	1	8.00	8.00	200.00	200.00	23.00	40.00
	IT/Engineering Staff - JC	1	1	8.00	8.00	200.00	200.00	23.00	40.00

<b>Group No. 2 Location: Skyworks Solutions Inc</b>									
S-RET-JOBCREATION	IT/Engineering Staff - JC	1	1	8.00	8.00	200.00	200.00	23.00	40.00
	Operations Staff - JC	1	1	8.00	8.00	200.00	200.00	23.00	40.00
	Technician Staff - JC	1	1	8.00	8.00	200.00	200.00	23.00	40.00
	Quality Staff - JC	1	1	8.00	8.00	200.00	200.00	23.00	40.00
	Supervisor/Manager/Director - JC	1	1	8.00	8.00	200.00	200.00	23.00	40.00

**Amended Funding Detailed**

Funding	Group No.	Attributes	Number Of Trainees	Weighted Average Hours	Reimbursement Rate	Cost Per Trainee	Cost Per Group
OSC	1	S-RET	140	32	\$18.00	\$576.00	\$80,640.00
	2	S-RET-JOBCREATION	10	40	\$20.00	\$800.00	\$8,000.00
		<b>Funding Total:</b>	150				\$88,640.00
		<b>Grand Total:</b>	150				\$88,640.00

<b>Legend of Attributes</b>	
Code	Description
S	Single Employer
RET	Retrainee
JOBCREATION	Job Creation – Retrainee Initiative Program

**Introduction**

Founded in 1962, Skyworks Solutions, Inc., (Skyworks) is a manufacturer of analog and mixed signal semiconductors. The company's products include customized power amplifiers and front-end components used in many cellular phones and devices. Customers include Apple, Cisco, Ericsson, Foxconn, and LG Electronics.

**Amendment Details**

Skyworks is eight months into its ETP Contract and has submitted enough training hours to reach 100% of the total contract amount (\$42,400). However, the Company still has a substantial amount of training to provide staff over the next year. As a result, Skyworks requests to increase the contract amount from \$42,400 to \$88,640. The Company would like to increase the weighted average in Job Number 1 from 15 to 32; and in Job Number 2 from 23 to 40. Skyworks continues to grow and expand its business to meet the increased demand. This demand is a byproduct of the Company's growth in headcount (+80 net new employees hired between September 1, 2017 and August 31, 2018) and new/updated products. With the advent of 5G connectivity, the Skyworks is slated to increase its number of products and with that comes an expansion of various work areas, including the need for more tool sets and technicians to run them.

**Recommendations**

Staff recommends approval of this Amendment requests.

**ACTIVE CONTRACT PERFORMANCE**

This table summarizes active contract(s) performance for Skyworks Solutions, Inc.

Contract Number	Approved Amount	Term	Total No. Trainees (Estimated)	Trainees Enrolled	Trainees Completed Training	Total Trainees Retained
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18CS-0028-000	\$42,400.00	08/03/2017 - 08/02/2019	150	249	0	0
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Based on the ETP System, for the current contract 3063.50 reimbursable hours have been tracked for potential earnings of \$55,399.00 (130.63 % of approved amount)

## Exhibit B: Curriculum

### Classroom /Simulated Laboratory

Training Type (Level)	Course/Class Topic
Computer Skills (Standard)	JMP (Java Server Pages) Scripting
Business Skills	Advanced Customer Support
Manufacturing Skills (ME) (Standard)	Advanced Engineering Skills/Methodologies
Continuous Improvement Skills	Advanced Leadership Skills
Manufacturing Skills (ME) (Standard)	Agile/Rapid Product Design
Continuous Improvement Skills	Analytical Decision Making/Critical Thinking Skill
Business Skills	Business/Technical Writing Skills
Continuous Improvement Skills	Certified Supply Chain Professional
Business Skills	Communication Skills for Business
Continuous Improvement Skills	Cross Functional Teambuilding
Manufacturing Skills (ME) (Standard)	Design Simulation Tools and Proficiency
Manufacturing Skills (ME) (Standard)	Engineer Cross Training
Business Skills	Finance for Engineers/Finance Workshop
Manufacturing Skills (ME) (Standard)	HAZWOPER
Computer Skills (Standard)	Intermediate/Advanced Microsoft Office Skills
Continuous Improvement Skills	Internal Auditor Training/Certification
Business Skills	International/Cultural Effectiveness in Business
Computer Skills (Standard)	Network Devices/Components/Applications
Manufacturing Skills (ME) (Standard)	New Design and Engineering Methodology
Business Skills	New Products/Technology
Manufacturing Skills (ME) (Standard)	Potential Failure Mode Effects and Analysis
Business Skills	Presentation Design and Delivery Skills
Continuous Improvement Skills	Process/Performance/Design Improvement
Manufacturing Skills (ME) (Standard)	Product Design and Troubleshooting for Technicians
Continuous Improvement Skills	Production and Inventory Management Certific
Continuous Improvement Skills	Program/Project Management
Continuous Improvement Skills	Quality Management System
Computer Skills (Standard)	Quality System Application Skills
Business Skills	Sales/Marketing Strategies
Computer Skills (Standard)	Software Programming Skills
Computer Skills (Standard)	Software/Hardware Design Application Skills
Continuous Improvement Skills	Statistics for Design Engineering
Business Skills	Train-The Trainer Skills
Continuous Improvement Skills	Troubleshooting/Root Cause Analysis

### E-Learning - Instructor Led/Distance Learning

Training Type (Level)	Course/Class Topic
Business Skills	Advanced Customer Support
Manufacturing Skills (ME) (Standard)	Advanced Engineering Skills/Methodologies



Continuous Improvement Skills	Advanced Leadership Skills
Manufacturing Skills (ME) (Standard)	Agile/Rapid Product Design
Continuous Improvement Skills	Analytical Decision Making/Critical Thinking Skill
Business Skills	Business/Technical Writing Skills
Continuous Improvement Skills	Certified Supply Chain Professional
Business Skills	Communication Skills for Business
Continuous Improvement Skills	Cross Functional Teambuilding
Manufacturing Skills (ME) (Standard)	Design Simulation Tools and Proficiency
Manufacturing Skills (ME) (Standard)	Engineer Cross Training
Business Skills	Finance for Engineers/Finance Workshop
Manufacturing Skills (ME) (Standard)	HAZWOPER
Computer Skills (Standard)	Intermediate/Advanced Microsoft Office Skills
Continuous Improvement Skills	Internal Auditor Training/Certification
Business Skills	International/Cultural Effectiveness in Business
Computer Skills (Standard)	JMP (Java Server Pages) Scripting
Computer Skills (Standard)	Network Devices/Components/Applications
Manufacturing Skills (ME) (Standard)	New Design and Engineering Methodology
Business Skills	New Products/Technology
Manufacturing Skills (ME) (Standard)	Potential Failure Mode Effects and Analysis (FMEA)
Business Skills	Presentation Design and Delivery Skills
Continuous Improvement Skills	Process/Performance/Design Improvement
Manufacturing Skills (ME) (Standard)	Product Design and Troubleshooting for Technicians
Continuous Improvement Skills	Production and Inventory Management Certification
Continuous Improvement Skills	Program/Project Management
Continuous Improvement Skills	Quality Management System
Computer Skills (Standard)	Quality System Application Skills
Business Skills	Sales/Marketing Strategies
Computer Skills (Standard)	Software Programming Skills
Computer Skills (Standard)	Software/Hardware Design Application Skills
Continuous Improvement Skills	Statistics for Design Engineering
Business Skills	Train-The Trainer Skills
Continuous Improvement Skills	Troubleshooting/Root Cause Analysis

### **E-Learning - Computer Based Training (CBT)**

<b>Training Type (Level)</b>	<b>Course/Class Topic</b>	<b>Standard CBT Hours</b>
Manufacturing Skills (ME) (Standard)	5S Overview 151	1.50
Manufacturing Skills (ME) (Standard)	AC Fundamentals 210	1.50
Manufacturing Skills (ME) (Standard)	AC Motor Applications 240	1.50
Manufacturing Skills (ME) (Standard)	AC Motor Controls and Relay Ladder Logic	1.50
Manufacturing Skills (ME) (Standard)	AC Power Sources 235	1.50
Manufacturing Skills (ME) (Standard)	Acceleration Methods 385	1.50
Manufacturing Skills (ME) (Standard)	Actuator Applications 240	1.50

Manufacturing Skills (ME) (Standard)	Additional Function Block Diagram Instructions	1.50
Manufacturing Skills (ME) (Standard)	Additional Ladder Diagram Instructions for	1.50
Manufacturing Skills (ME) (Standard)	Advanced Hole Inspection 341	1.50
Manufacturing Skills (ME) (Standard)	Advanced Product Quality Planning (APQP)	1.50
Manufacturing Skills (ME) (Standard)	Applications for Robots 130	1.50
Manufacturing Skills (ME) (Standard)	Approaches to Maintenance 131	1.50
Manufacturing Skills (ME) (Standard)	APQP/FMEA/Control Plans/Error Proo ng	1.50
Manufacturing Skills (ME) (Standard)	Assessments	1.50
Manufacturing Skills (ME) (Standard)	Automated Systems and Control 135	1.50
Manufacturing Skills (ME) (Standard)	Basic Function Block Diagram Programming	1.50
Manufacturing Skills (ME) (Standard)	Basic Hydraulic Circuit Design 310	1.50
Manufacturing Skills (ME) (Standard)	Basic Ladder Diagram Programming for	1.50
Manufacturing Skills (ME) (Standard)	Basic Measurement 101	1.50
Manufacturing Skills (ME) (Standard)	Basic Pneumatic Circuit Design 315	1.50
Manufacturing Skills (ME) (Standard)	Basic Programming 250	1.50
Manufacturing Skills (ME) (Standard)	Basics of Ladder Logic 220	1.50
Manufacturing Skills (ME) (Standard)	Basics of Siemens PLCs 200	1.50
Manufacturing Skills (ME) (Standard)	Basics of Tolerance 121	1.50
Manufacturing Skills (ME) (Standard)	Battery Selection 250	1.50
Manufacturing Skills (ME) (Standard)	Bearing Applications 210	1.50
Manufacturing Skills (ME) (Standard)	Belt Drive Applications 230	1.50
Manufacturing Skills (ME) (Standard)	Blueprint Reading 131	1.50
Manufacturing Skills (ME) (Standard)	Calibration and Documentation 371	1.50
Manufacturing Skills (ME) (Standard)	Calibration Fundamentals 111	1.50
Manufacturing Skills (ME) (Standard)	Cell Design and Pull Systems 161	1.50
Manufacturing Skills (ME) (Standard)	Clutch and Brake Applications 250	1.50
Manufacturing Skills (ME) (Standard)	Concepts of Robot Programming 210	1.50
Manufacturing Skills (ME) (Standard)	Conducting an Internal Audit 201	1.50
Manufacturing Skills (ME) (Standard)	Conducting Kaizen Events 191	1.50
Manufacturing Skills (ME) (Standard)	Conductor Selection 240	1.50
Manufacturing Skills (ME) (Standard)	Contactors and Motor Starters 250	1.50
Manufacturing Skills (ME) (Standard)	Contamination and Filter Selection 330	1.50
Manufacturing Skills (ME) (Standard)	Continuous Process Improvement: Identifying and	1.50
Manufacturing Skills (ME) (Standard)	Continuous Process Improvement: Managing Flow 124	1.50
Manufacturing Skills (ME) (Standard)	Control Devices 260	1.50
Manufacturing Skills (ME) (Standard)	Data Manipulation 360	1.50
Manufacturing Skills (ME) (Standard)	DC Circuit Components 221	1.50

Manufacturing Skills (ME) (Standard)	DC Motor Applications 230	1.50
Manufacturing Skills (ME) (Standard)	DC Power Sources 230	1.50
Manufacturing Skills (ME) (Standard)	Deceleration Methods 380	1.50
Manufacturing Skills (ME) (Standard)	Design of Experiments (DOE)	1.50
Manufacturing Skills (ME) (Standard)	Developing a Lean Culture 135	1.50
Manufacturing Skills (ME) (Standard)	Distribution Systems 320	1.50
Manufacturing Skills (ME) (Standard)	Documenting and Developing Process Flow	1.50
Manufacturing Skills (ME) (Standard)	Electrical Instruments 220	1.50
Manufacturing Skills (ME) (Standard)	Electrical Print Reading 261	1.50
Manufacturing Skills (ME) (Standard)	Electrical Units 101	1.50
Manufacturing Skills (ME) (Standard)	Electrician: Industrial	1.50
Manufacturing Skills (ME) (Standard)	Electronic Semiconductor Devices 350	1.50
Manufacturing Skills (ME) (Standard)	Eliminating Waste 125	1.50
Manufacturing Skills (ME) (Standard)	End Effectors 125	1.50
Manufacturing Skills (ME) (Standard)	Equipment/Tool Design and Development 137	1.50
Manufacturing Skills (ME) (Standard)	Factory Automation 360	1.50
Manufacturing Skills (ME) (Standard)	Failure Mode and Effects Analysis (FMEA)	1.50
Manufacturing Skills (ME) (Standard)	Fittings for Fluid Systems 135	1.50
Manufacturing Skills (ME) (Standard)	Fluid System Print Reading 220	1.50
Manufacturing Skills (ME) (Standard)	for Siemens PLCs 290	1.50
Manufacturing Skills (ME) (Standard)	for Siemens PLCs 310	1.50
Manufacturing Skills (ME) (Standard)	for Siemens PLCs 330	1.50
Manufacturing Skills (ME) (Standard)	Forces of Machines 110	1.50
Manufacturing Skills (ME) (Standard)	Function Block Diagram Timers and Counters	1.50
Manufacturing Skills (ME) (Standard)	Fundamentals: Firm Grasp on Waste and	1.50
Manufacturing Skills (ME) (Standard)	GD&T	1.50
Manufacturing Skills (ME) (Standard)	GD&T for DFM	1.50
Manufacturing Skills (ME) (Standard)	GD&T Overview	1.50
Manufacturing Skills (ME) (Standard)	Gear Applications 245	1.50
Manufacturing Skills (ME) (Standard)	Gear Geometry 240	1.50
Manufacturing Skills (ME) (Standard)	Getting 5S Right	1.50
Manufacturing Skills (ME) (Standard)	Hand-Held Programmers of PLCs 280	1.50
Manufacturing Skills (ME) (Standard)	Hardware for PLCs 210	1.50
Manufacturing Skills (ME) (Standard)	Hole Standards and Inspection 141	1.50
Manufacturing Skills (ME) (Standard)	Hydraulic Connectors and Conductors	1.50
Manufacturing Skills (ME) (Standard)	Hydraulic Control Valves 230	1.50
Manufacturing Skills (ME) (Standard)	Hydraulic Fluid Selection 320	1.50
Manufacturing Skills (ME) (Standard)	Hydraulic Power Sources 210	1.50
Manufacturing Skills (ME) (Standard)	Hydraulic Power Variables 200	1.50

Manufacturing Skills (ME) (Standard)	Hydraulic Principles and System Design 340	1.50
Manufacturing Skills (ME) (Standard)	Hydraulic Troubleshooting Using Schematics	1.50
Manufacturing Skills (ME) (Standard)	In-Line Inspection Applications 381	1.50
Manufacturing Skills (ME) (Standard)	Industrial Electrical Fundamentals	1.50
Manufacturing Skills (ME) (Standard)	Industrial Network Integration 260	1.50
Manufacturing Skills (ME) (Standard)	Inspecting a Cylindrical Part 331	1.50
Manufacturing Skills (ME) (Standard)	Inspecting a Prismatic Part 321	1.50
Manufacturing Skills (ME) (Standard)	Inspecting with CMMs 361	1.50
Manufacturing Skills (ME) (Standard)	Inspecting with Optical Comparators 351	1.50
Manufacturing Skills (ME) (Standard)	Inspector: Mechanical	1.50
Manufacturing Skills (ME) (Standard)	Integrating Green Manufacturing and Lean	1.50
Manufacturing Skills (ME) (Standard)	Interpreting GD&T 310 (1994)	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Circuits 201	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Electric Motors 200	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Fluid Conductors 130	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Fluid Systems 100	1.50
Manufacturing Skills (ME) (Standard)	Introduction to GD&T 200	1.50
Manufacturing Skills (ME) (Standard)	Introduction to GD&T 301	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Hydraulic Components 120	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Lean: Overview of the Lean Toolbox	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Lubrication	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Machine Rigging 110	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Magnetism 211	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Mechanical Systems 100	1.50
Manufacturing Skills (ME) (Standard)	Introduction to PLCs 200	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Pneumatic Components 125	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Robotics 110	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Six Sigma 171	1.50
Manufacturing Skills (ME) (Standard)	Introduction to Supply Chain Management 140	1.50
Manufacturing Skills (ME) (Standard)	ISO 9000 Review 121	1.50
Manufacturing Skills (ME) (Standard)	Kaizen Event Fieldbook (eBook)	1.50
Manufacturing Skills (ME) (Standard)	Kaizen Workshop	1.50
Manufacturing Skills (ME) (Standard)	Kanban: Inventory and Demand Management	1.50
Manufacturing Skills (ME) (Standard)	Ladder Diagram Timers and Counters for	1.50
Manufacturing Skills (ME) (Standard)	Lean Manufacturing	1.50
Manufacturing Skills (ME) (Standard)	Lean Manufacturing Overview 101	1.50
Manufacturing Skills (ME) (Standard)	Level 1 Industrial Hydraulics	1.50

Manufacturing Skills (ME) (Standard)	Level 1 PLC Fundamentals	1.50
Manufacturing Skills (ME) (Standard)	Level 1 Pneumatics	1.50
Manufacturing Skills (ME) (Standard)	Level 2 Industrial Hydraulics	1.50
Manufacturing Skills (ME) (Standard)	Lifting and Moving Equipment 130	1.50
Manufacturing Skills (ME) (Standard)	Limit Switches and Proximity Sensors 360	1.50
Manufacturing Skills (ME) (Standard)	Logic and Line Diagrams 220	1.50
Manufacturing Skills (ME) (Standard)	Lubricant Fundamentals 130	1.50
Manufacturing Skills (ME) (Standard)	Maintaining a Consistent Lean Culture 330	1.50
Manufacturing Skills (ME) (Standard)	Maintenance and Repair: General	1.50
Manufacturing Skills (ME) (Standard)	Maintenance and Repair: Industrial Machinery	1.50
Manufacturing Skills (ME) (Standard)	Major Rules of GD&T 311	1.50
Manufacturing Skills (ME) (Standard)	Management Tools: Problem Solving 270	1.50
Manufacturing Skills (ME) (Standard)	Management Tools: Product and Process Design 275	1.50
Manufacturing Skills (ME) (Standard)	Managing Practices for Total Quality 320	1.50
Manufacturing Skills (ME) (Standard)	Managing Teams in Manufacturing (video)	1.50
Manufacturing Skills (ME) (Standard)	Manufacturing Survey	1.50
Manufacturing Skills (ME) (Standard)	Mapping Your Value Stream (video)	1.50
Manufacturing Skills (ME) (Standard)	Material Flows in Your Business	1.50
Manufacturing Skills (ME) (Standard)	Math for PLCs 320	1.50
Manufacturing Skills (ME) (Standard)	Measuring Lean Systems 350	1.50
Manufacturing Skills (ME) (Standard)	Measuring System Analysis 300	1.50
Manufacturing Skills (ME) (Standard)	Mechanical Fundamentals	1.50
Manufacturing Skills (ME) (Standard)	Mechanical Power Variables 200	1.50
Manufacturing Skills (ME) (Standard)	Metrics for Lean 231	1.50
Manufacturing Skills (ME) (Standard)	NEC Overview 150	1.50
Manufacturing Skills (ME) (Standard)	Networking for PLCs 270	1.50
Manufacturing Skills (ME) (Standard)	Numbering Systems and Codes 230	1.50
Manufacturing Skills (ME) (Standard)	Numbers, Codes, and Data Types for	1.50
Manufacturing Skills (ME) (Standard)	Overview of PLC Registers 305	1.50
Manufacturing Skills (ME) (Standard)	Parallel Circuit Calculations 211	1.50
Manufacturing Skills (ME) (Standard)	Photoelectric and Ultrasonic Devices 365	1.50
Manufacturing Skills (ME) (Standard)	Photonic Semiconductor Devices 355	1.50
Manufacturing Skills (ME) (Standard)	PID for PLCs 350	1.50
Manufacturing Skills (ME) (Standard)	Planning and Executing Kaizen	1.50
Manufacturing Skills (ME) (Standard)	Planning Manufacturing Cells	1.50
Manufacturing Skills (ME) (Standard)	PLC Diagrams and Programs 300	1.50
Manufacturing Skills (ME) (Standard)	PLC Inputs and Outputs 240	1.50
Manufacturing Skills (ME) (Standard)	PLC Installation Practices 340	1.50

Manufacturing Skills (ME) (Standard)	PLC Program Control Instructions 310	1.50
Manufacturing Skills (ME) (Standard)	PLC Timers and Counters 260	1.50
Manufacturing Skills (ME) (Standard)	Pneumatic Control Valves 235	1.50
Manufacturing Skills (ME) (Standard)	Pneumatic Power Sources 215	1.50
Manufacturing Skills (ME) (Standard)	Pneumatic Power Variables 205	1.50
Manufacturing Skills (ME) (Standard)	Power Transmission Components 120	1.50
Manufacturing Skills (ME) (Standard)	Preventive Maintenance for Fluid Systems 140	1.50
Manufacturing Skills (ME) (Standard)	Process Design and Development 133	1.50
Manufacturing Skills (ME) (Standard)	Process Flow Charting 241	1.50
Manufacturing Skills (ME) (Standard)	Product Design and Development 134	1.50
Manufacturing Skills (ME) (Standard)	Production System Design and Development 136	1.50
Manufacturing Skills (ME) (Standard)	Quality and Customer Service 175	1.50
Manufacturing Skills (ME) (Standard)	Quality Overview 100	1.50
Manufacturing Skills (ME) (Standard)	Reduced Voltage Starting 370	1.50
Manufacturing Skills (ME) (Standard)	Reversing Motor Circuits 310	1.50
Manufacturing Skills (ME) (Standard)	Rigging Equipment 120	1.50
Manufacturing Skills (ME) (Standard)	Rigging Inspection and Safety 210	1.50
Manufacturing Skills (ME) (Standard)	Rigging Mechanics 220	1.50
Manufacturing Skills (ME) (Standard)	Robot Axes 140	1.50
Manufacturing Skills (ME) (Standard)	Robot Components 120	1.50
Manufacturing Skills (ME) (Standard)	Robot Installations 230	1.50
Manufacturing Skills (ME) (Standard)	Robot Maintenance 170	1.50
Manufacturing Skills (ME) (Standard)	Robot Safety 115	1.50
Manufacturing Skills (ME) (Standard)	Robot Sensors 150	1.50
Manufacturing Skills (ME) (Standard)	Robot Troubleshooting 160	1.50
Manufacturing Skills (ME) (Standard)	Robotic Control Systems 240	1.50
Manufacturing Skills (ME) (Standard)	Robotic Drives, Hardware, and Components 220	1.50
Manufacturing Skills (ME) (Standard)	Role of TPM in the Lean Enterprise	1.50
Manufacturing Skills (ME) (Standard)	Safety for Electric Work 115	1.50
Manufacturing Skills (ME) (Standard)	Safety for Hydraulics and Pneumatics 105	1.50
Manufacturing Skills (ME) (Standard)	Safety for Mechanical Work 111	1.50
Manufacturing Skills (ME) (Standard)	Sample of Knowledge Edge content	1.50
Manufacturing Skills (ME) (Standard)	Sequencer Instructions for PLCs 330	1.50
Manufacturing Skills (ME) (Standard)	Series Circuit Calculations 201	1.50
Manufacturing Skills (ME) (Standard)	Shift Registers 370	1.50
Manufacturing Skills (ME) (Standard)	Siemens Human Machine Interfaces 250	1.50
Manufacturing Skills (ME) (Standard)	Siemens PLC Communication 230	1.50
Manufacturing Skills (ME) (Standard)	Siemens PLC Hardware 210	1.50

Manufacturing Skills (ME) (Standard)	Siemens PLC Inputs and Outputs 240	1.50
Manufacturing Skills (ME) (Standard)	Siemens PLC Programming Concepts 270	1.50
Manufacturing Skills (ME) (Standard)	Siemens PLCs 220	1.50
Manufacturing Skills (ME) (Standard)	Siemens PLCs 280	1.50
Manufacturing Skills (ME) (Standard)	Siemens PLCs 300	1.50
Manufacturing Skills (ME) (Standard)	Siemens PLCs 320	1.50
Manufacturing Skills (ME) (Standard)	Siemens Safety Integrated for	1.50
Manufacturing Skills (ME) (Standard)	Siemens SIMATIC Modular PLCs 260	1.50
Manufacturing Skills (ME) (Standard)	Siemens SIMATIC S7-1200 PLCs 340	1.50
Manufacturing Skills (ME) (Standard)	Siemens SIMATIC S7-1500 PLCs 350	1.50
Manufacturing Skills (ME) (Standard)	Six Sigma Goals and Tools 310	1.50
Manufacturing Skills (ME) (Standard)	Six Sigma Green Belt	1.50
Manufacturing Skills (ME) (Standard)	Six Sigma Yellow Belt	1.50
Manufacturing Skills (ME) (Standard)	SMED: Setup/Changeover Reduction	1.50
Manufacturing Skills (ME) (Standard)	Solenoids 235	1.50
Manufacturing Skills (ME) (Standard)	Solid-State Relays and Starters 375	1.50
Manufacturing Skills (ME) (Standard)	SPC Overview 211	1.50
Manufacturing Skills (ME) (Standard)	Specs for Servomotors 330	1.50
Manufacturing Skills (ME) (Standard)	Spring Applications 220	1.50
Manufacturing Skills (ME) (Standard)	Statistical Process Control (SPC) Fundamentals	1.50
Manufacturing Skills (ME) (Standard)	Strategic Project Management (eBook)	1.50
Manufacturing Skills (ME) (Standard)	Strategies for Setup Reduction 251	1.50
Manufacturing Skills (ME) (Standard)	Surface Texture and Inspection 201	1.50
Manufacturing Skills (ME) (Standard)	Symbols and Diagrams for Motors 210	1.50
Manufacturing Skills (ME) (Standard)	The Forces of Fluid Power 110	1.50
Manufacturing Skills (ME) (Standard)	The Human Side of Lean	1.50
Manufacturing Skills (ME) (Standard)	Thread Standards and Inspection 151	1.50
Manufacturing Skills (ME) (Standard)	Timers and Counters 340	1.50
Manufacturing Skills (ME) (Standard)	Total Productive Maintenance 141	1.50
Manufacturing Skills (ME) (Standard)	Total Quality Management Overview 261	1.50
Manufacturing Skills (ME) (Standard)	Transforming Lean into Business Results 340	1.50
Manufacturing Skills (ME) (Standard)	Troubleshooting 181	1.50
Manufacturing Skills (ME) (Standard)	Troubleshooting Electrical Systems with Schematics	1.50
Manufacturing Skills (ME) (Standard)	TS 16949: 2009 Overview 221	1.50
Manufacturing Skills (ME) (Standard)	Understanding the Tools and Best Practices of	1.50

Manufacturing Skills (ME) (Standard)	Value Analysis and Value Engineering (VA/VE)	1.50
Manufacturing Skills (ME) (Standard)	Value Stream Mapping: Diagram the Information and	1.50
Manufacturing Skills (ME) (Standard)	Value Stream Mapping: The Future State 311	1.50
Manufacturing Skills (ME) (Standard)	Value Stream Mapping: The Present State 301	1.50
Manufacturing Skills (ME) (Standard)	Variable Frequency Drives	1.50
Manufacturing Skills (ME) (Standard)	Vision Systems 250	1.50
Manufacturing Skills (ME) (Standard)	What Lean Means (video)	1.50





**Training Proposal for:**  
**Unified Field Services Corporation**  
**Agreement Number: ET19-0350**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** J. Romero

**PROJECT PROFILE**

Contract Attributes:	SET Priority Rate Retrainee	Industry Sector(s):	Services (G) Construction (23)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Kern County	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Teamster Local Union 87; Carpenters 46 - Northern Ca Counties Conference Board - Local 1109; General Teamsters Union Local #431; Laborers Local 220; Cement Masons' Local 600; Laborers International Union of North America - Local Union 294		
Number of Employees in:	CA: 251	U.S.:251	Worldwide: 251
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
\$283,584

<b>Total ETP Funding</b>
\$174,720

**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, OSHA 10/30	168	8-200	0	\$1,040	\$22.77
				Weighted Avg: 40			

**Minimum Wage by County:** Job Number 1: SET Priority Industry Statewide Wage \$22.77.  
**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 \$2.50 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Project Control Staff		2
Quality Control Staff		8
Superintendent		13
Fleet Services		3
Foreman/General Foreman		7
Industrial Painter		50
Carpenter		55
Mason/Laborer		25
Office Administration Staff		5
<b>Total:</b>		<b>168</b>

**INTRODUCTION**

Founded in 2015 and headquartered in Bakersfield, Unified Field Services Corporation (UFSC) ([www.unifiedfsc.com](http://www.unifiedfsc.com)) provides industrial, mechanical, and civil construction services for the oil, gas, and energy industries all over California. Customers include oil and gas producers, pipeline operators, petro-chemical refineries, water utilities, civil infrastructures, power generators, renewable energy and other industrial sectors.

UFSC has the capability to provide beginning to end service needs in construction projects. Services include project planning and design, construction, budget and cost management, DOT operator qualification, bid/proposal evaluation, program and procurement management, purchasing and supplier management, and expediting material control. UFSC currently operates in 5 locations in California: Bakersfield, Santa Paula, Taft, Lost Hills and Avenal. This will be the Company’s first ETP Agreement.

## **PROJECT DETAILS**

The construction industry has become more sophisticated with highly technical equipment and processes, which makes finding highly skilled labor very difficult. UFSC must develop its workforce through training. The Company regularly provides training to employees to increase skills. Additionally, before employees are dispatched to start work at a jobsite, they must complete a detailed training course. Training will allow employees to evolve with the industry, allowing the Company to be at the forefront of new techniques, technology, designs, and materials. Training will cover specific techniques and applications required to meet customer needs.

Additionally, UFSC must streamline operations to be more competitive with other companies. The Company installed a new software system to streamline processes and operations. This system will eliminate downtime and increase production. Employees will also be cross-trained on different job skills. This will allow employees flexibility to work on different aspects of a project to minimize downtime.

### **Training Plan**

Training will be delivered via Class/Lab by in-house subject-matter experts and vendors, if necessary.

**Business Skills:** Training will be offered to Superintendents, Project/Quality Control Staff, Fleet Services, Office Administration Staff and Foremen/General Foremen. Classes will include communication skills, Project Management Certification (PMI), team building, contract writing – prime subcontracts, leadership, decisions making and problem solving among others. Training will improve internal operations (interpersonal skills, work relationships, morale, and corporate awareness), reduce turnover, and increase profitability.

**Commercial Skills:** Training will be offered to Superintendents, Office Administration Staff, Project Control Staff, Quality Control Staff, Foremen/General Foremen, Journeyman Craft, and Apprentice Craft. Classes will include fall protection, line breaking, welding, forklift operations, slings and rigging, and various equipment training. These courses will help the field team improve their individual skills, leading to lower costs and more profitable projects.

**Computer Skills:** Training will be offered to Superintendents, Office Administration Staff, Project Control Staff, Quality Control Staff and Foremen/General Foremen. Classes will include Microsoft Office 365, digital data management, and project controls – resource loading. Training will help project leads and superintendents to stay on track by adhering to timelines set for completing projects, minimizing the cost of labor and maximizing profitability.

**OSHA10/30** Training will be provided to all occupations. OSHA 500 and OSHA Focus Four will be provided to all construction related occupations. The purpose of this training is two-fold: ensuring that there are no unsafe practices occurring in the field that could endanger workers and ensuring that work won't be shut down due to a violation of either federal or state OSHA rules.

### **Union Support**

Teamster Local Union 87; Carpenters 46 Northern Ca Counties Conference Board Local 1109; General Teamsters Union Local 431; Laborers Local 220; Cement Masons' Local 600; and Laborers International Union of North America - Local Union 294 has provided letters of support for the training of union members.

## **Commitment to Training**

UFSC's annual training budget is \$435,000 spent on job specific training, general safety, diversity, new hire orientation and other mandatory training required for all employees. 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

USFC has a detailed training plan in place and is ready to start upon approval. The General Manager and the Health and Environment Safety Manager will oversee project administration. Training coordinators at each of the five training locations will oversee training at their respective locations and provide administrative support. The Company has also retained the services of a third-party subcontractor (Training Refund Group) to assist with administration.

## **Special Employment Training**

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. Trainees must earn at least the statewide average hourly wage of \$30.36 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. UFCS requests this wage modification from \$30.36 to \$22.77 (Job Number 1).

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

UCFS retained Training Refund Group (TRG) in Anaheim to assist with development of this proposal for a flat fee of \$5,000.

## **ADMINISTRATIVE SERVICES**

UCFS also retained TRG 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 – 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Team Building
- Contract Writing – Prime Subcontracts
- Leadership
- Decision Making and Problem Solving
- Client Relations – New Business Development
- Fleet and Fuel Management
- Safe Storage and Document Destruction
- Ergonomics
- HR solutions
- Accounting and Managing
- Project Controls – Project Accounting
- Office Management
- Project Management Certification
- Digital Data Management

**COMMERCIAL SKILLS**

- Hazardous Communications
- Personal Protection Equipment
- Asbestos
- Lead
- Confined Space
- Hydrogen Sulfide
- Fire Safety/Extinguishers/Hot Work/Atmospheric Monitoring
- Excavation & Trenching
- Fall Protection
- Behavior-based Safety
- Emergency Action Plans
- Heat Illness Prevention
- Driving Safety
- Illness and Injury Prevention Program
- Slings and Rigging
- Lock-out/Tag-out Energy Control
- Electrical Safety
- Incident Reporting
- Hazard Recognition
- Job Safety Analysis
- Blood Borne Pathogens
- Oilfield Passport
- Respiratory Protection Awareness
- Heavy Equipment Training
- Hand Tools/Hand Safety
- Hearing Conservation
- Spotter

- Confined Space Entrant and Attendant
- Line Breaking
- Crane Operation
- Oxygen Acetylene and Welding
- Forklift Operations
- Scaffold
- Bolt Up
- Coating
- Abrasive Blasting
- Forklift Operations
- Backhoe Operations
- Sideboom Operations
- Excavator
- Bobcat
- Competent Person for Excavations
- Supervisor Energy Control
- UFSC Supervisor Expectation
- Incident Investigation
- Job Site Safety Audit
- Small Tool Recovery
- Heat Illness Training
- Smith Driving Training
- USA Excavation Reporting
- Water Quality Standards
- Scheduling
- Quality Control

#### **COMPUTER SKILLS**

- Microsoft Office 365
- Microsoft Project- Resource Loading
- Digital Data Management

#### **OSHA 10/30**

- OSHA 10/30
- OSHA 500
- OSHA Focus Four

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



# TEAMSTERS LOCAL UNION 87

General Teamsters and Food Processing

Kern, Inyo & Mono Counties

Affiliated with the International Brotherhood of Teamsters

JOSEPH H. SUMLIN  
Secretary-Treasurer

Telephone (661) 327-8594  
Fax (661) 327-0931

2531 "G" Street  
Bakersfield, Calif. 93301

Application Review Unit  
Attn: Jela Romero  
1100 J. Street 4<sup>th</sup> Floor  
Sacramento, CA 95814

October 16, 2018

Subject: Application for Employment Training Panel – Unified Field Services Corporation

Dear ETP Panel Member:

The Teamsters Local 87 is in full support of Unified Field Services Corporations application for State training funds. With the demand for a highly skilled work force in the industrial petroleum sector, the additional training that Unified Field Services Corporation will be providing our members is value added. It is with the best interest of the Union and Company, that we train our members for the fast growing petroleum market that demands quality and safety. With the additional enhanced training that Unified Field Services Corporation will be providing our members, this will ensure the safety of the employees while adding value to the projects and clients.

Should you have any questions, please feel free to contact me at (661) 327-8594.

Sincerely,

  
John Moralez

Teamsters Local 87

cc. Teamsters Local 87

Joe Watkins, HES Manager & Company Liaison, Unified Field Services Corporation

John Stark, General Manager, Unified Field Services Corporation

# CARPENTERS

46 Northern California Counties Conference Board

**BILL FEYLING**  
Executive Director

October 8, 2018

John Stark  
General Manager  
Unified Field Services Corporation  
6906 Downing Avenue  
Bakersfield, CA 93308

## **RE: Employment Training Panel (ETP) Funding**


Dear Mr. Stark:

I am writing to you in reference to Unified Field Services Corporation's request for support of the Employment Training Panel Program, State Funded by the California Labor and Workforce Development that Unified Field Services Corporation wants to administer in their facility.

Please be advised that Carpenters 46 Northern California Counties Conference Board is in full support of such request based on the understanding and assurance that affected employees will be compensated as per the collective bargaining agreement.

Should you have any questions regarding this matter, please feel free to contact this office.

Sincerely,

  
William Feyling  
Executive Director

WF:jcm



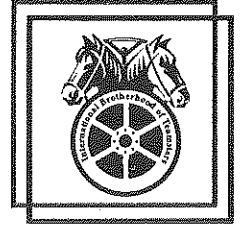
# GENERAL TEAMSTERS UNION LOCAL NO. 431

*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



October 5, 2018

Application Review Unit  
Attn: Jela Romero  
1100 J. Street 4<sup>th</sup> Floor  
Sacramento, CA 95814

Subject: Application for Employment Training Panel – Unified Field Services Corporation

Dear ETP Panel Member:

The Teamsters Local 431 is in full support of Unified Field Services Corporations application for State training funds. With the demand for a highly skilled work force in the industrial petroleum sector, the additional training that Unified Field Services Corporation will be providing our members is value added. It is with the best interest of the Union and Company, that we train our members for the fast growing petroleum market that demands quality and safety. With the additional enhanced training that Unified Field Services Corporation will be providing our members, this will ensure the safety of the employees while adding value to the projects and clients.

Should you have any questions, please feel free to contact me at (559) 486-5410.

Sincerely,

A handwritten signature in black ink, appearing to read "Peter Nunez", with a long horizontal flourish extending to the right.

Peter Nunez  
President  
Teamsters Local 431

cc: Teamsters Local 431  
Joe Watkins, HES Manager & Company Liaison, Unified Field Services Corporation  
John Stark, General Manager, Unified Field Services Corporation



# LiUNA!

## LOCAL 220

2201 "H" Street  
Bakersfield, CA 93301

Phone (661) 322-3460 • Fax (661) 281-1333

**HERTZ RAMIREZ**  
Business Manager

October 5, 2018

**ANTONIO MURILLO III**  
Secretary Treasurer

Application Review Unit  
Attn: Jela Romero  
1100 J. Street 4<sup>th</sup> Floor  
Sacramento, CA 95814

**MARIO SALINAS**  
President

Subject: Application for Employment Training Panel – Unified Field Services Corporation

Dear ETP Panel Member:

The Laborers Local 220 is in full support of Unified Field Services Corporations application for State training funds. With the demand for a highly skilled work force in the industrial petroleum sector, the additional training that Unified Field Services Corporation will be providing our members is value added. It is with the best interest of the Union and Company, that we train our members for the fast growing petroleum market that demands quality and safety. With the additional enhanced training that Unified Field Services Corporation will be providing our members, this will ensure the safety of the employees while adding value to the projects and clients.

**ANDY GARCIA**  
Vice President

Should you have any questions, please feel free to contact me at (661) 322-3460.

**FRED WALTHER**  
Recording Secretary

Sincerely,

**NOE AGUIRRE**  
E-Board Member

Hertz Ramirez  
Business Manager  
LiUNA! Local 220  
[hramirez@local220.us](mailto:hramirez@local220.us)  
(661) 322-3460

**JAMES SIMONEAU**  
E-Board Member

**JUAN ARREDONDO**  
Sergeant At Arms

cc. Laborers Local 220

Joe Watkins, HES Manager & Company Liaison, Unified Field Services Corporation

John Stark, General Manager, Unified Field Services Corporation



## CEMENT MASONS' Local No. 600



Operative Plasterers and Cement Masons  
International Association of the United States and Canada, AFL-CIO

5811 East Florence Ave.  
Bell Gardens, CA 90201-4685  
Phone 323/771-0991  
Fax 323/771-2631

October 8, 2018

Application Review Unit  
Attn: Jela Romero  
1100 J. Street 4<sup>th</sup> floor  
Sacramento, CA. 95814

Subject: Application for Employment Training Panel-Unified Field services Corporation

Dear ETP Panel Member:

The Plasterers and Cement Masons Union Local 600 are in full support of Unified Field Services Corporations application for State Training funds. With the demand for highly skilled work force in the Industrial petroleum sector, the additional training that Unified Field Services Corporation will be providing our members is value added. It is with the best interest of the Union and Company, that we train our members for the fast-growing petroleum market that demands quality and safety. With the additional enhanced training that Unified Services Corporation will be providing our members, this will ensure the safety of the employees while adding value to the projects and clients.

Should you have any questions, please feel free to contact me at (323) 816-0766  
Or by email: [bkfd191@hotmail.com](mailto:bkfd191@hotmail.com)

Sincerely,

Jaime Briceno  
Cement Masons  
Local 600

CC. Joe Watkins, HES Manager& Company Liaison, Unified Field Services Corporation  
John Stark, General Manager, Unified Field Services Corporation



# LiUNA!

Feel the Power

Laborers' International Union of North America  
Local Union 294

**James Hammond**

Business Manager/  
Secretary Treasurer

October 5, 2018

**Larry Mucker**

President

Application Review Unit

Attn: Jela Romero

1100 J. Street 4<sup>th</sup> Floor

Sacramento, CA 95814

**James Cantu**

Vice President

**Alan Shultz**

Recording Secretary

Subject: Application for Employment Training Panel – Unified Field Services Corporation

**Chris Sullivan**

SGT. at Arms

Dear ETP Panel Member:

The Laborers Local 294 is in full support of Unified Field Services Corporations application for State training funds. With the demand for a highly skilled work force in the industrial petroleum sector, the additional training that Unified Field Services Corporation will be providing our members is value added. It is with the best interest of the Union and Company, that we train our members for the fast-growing petroleum market that demands quality and safety. With the additional enhanced training that Unified Field Services Corporation will be providing our members, this will ensure the safety of the employees while adding value to the projects and clients.

**Charles Inabnit**

**Gary Beintker**

**Gary Deaver**

Executive Board

Should you have any questions, please feel free to contact me at (559) 255-3019.

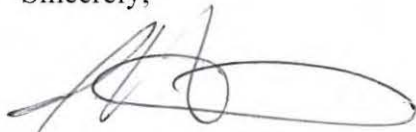
**Richard Zanin**

**Jose Ponce**

**Miguel Lunar**

Auditors

Sincerely,



James Hammond  
Laborers Local 294

**FRESNO OFFICE**

5431 E. Hedges

Fresno, CA 93727

559-255-3019 Phone

559-255-7898 Fax

**VISALIA OFFICE**

319 N. Church

Visalia, CA 93277

559-734-9426 Phone

559-734-2510 Fax

cc. Joe Watkins, HES Manager & Company Liaison, Unified Field Services Corporation  
John Stark, General Manager, Unified Field Services Corporation



**Training Proposal for:**

**Yuba Shasta UA Local 228 Joint Apprenticeship and Training Committee**

**Agreement Number: ET19-0935**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Mam

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Apprenticeship Veterans	Industry Sector(s):	Construction (C)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Northern California	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No UA Local Union 228		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤0%		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$140,340		\$9,715 8%		\$150,055

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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**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 Journeyman	Commercial Skills, OSHA 10/30	25	4-200	0	\$667	\$22.77
				Weighted Avg: 24			
2	Retrainee Priority Rate Apprentice	Commercial Skills, OSHA 10/30	49	8-210	0	\$2,470	\$22.77
				Weighted Avg: 110			
3	Retrainee Priority Rate Apprentice Veterans	Commercial Skills, OSHA 10/30	5	8-210	0	\$2,470	\$22.77
				Weighted Avg: 110			

**Minimum Wage by County:** \$22.77 per hour Statewide Average Modified Wage.  
**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 for Job Number 2 & 3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Journeyman: Plumber, Maintenance Plumber, Steamfitter/Pipefitter, HVAC Mechanic		25
Apprentice: Plumber, Maintenance Plumber, Steamfitter/Pipefitter, HVAC Mechanic		49
Veteran/Apprentice: Plumber, Maintenance Plumber, Steamfitter/Pipefitter, HVAC Mechanic		5

**INTRODUCTION**

Founded in 1997 and headquartered in Marysville, the Yuba Shasta UA Local 228 Joint Apprenticeship and Training Committee (Yuba Shasta JATC) (<http://lu228.org/yuba-shasta-jatc-training/>) has trained apprentices and journeymen from 13 Northern California counties in the plumbing, pipefitting, welding, and Heating, Ventilation and Air Conditioning (HVAC). Committee members are jointly appointed by Local 228 and the Mechanical Contractors Council of Southern California. The JATC works with the Yuba County Office of Education as its Local Educational Agency (LEA) to deliver Related and Supplemental Instruction for each trade.

Yuba Shasta JATC apprentices and journeymen install, repair, maintain, and service piping and plumbing systems and equipment used for drinking (potable) water distribution, sanitary storm water systems, and waste disposal. They also work on technical installations for medical gas, hydronic in-floor heating, solar panels, heat pumps, cross-connection control and many other systems. Their work is found mostly in the new home building and renovation, and commercial

construction sectors including hospitals schools and other institutional buildings. This is Yuba Shasta JATC's third Contract, third in the last five years.

### **Veterans Program**

Yuba Shasta 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.

Also, the Veterans in Piping (VIP) Program, offered by the National UA, offers high-quality skills training and jobs in the pipe trades to active duty military personnel preparing to leave the service. The UA provides participants with additional skills training opportunities after Veterans complete the program by connecting them to established apprenticeship training programs. When they enter a local UA, Veterans are given credit for the classes they have already taken.

### **Apprenticeship Program**

The Panel funds 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 supplements cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the program is four years.

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 \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

## **PROJECT DETAILS**

Training is center-based. Training will cover plumbing and piping equipment, updated building standards, and green business practices necessary to meet commercial interest. Training will expand worker's skills in preparation for new projects including: Fire Mountain Casino in Wheatland, new hospitals in Alturas and Fall River Mills, and a new science building at California State University of Chico.

### **Training Plan**

All class/lab training will be delivered at Yuba Shasta JATC's headquarters in Marysville. Instructors have extensive technical expertise, training experience, and meet standards set by the LEA.

**Commercial Skills:** Training will be provided to Journeymen and Apprentices on installation and maintenance efficiencies, sanitary systems, work safety and waste disposal. Training will include topics such as Pipe Fabrication/Layout, Welding Practices and Procedures, and Medical Gas Brazer Certification. Training will also help apprentices gain the knowledge and skills necessary to become journey level.

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 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.

### **Minimum Number of Training Hours**

The minimum number of training hours provided during the contract term is typically eight hours. However, Yuba Shasta JATC is requesting a decrease to the minimum number of hours, from eight to four training hours for Journeymen.

Journeymen are required to take 4-hour refresher courses such as Medical Gas Installer and Brazer, Industrial Rigging, and Crane Signalperson in order to keep their certification through the National Inspection Testing and Certification Corporation. Many of Yuba Shasta JATC’s Plumbers require only this course over the next two-year contract, and would be ineligible for ETP reimbursement under the current eight hour minimum requirement. Based on the necessity of the certification, staff recommends reducing the minimum number of training hours to four for Journeymen trainees.

### **Commitment to Training**

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

#### ➤ Training Infrastructure

The Training Coordinator and an Administrative Assistant, who were directly involved in the previous ETP Contract, will be responsible for coordinating training and reviewing attendance rosters for ETP compliance. Yuba Shasta JATC employs 8 part-time trainers who will deliver all training. Yuba Shasta JATC has also contracted with Strategy Workplace Communications to provide administrative services for the ETP Contract.

### **Impact/Outcome**

Certifications earned for the journeyman and apprentice training include: OSHA 10/30, Medical Gas Installer, Medical Gas Brazer, Foreman’s Certification, Industrial Rigger Certification, Crane, Signalperson Qualification and various welding certifications. Apprentices are working towards a certificate from Division of Apprenticeship Standards that will allow them to work at the higher paid journeyman level.

### **Marketing and Support Costs**

Yuba Shasta JATC disseminates class information throughout the year to potential trainees within JATC jurisdictions as well as to contractors who employ them through direct mailings, personal contacts, telephone calls, public service announcements, emails, and its website. The JATC is also active in the local workforce investment board and is a partner in its community workforce development work.



Yuba Shasta JATC request 8% support costs to fund its staff in recruiting and qualifying additional participating employers for this program. While many participating employers have already been recruited, additional recruitment and assessment activities are necessary. Staff recommends 8% support costs.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

The following table summarizes Yuba Shasta JATC's performances under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0922	Yuba City	03/01/2016- 02/28/2018	\$40,468	\$40,468 (100%)
ET13-0921	Yuba City	01/28/2013- 01/27/2015	\$131,666	\$40,526 (31%)

\*ET13-0921: The JATC attempted to administer the contract without a subcontractor. However, during the term of the contract, the person overseeing training left the JATC. The new administrator was unable to log training hours or distinguish eligible training. Towards the end of the contract, Strategy Workplace Communication was hired to help administer training; however, performance was impacted by the departure of the person overseeing training.

### **DEVELOPMENT SERVICES**

California Labor Federation in Sacramento assisted with development at no cost.

### **ADMINISTRATIVE SERVICES**

Strategy Workplace Communication in Alameda will 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****JOURNEYMAN TRAINING**

4-200

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- ✚ A Guide to Service Work
- ✚ Advanced Plan Reading and Drawing
- ✚ Basic Electricity
- ✚ Confined Space Certification
- ✚ Conservation Safe Handling of Refrigerants
- ✚ Crane Signalperson Certification
- ✚ Drainage Systems
- ✚ Drawing & Blue Print Reading
- ✚ Gas Installation
- ✚ Gas Tungsten Arc Welding
- ✚ Green Awareness/Technology
- ✚ HVAC and Refrigeration Systems 1
- ✚ HVAC and Refrigeration Systems 2
- ✚ Hydronic Heating and Cooling
- ✚ Industrial Rigging 410
- ✚ Industrial Rigging Certification
- ✚ Job Safety
- ✚ Medical Gas Brazer Certification
- ✚ Medical Gas Installer Certification
- ✚ Oxyfuel Practices
- ✚ Oxyfuel Welding and Shield Arc Processes
- ✚ Pipe Fabrication/Layout
- ✚ Pipe Fittings Valves Fasteners
- ✚ Plumbing Code Applications
- ✚ Plumbing Fixtures and Appliances
- ✚ Plumbing Service Maintenance and Repairs
- ✚ Pumps
- ✚ Refrigeration Service/AC Mechanics
- ✚ Related Mathematics
- ✚ Related Science
- ✚ Soldering and Brazing
- ✚ Steam Systems
- ✚ Tube Bending
- ✚ Water Supply
- ✚ Welding Practices and Procedures

**OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)**

- ✚ OSHA 10
- ✚ OSHA 30

**APPRENTICE TRAINING**

8-210

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- ✚ A Guide to Service Work
- ✚ Advanced Plan Reading and Drawing
- ✚ Basic Electricity
- ✚ Confined Space Certification
- ✚ Conservation Safe Handling of Refrigerants
- ✚ Crane Signalperson Certification
- ✚ Drainage Systems
- ✚ Drawing & Blue Print Reading
- ✚ Financial Literacy for Apprentices
- ✚ Gas Installations
- ✚ Gas Tungsten Arc Welding
- ✚ Green Awareness/Technology
- ✚ Heartsaver CPR, 1<sup>st</sup> Aid, AED Training & Certification
- ✚ HVAC and Refrigeration Systems 1
- ✚ HVAC and Refrigeration Systems 2
- ✚ Hydronic Heating and Cooling
- ✚ Industrial Rigging 410
- ✚ Industrial Rigging Certification
- ✚ Job Safety
- ✚ Medical Gas Brazing Certification
- ✚ Medical Gas Installer Certification
- ✚ Oxyfuel Practices
- ✚ Oxyfuel Welding and Shield Arc Processes
- ✚ Pipe Fabrication/Layout
- ✚ Pipe Fitting Valves Fasteners
- ✚ Plumbing Code Applications
- ✚ Plumbing Fixtures and Appliances
- ✚ Plumbing Service Maintenance and Repairs
- ✚ Pumps
- ✚ Refrigeration Service/AC Mechanics
- ✚ Related Mathematics
- ✚ Related Science
- ✚ Soldering and Brazing
- ✚ Standards of Excellence
- ✚ Steam Systems
- ✚ Tube Bending
- ✚ Use and Care of Tools
- ✚ Water Supply
- ✚ Welding Practices and Procedures

**OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)**

- OSHA 10
- OSHA 30

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

Note: Reimbursement for retraining is capped at 200 total training hours for Job Number 1 and 210 total training hours for Job Numbers 2 & 3 per trainee, regardless of the method of delivery.



**Training Proposal for:**  
**AHMC Whittier Hospital Medical Center LP**  
**Agreement Number: ET19-0338**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:**North Hollywood

**Analyst:** M. Paccereilli

**PROJECT PROFILE**

Contract Attributes:	SET Retrainee Priority Rate Medical Skills Training Job Creation Initiative	Industry Sector(s):	Services (G) Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No California Nurses Association		
Number of Employees in:	CA: 585	U.S.:585	Worldwide: 585
Turnover Rate:	19%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
\$956,677

<b>Total ETP Funding</b>
\$420,368

**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	Continuous Improv., Computer Skills, MST Didactic, MST Preceptor, Commercial Skills	457	8 - 200	0-8	\$884	\$22.77
				Weighted Avg: 34			
2	Retrainee SET Priority Rate Medical Skills Job Creation	Continuous Improv., Computer Skills, MST Didactic, MST Preceptor, Commercial Skills	15	8 - 200	0-8	\$1,092	\$14.62
				Weighted Avg: 42			

**Minimum Wage by County:** Job Number 1: \$22.77 per hour Statewide; Job Number 2: \$14.62 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

Job Number 1: Up to \$2.50 per hour may be used to meet the Post-Retention Wage.

Job Number 2: Up to \$1.62 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>JOB NUMBER 1:</b>		
Registered Nurse (RN)		260
Licensed Vocational Nurse (LVN)		15
Pharmacist		8
Technician		87
Ancillary Support Staff		48
Administrative Staff		39
<b>JOB NUMBER 2:</b>		
Registered Nurse (RN)		10
Pharmacist		1
Technician		2
Ancillary Support Staff		1
Administrative Staff		1

## **INTRODUCTION**

Founded in 1957, AHMC Whittier Hospital Medical Center LP (Whittier Hospital) ([www.whittierhospital.com](http://www.whittierhospital.com)) is a community-based acute care hospital with 178 licensed beds. Its services include emergency, critical care, general surgery, medical/surgical, telemetry, pediatric subacute, obstetric care, nursery, laboratory, outpatient services, rehabilitation services (physical therapy, occupational & speech), and imaging services. As part of its community outreach, the Hospital offers programs in wellness, diabetes and stroke awareness. Whittier Hospital is a wholly-owned subsidiary of AHMC Healthcare, Inc., but it operates as a Limited Partnership autonomous from other AHMC hospitals in the state.

The proposed training will focus on patient care experience, patient flow and efficiency; advanced employee job skills, and maintaining a high performance workplace. Whittier Hospital has provided a letter of support from the California Nurses Association, which represents the Registered Nurses in this proposal.

## **PROJECT DETAILS**

This will be Whittier Hospital's sixth ETP Agreement, its fourth within the last five years. The proposed training differs from and/or expands on training delivered in prior ETP projects. Training will focus on new initiatives and programs recently implemented and/or continuing from the previous contract as follows:

- Pain Management/Opioid Crisis - With the current opioid crisis situation, there is a need to educate trainees on its updated pain management standards. There will be new procedures addressing the comprehensive assessment of pain, reassessment, treatment and referral options. These will include strategies to reduce opioid use and also minimize potential adverse outcomes associated with the use of opioid and emphasis on non-pharmacological treatments of pain management, overdose protection programs.
- Suicide/Ligature Risk Training and Prevention - This new initiative will focus on establishing and maintaining safe and functional environments to patients at risk for suicide or self-harm. New initiatives include the implementation of a new evidence-based assessment tool (Columbia-Suicide Severity Rating Scale), rapid interventions needed for patients screened as high risk for suicide, environmental ligature risk assessments, de-escalation and assaultive behavior management, and the need for monitoring patients to ensure safe discharge or transfer to appropriate facilities with resources for the patient and family.
- Emergency Department/Pediatric Readiness program – There is a 20% increase in pediatric patients in its Emergency Department. To address this increase, Whittier Hospital participated in the Los Angeles County Pediatric Readiness Program to ensure that the hospital is delivering high quality care to its pediatric population.

- **Electronic Medical Record Conversion/Meaningful Use** - Whittier Hospital is continuing its effort to convert from paper to computer charting. Training started in the prior contract and is currently at 75% compliant with its Computerized Physician Order Entry. Additional training is needed to address new patient portal requirements and the ability to communicate with patients via Electronic Health Record after discharge and clinical information reconciliation. The hospital also plans to expand its barcoding capability to its Labor and Delivery and Perioperative areas. This technology will enable the hospital to match the right patient with the right medication and adds safety guardrails to prevent human error.
- **Safe Patient Handling** –This initiative will focus on the elimination of manual patient lifting and to implement a proactive patient handling program that focuses on the safety and well-being of all healthcare workers, promoting safe work practices and ensuring that appropriate lifting practices are applied coupled with proper body mechanics.
- **Workplace Violence Prevention** - With the increase in its psychiatric patient population, especially in the Emergency Department, training will focus on dealing with patients, recognizing and de-escalating potential violence; and strategies to avoid harm from violent situations.

Although some course titles may be similar as in prior projects, Whittier Hospital confirmed that there is no duplication of training and the curriculum has been updated and/or changed.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

Whittier Hospital will hire 15 new employees (Job Number 2). The hospital has experienced an increase in surgical volume in its Perioperative Department and an overall increase in patient visits through its Emergency Department. These new employees are needed to support the Hospital's expanding patient care and new shifts added to the Perioperative, Postpartum, and Emergency Departments.

The date-of-hire for 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**

**Computer Skills**- Training will be offered to all occupations and will cover various healthcare software solutions including electronic medical records, medication management and data analysis tools.

**Continuous Improvement** - Training will be offered to all occupations and will focus on performance and quality of care improvements. Training will also include communication skills, time management, frontline leadership skills, conflict resolution, and case management.

**Medical Skills Training (Didactic and Clinical with Preceptor)** - Training will be offered to all nurses and healthcare professionals and will address deficiencies in specific skills to ensure trainees are competent in advanced medical procedures. Training will focus on the proper use of equipment, sterilization and instrumentation, medical terminology, infection control, patient

handling, and medical coding. Registered Nurses and Licensed Vocational Nurses will receive both Didactic and Clinical with Preceptor training. Pharmacists and Technicians may receive Didactic training based on their respective job duties.

**Commercial Skills** – Training will be delivered as Computer-Based Training (CBT) to nurses and healthcare professionals in industry-specific skills such as blood transfusion and medication safety.

### Special Employment Training

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

### Commitment to Training

ETP funds will not displace the existing financial commitment to training. Whittier Hospital estimated that it spent approximately \$1.4 million on training in the last fiscal year. 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.

#### ➤ Training Infrastructure

This project will be a shared responsibility of the Human Resources Director, Chief Nursing Officer, Director of Education and their respective administrative assistants and staff (six in-house employees). Training will begin upon ETP approval and will be delivered by the Education Department who are subject matter experts. A vendor has been retained to assist with administration and ensure that all training records meet ETP compliance.

### 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	
				\$	%
ET17-0180	Whittier	09/01/18 - 08/31/18	\$421,524	*\$421,524	
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%)

\*The Contractor is in the process of submitting a Final Closeout Invoice. Based on the ETP Systems, 33,615 reimbursable hours have been tracked for potential earnings of \$421,524 (100% of approved amount) Contractor anticipates earning 100% of training funds.



**DEVELOPMENT SERVICES**

Training Funding Source (TFS) in Seal Beach assisted with the development of this project for an estimated flat rate of \$8,500.

**ADMINISTRATIVE SERVICES**

TFS will also perform administrative services for a fee not to exceed 8% 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 (ACLS)
- ✚ Arterial Blood Gas (ABG) Interpretation
- ✚ Basic Life Support (BLS)
- ✚ 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)
- ✚ 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 Advanced Life Support (PALS)
- ✚ 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 (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

### **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.



*A Voice for Nurses. A Vision for Healthcare.*



OAKLAND  
155 Grand Avenue  
Oakland CA 94612  
phone: 800-504-7859  
fax: 510-663-1625

LOS ANGELES  
225 West Broadway  
Suite 500  
Glendale CA 91204  
phone: 818-240-1900  
fax: 818-240-8336

October20, 2018

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

Re: Union Support for ETP Funding

Dear Mr. Knox:

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

Sincerely,

*Antoinette McDaniel*

Antoinette McDaniel  
CNA Labor Representative  
California Nurses Association-National Nurses United



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**AppFolio, Inc.**

**Agreement Number: ET19-0345**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** L. Vuong

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Services (G) Professional, Scientific Technology (54)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Santa Barbara, San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 587	U.S.: 880	Worldwide: 880
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	11%		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$368,935

<b>Total ETP Funding</b>
\$274,066

**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	557	8-200	0	\$338	\$16.70
				Weighted Avg: 13			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Computer Skills	100	8-200	0	\$858	\$13.66
				Weighted Avg: 33			

**Minimum Wage by County:** Job Number 1: \$16.70 per hour for Santa Barbara County and \$17.03 per hour for San Diego County  
 Job Number 2 (Job Creation): \$13.66 per hour for Santa Barbara County and \$14.19 per hour for 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
<b>Job Number 1</b>		
Engineer		144
Customer Support Staff		138
Sales & Marketing Staff		94
Services Staff		67
Administrative Staff		62
Manager		52
<b>Job Number 2 (Job Creation)</b>		
Engineer		40
Customer Support Staff		16
Sales & Marketing Staff		18
Administrative Staff		8
Manager		18



## **INTRODUCTION**

Founded in 2006, AppFolio, Inc. (AppFolio) ([www.appfolioinc.com](http://www.appfolioinc.com)) designs and develops cloud-based software solutions for the real estate and legal markets. AppFolio's products and services address the unique requirements of property management companies which manage single- and multi-family residences, commercial properties, community associations, student housing, as well as solo legal practitioners and small law firms. AppFolio's software solutions are built using a modern cloud-based architecture, and are designed for use across multiple devices and operating systems. The Company focuses on revolutionizing businesses by providing easy-to-use software and services which help customers automate business processes, streamline operations, save time grow their businesses.

Headquartered in Goleta, the Company has two facilities in California (Goleta and San Diego), and facilities in Texas and Massachusetts. The Goleta and San Diego facilities will participate in this proposal. This will be AppFolio's first ETP Agreement.

### **Veterans Program**

AppFolio works hard to find the best team members to join the Company – including Veterans. However, the Company is not requesting specific inclusion of Veterans in this program.

## **PROJECT DETAILS**

AppFolio is operating in a highly competitive technology industry. The Company is continually striving to meet customers' expectations and demands by delivering the best software solutions and services. Its goal is to provide workers with the necessary business and technical skills required to develop and market new product and service offerings, ensure high-quality customer service and support, maintain and expand operations, adapt to new technology, and support growth. AppFolio must also train its workforce to operate, maintain, and support complex systems and sophisticated technology. Training will enhance job security, providing employees with the necessary tools to be successful in their jobs and contribute to the Company's success.

AppFolio faces many challenges that drive the need for training:

- Developing and marketing new products and services and improving existing offerings;
- Meeting customer demands;
- Integrating and supporting new product offerings such as WegoWise, which provides property managers with timely, insightful information to help manage energy and water usage, understand, track and improve building efficiency;
- Keeping up with technological advances and changes in industry requirements;
- Expanding leadership development programs such as the recently launched AppFolio Leader Lab; and
- Expansion of existing facilities, including leasing and building out of additional office space (lease signed on July 27, 2018, for ten year term).

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. These trainees will be hired into "net new jobs" as a condition of contract.

AppFolio delivered 36% annual revenue growth in 2017 and expects growth of 30% for 2018. The Company will hire 150 new employees at its Goleta and San Diego facilities. However, the Company is asking for funding to train 100 new employees (Job Number 2). Growth in business, new product offerings, and expansion of facilities require retraining of existing employees, combined with the hiring and training of new employees to keep up with the increase in business and service level. AppFolio has hired 61 new employees in California since July 1, 2018.

## **Training Plan**

Classroom/Laboratory and Videoconference training will be provided in the following:

**Business Skills:** Training will be offered to all occupations and focus on customer service, team building, product knowledge, organization and overall business functions to improve job performance.

**Computer Skills:** 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 operation systems to provide efficient and effective customer service and implement necessary software including WegoWise.

## **Commitment to Training**

AppFolio has an annual training budget of approximately \$664,000 for Goleta and San Diego. Training consists of new hire orientation, mandated training, extensive and basic computer skills, leadership and product knowledge. Training is delivered via class/lab and GoToMeeting, and all training is both job specific and Company-wide.

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

### ➤ Training Infrastructure

Training will begin upon Panel approval. The Sr. People Development Manager will oversee all project administration. AppFolio has designed a team that includes a Chief People Officer, a HR Manager and a Coordinator at each location to oversee ETP training and administrative responsibilities. The Company has also retained a third party to assist with administrative duties. Training will be delivered by in-house experts and vendors as needed.

## **Green/Clean Operations**

AppFolio is committed to company growth, while also implementing Green/Clean technology. The Company offers software and solutions to help customers manage energy and water usage to save resources, time and money.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

Glendale Community College, Professional Development Center (Glendale Community College) in Montrose assisted with development for a flat fee of \$5,000.

**ADMINISTRATIVE SERVICES**

Glendale Community College will also perform administrative services for a fee not to exceed 12% of payment earned.

**TRAINING VENDORS**

To Be Determined

## **Exhibit B: Menu Curriculum**

### **Class/Lab/Videoconference Hours**

8-200

Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Agile & Lean Methodologies
- Business, Financial & Organizational Acumen
- Business Administration
- Business Strategy
- Career Development
- Change Management
- Client Services Training
- Collaboration & Teamwork
- Communication Skills & Styles
- Contact Center Training
- Culture & Values
- Customer Research & Product Design Skills
- Customer Service & Listening
- Difficult Conversations/Productive Interactions
- Engineering & Product Training
- Entrepreneurship
- Human Resources Management
- Interviewing Skills
- Leadership
- Marketing Skills
- Market Validation
- Net Promoter Score
- New Manager Training
- Performance, Coaching & Feedback
- Presentation Skills
- Product Management
- Product Training
- Productivity & Time Management
- Project Management
- Quality Assurance
- Research Skills
- Sales Training
- Security Operations
- Web Operations
- Welcome to AppFolio (Products and Services)

#### **COMPUTER SKILLS**

- Adobe Suite
- BambooHR
- Business Systems
- Coupa
- Client Services Software
- Customer Experience Software

- Dropbox
- Facilities Software
- Finance Software
- Git
- Google Suite
- GoToMeeting/GoToWebinar
- Human Resources Software
- Hyperion
- IT Software
- JavaScript
- Jhana
- Jira
- MacOS Basics
- Marketing Systems & Software
- Mobile Devices
- NewRelic
- Nexonia
- Office365
- Okta
- Peakon
- Pluma
- Product Development Systems & Tools
- React
- Ruby on Rails
- Rubymine
- Sales Software
- Salesforce
- Selenium & Page Objects
- Slack
- SQL
- Teamcity
- Veelo
- Web Design & Operations Tools

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



**Training Proposal for:**

**West Coast MediaNews LLC dba California  
Newspapers Partnership**

**Agreement Number: ET19-0343**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Reeves

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing (E) Information / Multi Media (51)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, Butte, Contra Costa, Humboldt, Lake, Los Angeles, Marin, Mendocino, Orange, Riverside, San Bernardino, San Mateo, Santa Clara, Santa Cruz, Solano, Tehama, Yolo	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Pacific Media Workers Guild Local 39521		
Number of Employees in:	CA: 1,456	U.S.: 3,146	Worldwide: 3,146
<u>Turnover Rate:</u>	17%		
<u>Managers/Supervisors:</u> (% of total trainees)	20%		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$960,840

<b>Total ETP Funding</b>
\$884,000

**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., Mfg. Skills	1,000	8-200	0	\$884	\$16.70
				Weighted Avg: 34			

**Minimum Wage by County:** \$18.22 per hour for Alameda, Contra Costa, Marin, and Santa Clara counties; \$17.54 per hour for Los Angeles County; \$17.50 per hour for Orange County; and \$16.70 per hour for Butte, Humboldt, Lake, Mendocino, Riverside, San Bernardino, Santa Cruz, Solano, Tehama and Yolo 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 \$2.50 per hour may be used to meet the Post-Retention Wage.

There will be approximately 160 salespeople, account managers, and advertising/telemarketing staff who earn commission in addition to their base wages. Commission income from \$5.38 - \$18.22 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Support/Finance/Accounting Staff		40
IT Professional, Technician, Project Manager		30
News Staff 1: Editor, Photographer, Reporter, Circulation Staff		180
Graphic Artist, Designer, Editorial Staff		50
Advertising/Digital Media Staff		200
Sales/Marketing/Telemarketing Staff		150
Account Manager, Account Executive		150
Manager/Technical Director		60
Supervisor		140

**INTRODUCTION**

Founded in 1999 and headquartered in San Jose, West Coast MediaNews LLC dba California Newspapers Partnership (CNP), is a subsidiary of Media News Group. CNP is the largest publisher of daily and weekly newspapers in California. Through its statewide network of newspapers and websites, CNP provides news and information to readers, as well as marketing and advertising opportunities for businesses. In this proposal, training will be delivery to CNP

staff, and workers employed at two additional news publishing affiliates: California Newspapers Limited Partnership and the Los Angeles Daily News Publishing Company. CNP and its affiliates publish a variety of daily and weekly publications from approximately 53 locations statewide, all of which will participate in this training.

This will be CNP's fourth ETP Contract, and third within the past five years. Previous training focused on training initiatives in response to new business acquisitions involving the Orange County Register and the Riverside Press-Enterprise. This proposal includes employees who may have participated in a prior contract. There may be some reoccurring Curriculum topics; however, all subject matter has been updated and/or modified due to changes in business demand and media technology. There will be no duplication of training.

### **Veterans Program**

CNP does not have a formal program in place for Veteran recruitment; however, the Company does employ Veterans through its normal hiring practices.

### **Union Support**

The Pacific Media Workers Guild Local 39521 has provided a letter of support for the training of its union members.

### **PROJECT DETAILS**

The news publishing industry continues to experience declines in print news subscriptions and advertising dollars. CNP's goal is to ensure that the growth of its digital audience and advertising revenues make up for the losses on the print side of its business. The rapidly changing digital landscape requires CNP to provide continuous training on new platforms and strategies. Therefore, CNP is requesting ETP funding to support the training necessary to continue building the digital skills of its editorial, sales and marketing employees.

CNP must centralize operations, processes and procedures to function more efficiently. Employees must be trained across all departments on essential processes to improve their ability to engage content audiences through video, digital photography, audio recordings and data visualizations. Comprehensive skills training will enhance the Company's ability to produce, edit, and post content on an around-the-clock basis. The Company also recently invested over \$2 million in new Salesforce CRM customer relationship management technology designed to enhance productivity, customer relations and analysis, data management, sales and marketing.

### **Training Plan**

**Business Skills:** Training will be offered to all occupations and focus on product knowledge, support skills, and technical expertise to identify and resolve problems more efficiently. Topics will include product knowledge, marketing and support, presentation skills, account management, sales and product advertising.

**Computer Skills:** Training will be offered to all occupations to support CNP's next generation of digital media products. Training will continue to focus on the implementation of digital media content for CNP's web and mobile-based audience. The Company's editorial team will receive training on advanced analytic platforms, social media management and search engine optimization to help boost news content.

**Continuous Improvement:** Training will be offered to all occupations and include customer service, communication, best practices, project management and process improvements.



Members of CNP's leadership team will continue to develop their leadership and coaching skills to reduce costs, improve efficiencies, and increase productivity.

**Manufacturing Skills:** Training will be offered to Technicians and Circulation Staff. Training will focus on workflows for new and existing print products to improve the efficiency of printing and circulating products at a lower cost.

### **Commitment to Training**

CNP had a training budget of approximately \$965,000 for all of its California facilities. Training includes new-hire orientation, compliance training, temporary worker training, basic computer skills, sexual harassment prevention, and executive development programs. Safety training is provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

The Corporate Training Manager will oversee administration of this project. CNP's internal training team will coordinate, schedule and document training across all 58 participating locations. As reflected by performance on prior ETP projects, the Company has a solid foundation of project personnel at each location to facilitate the successful delivery of training. CNP has also retained an outside administrative consultant to assist with administrative duties. Training will be delivered by in-house experts and vendors as needed.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

The following table summarizes CNP's performance under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0463	Various	06/01/16 – 05/31/18	\$743,688	\$743,688 (100%)
ET14-0202	Various	12/30/13 – 12/29/15	\$504,000	\$504,000 (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/E-Learning Hours

8 - 200

Trainees may receive any of the following:

#### **COMPUTER SKILLS**

##### **All Departments**

- Computer and/or Internet Navigation
- Digital News Platforms
  - E-Editions, Mobile Sites and Applications
- Google Business Applications
- Email, Calendars, and Document Management and Distribution
- Microsoft Programs (Advanced/Intermediate)
- Workday
  - End User
  - Supervisory Roles
  - Administration
- Shortel Telecommunications
- JD Edwards Expense Management
- AMEX Expense Management
- Digital Skills
- Digital Platforms

##### **Editorial**

- Website Management
  - Interfaces, Design and Content Management
- Social Media Management and Marketing for Content
- Search Engine Optimization for Publishing
- Search Engine Marketing for Publishing
- Google for Publishing
  - Mapping
  - Analytics
- Video Production for News Content
- Video Distribution Platforms for News Content
- Mobile Devices For Publishing (Smartphones/Tablets)
- Desktop/Online Applications/Programs for Publishing
- Saxotech
- WordPress
- Design and Editing Programs/Applications for Content Publishing
- Design and Editing Programs/Applications for Photo Editing
- Database Management Tools for News Content or Audience Development
- Data Content Management and Analytics
- Multimedia Tools

##### **Finance**

- Salesforce - Financial Reporting
- BPC - Financial Reporting
- JDE- AP, Purchasing and GL
- Mactive/Adbase - Advertising A/R System
- COGNOS - Report Writer for Mactive

**Advertising**

- SalesForce
  - Customer Relationship Management
  - Digital Advertising Fulfillment
- Google Analytics for Marketing and Advertising
- Social Media Management and Marketing for Advertising
- Search Engine Optimization for Marketing and Advertising
- Search Engine Marketing for Marketing and Advertising
- Video Production for Marketing and Advertising
- Video Distribution Platforms for Marketing and Advertising
- Audio Production for Marketing and Advertising
- Audio Distribution for Marketing and Advertising
- Mobile Devices For Marketing and Advertising (Smartphones/Tablets)
- Desktop/Online Applications/Programs for Marketing and Advertising Management
- Database Management for Marketing and Advertising
- ECommerce

**Circulation**

- DIT (Newscycle Solutions Database)
- W Drive
- Marketing G2 Applications
- Call Center Systems & Tools

**Human Resources**

- Payroll & HR System Training
- Applicant Tracking System

**IT/IS - Sales/Marketing, Administrative and Content Professionals**

- IT Solutions
- Computer Programming
- Database Tools
- Information Security
- MIS - Management Information Systems
- Network Administration
- System Analysis
- Technology Support
- Website Design and Development

**CONTINUOUS IMPROVEMENT**

- Customer Service
- Communications Skills
- Best Practices
- Conflict Management
- Creativity and Innovation
- Team Work
- Project Management
- Process Improvements
- Marketing Communications
- Strategic Implementation
- Strategic Planning
- Project Management
- Telephone Skills

- Budgeting Techniques
- Flash Reporting

### **Editorial**

- Writing for Journalists
- Advanced Writing for Journalists
- Reporting with Data
- Broadcast Techniques

### **Leadership & Coaching**

- Leadership Skills
- Performance Management
- Change Management
- Conflict Management
- Communication Skills
- Managing Managers
- Delegating
- Listening
- Team Building and Development
- Problem Solving
- Process/Quality Improvement
- Decision Making
- Identifying Problems/Presenting Solutions
- Leading in a Matrix Environment
- Time and/or Project Management
- Coaching
- Situational Leadership
- Negotiation Skills
- Navigating Difficult Conversations
- Financial Reporting and Budgets
- Training Facilitation
- On-Boarding
- Succession Planning
- Strategic Planning and Execution
- Finance for non-Finance Managers
- Project Management

### **BUSINESS SKILLS**

- On-boarding Newspaper Processes
- Department Processes
- Product Knowledge
- Product Marketing and Support
- Consultative Sales Skills (Prospecting and Identifying Needs)
- Proposal Creation
- Presentation Skills
- Negotiations and Closing
- Account Management
- Campaign Optimization
- Digital Skills
- Digital Platforms

**Marketing and Advertising Products**

- Print
  - Newspapers - Display and/or Classifieds
  - Inserts - Toppers, Wraps and Spadeas
  - Total Market Coverage and Direct Mail
  - Magazines and Custom Publishing
- Events - Business and Consumer Expos
- Digital Advertising Products for Desktop, Mobile/Tablets and Applications
  - Digital Display and Video
  - Google Advertising Products - Certifications
    - Display
    - Search
    - Shopping
    - Video
    - Optimization
  - Advanced Targeting
    - Programmatic Real Time Bidding
    - Demographic
    - Geographic
    - Behavioral
    - Retargeting
    - Device
    - IP Address
    - Content and Category
  - Connected TV Advertising
  - Audio Advertising
  - Email Marketing
  - Social Media
  - Native Content
  - Chat

**Sales and Marketing Tools**

- Customer Relationship Management
- Order Fulfillment Software
- Attribution Models
- Sales Engineering
- Market Research Tools
- Competitive Media
- Client Categories - Industry Trends
- Order Booking Software
- Advertising Creative Design Software
- Campaign Management Software
- Campaign Optimization Software
- Project and Product Management Tools
- Web Interface/Web Design/Website 101
- Google AdWords and Analytics
- Digital Platforms for:
  - Account Creation and Set-Up
  - Account Strategy and Structure
  - Campaign Development
  - Campaign Optimization

**MANUFACTURING SKILLS**

- Equipment Training
- Process and Quality Assurance Improvements
- Testing/Debugging Techniques
- New Equipment Training
- Technical Support
- Maintenance and Repair
- Handling Hazardous Materials
- Shipping/Receiving Techniques
- Material Handling & Storage Procedures

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



# Pacific Media Workers Guild

The NewsGuild - Communications Workers of America Local 39521

433 Natoma Street, San Francisco, California 94103, 415.421.6833, Fax 415.421.3751

October 8, 2018

Mr. Mark Reeves  
Analyst, N. Hollywood Regional Office  
Employment Training Panel  
4640 Lankershim Boulevard, Suite 311  
North Hollywood, CA 91602

RE: California Newspapers Partnership ETP Application

Dear Mr. Reeves:

The Pacific Media Workers Guild supports the training program and partnership proposed between the California Newspapers Partnership ("CNP") and the State of California's ETP program.

Members of our union have advocated for and helped advance similar training in the past. Training under CNP's current proposal would be available to members of our bargaining units at several publications in the San Francisco Bay Area, including Oakland, Walnut Creek, San Jose and Monterey.

Sincerely,

Kat Anderson  
Interim Executive Officer

Cc Karen Austin, MediaNews/CNP

**West Hills Hospital dba West Hills  
Hospital & Medical Center**

**WITHDRAWN**





**Training Proposal for:  
Wonderful Pistachios & Almonds LLC**

**Agreement Number: ET19-0340**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** L. Vuong

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate HUA	Industry Sector(s):	Manufacturing (E)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno, Kern, Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 1,450	U.S.: 8,500	Worldwide: 9,000
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$432,870

<b>Total ETP Funding</b>
\$406,120

**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 HUA	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills	680	8-200	0	\$572	*\$12.53
				Weighted Avg: 22			
2	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills	30	8-200	0	\$572	\$17.54
				Weighted Avg: 22			

\*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 Number 1 (HUA): \$12.53 per hour for Fresno and Kern counties

Job Number 2: \$17.54 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 \$1.53 per hour for Job Number 1 and up to \$2.50 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
<b>Job Number 1</b>		
Administrative Staff		35
Customer Service Staff		20
Production Staff		500
Support Staff		60
Engineer		30
Manager/Supervisor		35
<b>Job Number 2</b>		
Administrative Staff		10
Customer Service Staff		10
Manager/Supervisor		5
Support Staff		5

## **INTRODUCTION**

Founded in 1989, Wonderful Pistachios & Almonds LLC (Wonderful) ([www.wonderful.com](http://www.wonderful.com)), requests funding for its employees and two closely affiliated entities, Wonderful Growers Cooperative and Cal Pure Produce Inc. All three entities are wholly-owned subsidiaries of the Wonderful Company LLC in Los Angeles. Headquartered in Lost Hills, the Company has six facilities in California: five growing and processing sites in Lost Hills, Firebaugh, and Bakersfield; and an office in Los Angeles. International sites include Belgium, China, Korea, India, Mexico, and Brazil. Customers include retail and wholesale food distributors worldwide such as Costco, Wal-Mart, Tesco, Blue Diamond, Planter's, Kraft, Trader Joe's, and Whole Foods.

Wonderful farms 125,000 acres of almonds and pistachios (in tandem with grower partners) that harvest approximately 600 million pounds annually. The Company's grows, processes, and markets its product to ensure quality. Its products are sold under the Wonderful label, as well as private-label, to food manufacturers and foodservice customers across the US and worldwide. Wonderful also offers in-shell and shelled pistachios, along with various almond products, including whole, sliced, slivered, or diced, all of which are supplied in raw, roasted, blanched, and flavored forms.

Training will take place at Lost Hills, Firebaugh, Bakersfield and Los Angeles locations.

### **Veterans Program**

Wonderful is working to recruit Veterans into its workforce through its website, job fairs and other forms of outreach. However, this project does not include training for Veterans.

## **PROJECT DETAILS**

This will be Wonderful's the third ETP Contract, and the third in the last five years. Previous training focused on improving productivity and training on Wonderful Improvement Network (WIN), a Lean Manufacturing software program. For this proposal, process improvement and WIN training will continue, but at a much higher level. Training will focus on more complex operations, attracting new customers and implementing a new continuous quality improvement training program called Plan, Do, Check, and Act (PDCA). PDCA is a model of continuous improvement process and technique for organization and consistency to improve operating efficiency, reduce waste, identify root cause and increase profits. In addition, Wonderful must keep up with technological advances, industry requirements and customers' expectations to remain competitive in the marketplace. This involves extensive training to put processes and practices into place quickly, while maintaining superior quality standards.

In the past year, the Company experienced a 15% growth in business and anticipates similar growth in the coming year. Training will enable the Company to retain skilled workers, remain competitive, attract new customers and promote continued growth.

ETP funding will allow Wonderful to lead in the manufacturing marketplace, attract new customers and provide the most cutting edge products. Wonderful has developed a company-wide training program to modernize business practices and procedures. Workers will gain skills to optimize job performance, promote company growth, better serve customers and improve efficiencies. Training is essential to the Company's business operations and success. Training from the prior ETP project will not be duplicated in this proposal.

## Training Plan

Classroom/Laboratory and Videoconference training will be provided as following:

**Business Skills:** Training will be offered to all occupations and focus on improved water conditions, business processes, quality products and leadership skills.

**Computer Skills:** Training will be offered to all occupations to become more proficient in various software applications, systems and in the skills necessary to support the business operations.

**Continuous Improvement:** Training will be offered to all occupations in process improvement and efficiency. WIN training will help them establish a culture of continuous improvement; and focus on improving manufacturing efficiency to reduce operation cost.

**Hazardous Materials:** Training will be offered to Engineers, Managers/Supervisors, Production and Support Staff. Trainees will learn proper techniques for handling and cleaning hazardous materials and chemical substances during production processes.

**Manufacturing Skills:** Training will be offered to Engineers, Managers/Supervisors, Production and Support Staff. Trainees will be trained in Wonderful manufacturing practices and staff will be cross-trained to do several jobs. Training will upgrade worker's production efficiency, increase productivity and meets customers' expectations.

## High Unemployment Area

All trainees in Job Number 1 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's locations in Firebaugh (Fresno County), Bakersfield and Lost Hills (Kern County) are in an HUA. The Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Wonderful is requesting the 25% wage modification, from \$16.70 to \$12.53, for trainees in Job Number 1 only.

## Commitment to Training

Wonderful has a current annual training budget of approximately \$1,208,000 for itself and its two affiliates. The Company provides new-hired orientation, sexual harassment prevention, first-aid training, job skills training, OSHA mandated training and on-the-job training program for manufacturing skills. In addition, Microsoft (MS) basic level and Management Skills are provided as needed. All training is mandatory and all workers receive some training.

ETP funding will allow Wonderful to provide well-designed, goal-oriented company-wide training. The Company will be able to implement changes throughout the organization to meet its goals. 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

Training will begin upon Panel approval. Wonderful has designated a team of eight staff that includes a Director of Training, a team of Managers/Supervisors and a Training Coordinator to oversee ETP training and administrative responsibilities. A team of Managers/Supervisors and trainers will travel to each location to provide training, secure rosters and ensure ETP compliance. The Company has also retained a third party to assist with administrative duties.

## **Green/Clean Operations**

Since 2007, Wonderful has operated with the help of solar power. Each year, the Lost Hills facility uses power from the city's 1.1 mega-watt, \$7.5 million solar plant that supplies about 15% of the city's energy. The alternative power generated by the plant eases the burden on the local power supply and on the California power grid. Wonderful has also invested \$2.5 million to install its own power substation at the Los Hills facility.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET17-0117	Lost Hills, Firebaugh, Bakersfield, and Los Angeles	07/01/16 – 06/30/18	\$749,070	\$407,882 (55%)
ET15-0323 (Drought)	Lost Hills, Firebaugh, Bakersfield, and Los Angeles	11/24/14 – 11/23/16	\$743,400	\$743,400 (100%)

\*ET17-0117: The Company was unable to utilize 100% of ETP funding due to production demands during scheduled training. Since the last contract, production has leveled out allowing workers to attend more training. To ensure success in this proposal, the Company has developed a conservative training plan and a more practical schedule that will accommodate trainees and meet the Company's training goals. The Company has also designated a team of eight staff (Director of Training, Managers/Supervisors and Training Coordinator) to closely oversee ETP training and administrative responsibilities, with emphasis on management of training schedules. Training plans will be closely coordinated with management to prevent conflict with production demands. This proposal has been right-sized to prior performance.

## **DEVELOPMENT SERVICES**

National Training Company, Inc. (NTC) in Irvine assisted with development for a flat fee of \$10,800.

## **ADMINISTRATIVE SERVICES**

NTC 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**

- Accounting Skills
- Business Processes
- Communication Skills
- Product Knowledge
- Sales Skills

**COMPUTER SKILLS**

- Computerized Inventory
- Internal Customer Applications
- Microsoft Office (Intermediate/Advanced)
- Small Packaging Software

**CONTINUOUS IMPROVEMENT**

- Critical Think Skills
- Kaizen Events
- Leadership Skills
- Lean Manufacturing
- Plan, Do, Check, and Act
- Problem Solving
- Standard Operating Procedures
- Team Building
- Wonderful Improvement Network

**HAZARDOUS MATERIALS**

- Hazardous Material Handling
- HazMat Operating Procedures
- Material Safety Data Sheets

**MANUFACTURING SKILLS**

- Compliance Tracking
- Control Systems
- Equipment Cross-Training
- Equipment Drive Systems
- Equipment Maintenance and Repair Skills
- Equipment Safety Procedures
- Equipment Set-Up and Testing
- Food Processing Equipment
- Food Safety
- Forklift Certification
- Good Manufacturing Practices
- Inspection Equipment
- Inventory & Raw materials Training
- Manufacturing Operating Procedures
- Manufacturing Processes

- Product Packaging
- Product Specifications
- Safety Quality Food Certification
- Sanitation

Safety Training cannot exceed 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.



**Training Proposal for:**  
**California Creative Solutions, Inc. dba CCS Global Tech**  
**Agreement Number: ET19-0333**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** San Diego

**Analyst:** K. Hernandez

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Services (G) Information Technology  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 150	U.S.:279	Worldwide: 350
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	4%		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$310,000

<b>Total ETP Funding</b>
\$280,800



**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.,	120	8-200	0	\$2,340	\$17.03
				Weighted Avg: 90			

**Minimum Wage by County:** Job Number 1: \$17.03/hr 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 \$2.50/hr may be used to meet the Post-Retention Wage for Job Number 1.

**Wage Range by Occupation**

Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		5
Managers/Supervisors		5
Software Engineering Staff		105
Technical Staff		5

**INTRODUCTION**

Founded in 1997 and headquartered in San Diego, California Creative Solutions, Inc. dba CCS Global Tech (CCS) ([www.ccsglobaltech.com](http://www.ccsglobaltech.com)) is a Microsoft certified consulting firm with locations in New York, Philadelphia, Australia, India, Singapore, Malaysia and San Francisco. CCS is primarily engaged in providing computer programming services, computer software design, mobile application development, and cloud-based IT services. The Company specializes in Microsoft Business Intelligence (Microsoft BI) and customized software/application development to retrieve, analyze, transform and report computer data, making data more accessible and relevant to the end-user. Examples of Microsoft BI are word processors, spreadsheets, accounting applications, web browsers, and creative platforms that have evolved into cloud based systems that end-users can now access from their desktop, laptop or mobile devices.

Customers are from educational institutions, finance/banking, healthcare, manufacturing, and government agencies including Chapman University, Capital Insurance Group, Thomson Reuters, TEKsystems, and San Mateo County.

**PROJECT DETAILS**

CCS's customer base and market growth has increased significantly in the last year due to the high demand of design, development, and implementation of Microsoft BI products. Consequently, staff must be proficient in the newest software/application platforms to design, develop, and implement customized application software and bridge the gap between different software/application platforms. Training will increase employee knowledge of sophisticated software and ensure IT investments can be integrated with both new and old computer systems.

Additionally, Microsoft recently launched several new BI products, requiring staff to quickly adapt and learn nuances of each new product to meet the needs of customers. Employees will receive significant technical training focused on designing, developing, and implementing the new Microsoft BI products.

## **Training Plan**

The purpose of this training project is to provide Microsoft BI training to Software Engineering Staff. CCS recently acquired two multi-million dollar contracts that require the Company to train Software Engineering Staff. Each Software Engineer requires 200 hours of technical training to become Microsoft Certified on BI requirements for Microsoft Business Intelligence Services, Microsoft Business Intelligence Suite, Computer Programming/Software Development, Database Development, System Architecture/Design, and Tableau.

A senior level Software Engineer will provide training. The course will be conducted in a classroom environment along with a software-simulated, hands-on lab. Training will assist the Company to better meet its customers' needs.

**Business Skills:** Training will be provided to all occupations focused on Accounting, Business Processes, Communication, Customer Service, Product Knowledge, and Time Management. All employees will need to learn new business processes that are being implemented as a result of changes in the business.

**Computer Skills:** Training will be provided to Software Engineering Staff focused on Business Intelligence Services (Microsoft/Azure), Computer Programming/Software Development, Server Programming, and Software/Hardware services to meet the business demands of clients.

**Continuous Improvement:** Training will be provided to all occupations focused on Business Development, Change Management, Conflict Management, Lean Six Sigma, Process Improvement, and Team Building. Improvements in these areas will help to reduce costs and improve software production.

## **Commitment to 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. In 2017, CCS invested \$310,000 in training. ETP Funding will allow CCS to deliver new training topics, provide more training more, and offer training to a larger group of employees.

### ➤ Training Infrastructure

Training will be delivered by CCS's in-house trainers and vendors retained as needed for advanced technical software training. The project will be managed by the Chief Financial Officer with assistance from the Human Resources department. An Administrative Coordinator will manage training efforts and ensure proper record keeping procedures are in place. CCS also retained National Training Company, Inc. to help with project administration.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

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

## **ADMINISTRATIVE SERVICES**

CCS retained National Training Company, Inc. in Irvine to perform administrative services in connection with this proposal 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**

- Accounting
- Business Processes
- Communication
- Customer Service
- Leadership
- Product Knowledge
- Sales Skills
- Time Management

**COMPUTER SKILLS**

- Business Intelligence Services (Microsoft/Azure)
- Business Intelligence Suite (Microsoft/Azure)
- Computer Programming/Software Development
- Database Development
- Enterprise Resource Planning System
- Microsoft Office (Intermediate/Advanced)
- Project Management Software
- Server Programming and Administration
- Software/Hardware
- System Architecture/Design
- Tableau

**CONTINUOUS IMPROVEMENT**

- Business Development
- Change Management
- Conflict Management
- ISO 9001
- Leadership/Coaching
- Lean Six Sigma
- Meeting Management
- Performance Improvement/Management
- Process Improvement
- Team Building

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:**

**Premier Medical Transport, Inc.**

**Agreement Number: ET19-0356**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** San Diego

**Analyst:** H. Bernard

**PROJECT PROFILE**

Contract Attributes:	Job Creation Initiative Medical Skills Training Priority Rate SET HUA	Industry Sector(s):	Services Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange, Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 110	U.S.: 110	Worldwide: 110
<u>Turnover Rate:</u>	4%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$616,671

<b>Total ETP Funding</b>
\$429,000

**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 Medical Skills Training HUA	Computer Skills, Continuous Impr, MS Didactic, MS Preceptor	165	8 - 200	0	\$2,600	*\$14.58
				Weighted Avg: 100			

\*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:** Orange County: \$14.58/hr; Los Angeles County: \$14.62/hr  
**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 \$1.22 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Paramedic		14
Registered Nurse		13
Respiratory Therapist		7
**Emergency Medical Technician (EMT)		123
Dispatcher		4
Biller		4

\*\*Of the EMT's included in this project, approximately 98 trainees are expected earn between \$13.40-\$14.58 per hour.

**INTRODUCTION**

Founded in 2008 and headquartered in Brea, Premier Medical Transport, Inc. (Premier Medical) ([www.premieramb.com](http://www.premieramb.com)) is a non-emergency inter-facility ambulance service provider in Orange and Los Angeles Counties. This includes transports from hospital to hospital, clinic to clinic, hospital to rehabilitation center or hospital to long term care facility. The Company contracts with major health plans, hospitals, and medical groups. The Company has three locations: Brea (Orange County) and Irwindale and Van Nuys (Los Angeles County).

The Company offers different types of medical transportation services:

- Basic Life Support (BLS) for patients who do not require extra supports or cardiac monitoring during transport.
- Critical Care Transportation and Advanced Life Support for patients who need a higher level of care than those provided by a BLS transport, including a cardiac monitor for those with airway compromises or potential complications during transport. (This specialized,

critical service requires highly skilled staff such as Respiratory Therapists and/or Registered Nurses during the transport to ensure that critical needs are met.

- Neonatal Transport and Pediatric Intensive Care Unit services for patients who require trips to an emergency room due to rapidly emerging postpartum problems and/or children and babies who require specialized equipment.
- Bariatric Transportation for larger patients which includes a specialized gurney for safe and dignified accommodations.

## **Veterans**

Premier Medical hires Veterans, though the Company does not actively recruit for veterans.

## **PROJECT DETAILS**

The safety and quality of patient care during transport is reliant upon staff skills. With increasing patient volume and the increasing complexities of patients' needs, Premier must increase staff training and development to meet customer demands. The Company recently purchased 14 new ambulances and plans to purchase advanced life support equipment, digital radio equipment, IV pumps, cardiac monitors, ventilators and additional support vehicles by early 2019. Training will allow staff to provide proper care to patients during transport.

Additionally, the healthcare industry has seen major increases in the use of technology to improve patient care. Premier Medical utilizes Orange County's Emergency Medical Service (EMS), an electronic documentation data platform, for its medical records. As more regulations are updated, the Company will be required to update the EMS and train staff accordingly. Training is critical to improve processes and ensure compliance.

## **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

Currently, the Company is experiencing rapid growth and anticipates 200% increase in staffing in 2019. This year, the Company has already hired 72 trainees. The Company expects hiring to significantly increase due to:

- The need for patient transfers between facilities has increased as a result of regionalization and specialization (e.g. increases in specialized cardiac centers and stroke centers that serve specific kinds of patients).
- The Company recently picked up 3 new contracts with private agencies and local municipalities, including boutique surgery centers and the County of Los Angeles and is negotiating additional contracts expected to close in early 2019 ;
- Currently, the Company only provides Critical Care transportation in Orange County. This service will be expanding to Los Angeles County to account for an increase in patients requiring more complex needs. This will require the Company to hire more Registered Nurses and Respiratory Therapists. This will also require additional skills for EMT's and Paramedics to meet the needs of the most sensitive patients.
- The Company will be opening an additional facility in Van Nuys in November 2018, and may open prospective facilities in Glendale, South Bay and San Diego County in the near future.

Due to this expansion, the Company will hire 165 employees. The date-of-hire for 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

Medical Skills Training (Didactic and Preceptor) will be provided to EMT's, Registered Nurses, Respiratory Therapists and Paramedics, reimbursed at \$26 per hour. The standard class/lab Job Creation reimbursement rate of \$26 per hour will apply to Continuous Improvement and Computer Skills training for Dispatchers and Billers. Preceptor training must not exceed ETP's trainer-to-trainee ratio of 1:10; however, Premier Medical expects Preceptor training to occur at a 1:1 ratio. Much of the training will occur at the headquarters location in Brea; however, some training will occur at the Van Nuys location and in the field, in ambulances.

Following are some curriculum topics. Training will be delivered by in-house subject-matter experts and vendors. While, Premier Medical makes a concerted effort to hire staff that are highly skilled, onboarding newly hired staff, regardless of skill level, requires an extensive amount of training. As such, these staff are expected to receive between 80-186 hours of training depending upon their specialty.

**Computer Skills:** Microsoft Office (Intermediate), Electronic Medical Records, Patient Care Record, ICD-10

**Continuous Improvement:** Billing, Call Center & Dispatch Protocols, Crisis Prevention & Intervention, Customer Service, Documentation, Critical Thinking, Patient Privacy, Leadership Skills

**Medical Skills - Didactic:** Basic & Advanced Life Support, Airborne Pathogens, Care of Cardiac Patients, Critical Care, Equipment Operations, Medical Transport of High Risk Patients, Pain Management, Pediatric Patient Care, Pharmacology & Pharmacokinetics, Respiratory Arrest, Standards of Care, Ventilator Operation

**Medical Skills – Preceptor:** Ambulatory Patient Care, Advanced Cardiac Life Support, Equipment Operation, Trauma Patient Care, Geriatric Patient Care, Pediatric Patient Care, Pre-Hospital Trauma Life Support, Respiratory Arrest, Patient Assessment & Pre-Hospital Care, Patient Transport Techniques, Code Blue Response and Procedures

## Commitment to Training

Premier Medical spends approximately \$200,000 in training in topics such as sexual harassment, patient transfer, gurney operations, professionalism, and situational awareness. 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 project will be overseen by the Company's President. The Chief Financial Officer and Human Resources Department will administer the project and appoint staff at each location to collect training rosters. Premier also retained National Training Systems, Inc. to assist with administration.



**High Unemployment Area**

Premier Medical's Irwindale facility is located in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. However, the Company is not requesting a wage modification.

**Retention Modification**

Premier Medical has requested the alternate retention period of at least 500 hours within 120 days. Due to the nature of the medical transportation industry, it is not customary for some staff to work a standard 35 hour (or more) work week. A full day of work ranges between 8 and 12 hours depending on the position. Allowing Premier Medical the flexibility to meet retention requirements through the alternate method will allow the Company to meet staff scheduling demands.

**Special Employment Training**

Under SET, the employer is not required to demonstrate out-of-state competition. Trainees must be earning at least the statewide average hourly wage at the end of the retention period. However, because all trainees included in this project will be Retrainee-Job Creation, they will be subject to the New Hire wages for 2018 by county.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

Premier Medical retained National Training Systems, Inc. in Ladera Ranch to assist with development of this proposal for a flat fee of \$16,500.

**ADMINISTRATIVE SERVICES**

Premier Medical also retained National Training Systems, Inc. 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 – 200

Trainees may receive any of the following:

**COMPUTER SKILLS**

- Microsoft Office/Excel (Intermediate and Advanced)
- Electronic Medical Records Application
- Patient Care Record
- Premier App
- ICD-10

**CONTINUOUS IMPROVEMENT**

- Ambulance Operation
- Billing
- Call Center & Dispatch Protocols
- Communication Skills
- Conflict Resolution
- Crisis Prevention & Intervention (CPI)
- Critical Thinking
- Customer Service
- Documentation
- EMS Communication & Protocols
- Emergency Vehicle Operations Course
- Federal Emergency Management Agency (FEMA) Guidelines
- HazMat for Patient Care Providers
- HIPPA/Patient Privacy
- Leadership Skills
- Performance & Quality Improvement
- Preceptor Skills (Train-the-Trainer)
- Standard Operating Procedures

**MEDICAL SKILLS TRAINING – DIDACTIC**

- Basic Life Support (BLS)
- Advanced Life Support
- Airborne Pathogens
- Bloodborne Pathogens
- Body Mechanics
- Cardiac Assessment
- Care of Cardiac Patients
- Care of the Bariatric Patient
- Care of Geriatric Patients
- Care of the Renal Patient
- Care of and Treatment of Shock Patients
- Care of the Stroke Patient
- Chronic Obstructive Pulmonary Disease (COPD)
- Code Blue Response and Procedures
- Critical Care
- Decontamination Procedures

- Dysrhythmia Recognition & Interpretation
- EKG & Cardiac Monitors
- Emergency Medical Technician (EMT) Training (including EMT-1)
- Equipment Operation
- Hazardous Materials/Protection
- Medical Transport of High-Risk Patients
- Medication Administration & Reconciliation
- Neonatal Intensive Care Unit (NICU) Transport
- Neurological Assessment & Pre-Hospital Care
- Orthopedic Assessment & Pre-Hospital Care
- Orthopedic Stabilization & Traction
- Oxygen Administration
- Pain Management
- Patient Assessment & Pre-Hospital Care
- Pediatric Patient Care
- Pharmacology & Pharmacokinetics
- Pre-Hospital Trauma Life Support
- Psychiatric Patient Care
- Respiratory Arrest
- Respiratory Assessment & Pre-Hospital Care
- Restraints
- Standards of Care
- Ventilator Operation

#### **MEDICAL SKILLS TRAINING –PRECEPTOR**

- Ambulatory Patient Care
- Advanced Cardiac Life Support
- Code Blue Response and Procedures
- Cardiac Patient Care
- Equipment Operation
- Trauma Patient Care
- Geriatric Patient Care
- Pediatric Patient Care
- Pre-Hospital Trauma Life Support
- Respiratory Arrest
- Patient Assessment & Pre-Hospital Care
- Patient Transport Techniques

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



**Training Proposal for:**

**Temecula Valley Hospital, Inc. dba Temecula Valley Hospital**

**Agreement Number: ET19-0332**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**PROJECT PROFILE**

Contract Attributes:	Retrainee SET Priority Rate Medical Skills Training	Industry Sector(s):	Services (G) Healthcare (62)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Riverside	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 7,010	U.S.: 59,000	Worldwide: 83,000
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$1,030,400

<b>Total ETP Funding</b>
\$663,520

**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	Cont. Improv., M.S. - Didactic, M.S. - Clinical with Preceptor	190	8 - 200	0	\$2,860	\$30.36
				Weighted Avg: 110			
2	Retrainee SET Priority Rate Medical Skills Training Job Creation Initiative	Cont. Improv., M.S. - Didactic, M.S. - Clinical with Preceptor	42	8 - 260	0	\$2,860	\$13.66
				Weighted Avg: 110			

**Minimum Wage by County:**

**Job Number 1:** Statewide Average Wage (SET): \$30.36 per hour; and

**Job Number 2:** \$13.66 per hour Job Creation Wage 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

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
Registered Nurse		200
New Graduate Registered Nurse		32

**INTRODUCTION**

Founded in 2013, Temecula Valley Hospital, Inc. dba Temecula Valley Hospital (TVH) ([www.temeculavalleyhospital.com](http://www.temeculavalleyhospital.com)) is the first hospital built in the city of Temecula. Residing on 37 acres in southwest Riverside County in Temecula, TVH's 5-story facility has 140 private licensed beds, 20 intensive care beds, 4 high-tech surgical suites, a cardiovascular surgical suite, and a catheterization laboratory.

The Hospital recently completed a 28,000 square-foot expansion, which now houses two additional catheterization laboratories; a biplane room to perform minimally invasive procedures for advanced stroke care; a hybrid Operating Room; seven post anesthesia care beds; seven ambulatory care beds; a new Computed Tomography (CT) scanner; a surgical waiting lobby; and a large community room. TVH also boasts an advanced electronic clinical information system and digital imaging capabilities.

TVH offers a full range of medical services including emergency; medical and surgical; intensive care; cardiovascular; stroke care; orthopedics; and pulmonary care. The Hospital is a designated STEMI (ST Elevated Myocardial Infarction and Chest Pain) Receiving Center and has Advanced Primary Stroke Center Accreditation and certified for Total Joint Orthopedic Surgery by The Joint Commission.

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.

This will be the third ETP project for TVH, the third in the last five years. Training is targeted for TVH only. TVH is eligible for ETP funding under Special Employment Training (SET) for frontline workers and qualifies for ETP's Priority Industry reimbursement as a hospital.

## **PROJECT DETAILS**

In its previous ETP projects, TVH was able to provide various computer, continuous improvement, and extensive medical skills training to existing and newly-hired New Graduate Registered Nurses and experienced Registered Nurses (RNs). Training enabled the Hospital to provide nurses with advanced skills to support patient care services when it first opened its doors in October 2013, allowing the Hospital to successfully support specialty units through its continued expansion.

In the next two years, TVH plans to further expand its facility to include an Emergency Department (ED) expansion from 21 to 32 beds. As specialty programs grow, the Hospital's utilization of the additional cardiac catheterization laboratories, surgical suites, and recovery room areas will increase. The Hospital is also committed to expanding its services in CT perfusion, electrophysiology for cardiac arrhythmias, and treatment for cerebral aneurysms and brain tumors. Planning has also begun for the construction of TVH's second patient tower.

While TVH continues to experience immense growth in its facility, programs, and services, the Hospital has also seen an increased influx of patients. TVH's business growth and increase in patient population require the Hospital to continuously recruit RNs to maintain quality care for its patients. The continued lack of sufficient experienced nurses in the community calls for TVH to not only retrain incumbent staff, but also hire New Graduate nurses and provide them with advanced medical skills training to successfully perform duties in specialty units such as Emergency Department and Intensive Care Unit; and new programs and services such as perioperative, cardiology, surgery (including cardiac and orthopedic), stroke, and neuro intervention.

Since its opening, the Hospital has consistently hired between 16 and 24 New Graduate RNs annually. Respectively, TVH is committed to hiring and training up to 42 RNs, including 32 New Graduate RNs, in the next two years to support ongoing and anticipated future business growth and increased patient demands.

In this proposal, ETP funding will supplement the Hospital's commitment to providing a comprehensive New Graduate RN Training Program to its newly-hired nurses and an extensive specialty training to its incumbent nurses. Training will provide the skills necessary to support growth and increase the ability to recruit nurses, support retention, and provide career advancement opportunities.

## **Training Plan**

The proposed training will expand on training delivered in the previous project. In this proposal, some nurse training will be repeated; however, Training will not be delivered to the same incumbent workers. In addition, the proposed project will include newly-hired experienced and New Graduate nurses who have not received ETP training in the past. The Hospital plans to provide the following skills training:

**Continuous Improvement** – Training topics include Lean Six Sigma, 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, Service Excellence, and Utilization Review.

### **Medical Skills Training (Didactic and Clinical with Preceptor)**

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 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 them for work in specialty areas of the hospital. The Hospital’s MS training program will provide comprehensive training to include all aspects of skills and knowledge required to enable staff to be competent to perform the functions of the job.

The Hospital’s MS training curriculum has been 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.

### **Retrainee - Job Creation**

With the Hospital’s expanding and upgrading facilities as well as expanding existing and adding new programs and services, TVH has committed to hiring 42 new employees (10 experienced RNs and 32 New Graduate RNs). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. The Hospital also represents that 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 in the community, 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 Hospital’s New Graduate Training 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.

In its prior contract, the Hospital requested to increase the maximum training hours from 200 to 260 hours for Job Creation trainees to supplement the Hospital's 400-hour New Graduate Training Program. In this proposal, TVH is once again requesting this modification to allow funding for up to 260 training hours for approximately 32 New Graduate RNs (in Job Number 2) who may require more extensive theory training and practical, clinical knowledge.

### **Commitment to 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.

The Hospital's current annual company-wide training budget is approximately \$1,030,400 which covers training for all job categories on an ongoing basis. TVH supports a patient and family centered care approach. Staff receives training specific to hospital culture, mission, vision, values, and service excellence. Additional training also includes policies and procedures, equipment, supplies, technology, computer, and electronic medical record.

#### ➤ Training Infrastructure

The Hospital's Education Department successfully administered its previous ETP projects. TVH's Chief Nursing Officer will continue to oversee the overall management and implementation of the proposed ETP contract. The Education Manager and Administrative Assistant will assist with the administration of the ETP project including scheduling and coordinating training, enrolling trainees, tracking training hours, and submitting invoices.

Training will be delivered by in-house educators and medical staff/physicians who are subject-matter experts. Training is ongoing; however, implementation of ETP training and documentation of ETP-eligible training will start upon contract approval.

### **Special Employment Training (SET)**

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

#### **SET Priority Industry Wage Modification**

Although TVH is eligible for the Panel's Priority Industry Wage Modification from \$30.36 to \$22.77, it is not requesting the wage modification given the hourly compensation is over the SET Wage.

### **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 \$ %
ET17-0168	Temecula	9/6/16 – 9/5/18	\$500,060	\$500,060 (100%)
ET14-0323	Temecula	5/5/14 – 5/4/16	\$395,200	\$296,275 (75%)

**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 for newly-hired experienced Registered Nurse

Job Number 2: 8 – 260 for New Graduate Registered Nurse Only

Trainees may receive any of the following:

### **MEDICAL SKILLS – 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
- Disaster Training
- 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 – CLINICAL WITH 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
- **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
- **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
  
- **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
  
- **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

### **CONTINUOUS IMPROVEMENT**

- Lean Six Sigma
- 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
- Service Excellence
- Utilization Review

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

**Exception:** For New Graduate Registered Nurse in Job Number 2, training hours are capped at 260 total training hours, per trainee.



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Grand Rounds, Inc.**

**Agreement Number: ET19-0352**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** San Francisco Bay Area

**Analyst:** S. Wang

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Services (G) Information / Multi Media (51)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Francisco County	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 200	U.S.:450	Worldwide: 450
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	11%		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$310,000

<b>Total ETP Funding</b>
\$281,060

**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. Improv.	180	8-200	0-100	\$1,222	\$18.22
				Weighted Avg: 47			
2	Retrainee Job Creation Priority Rate	Business Skills, Computer Skills, Cont. Improv.	50	8-200	0-100	\$1,222	\$15.18
				Weighted Avg: 47			

**Minimum Wage by County:** Job 1 - \$18.22, Job 2 - \$15.18 for San Francisco 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 the Post-Retention Wage.

**Wage Range by Occupation**

Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Support Staff		30
Case Coordinators		30
Customer Service Staff		50
IT Staff		50
Managers/Supervisors		20
<b>Job Number 2: Job Creation</b>		
Administrative Support Staff		10
Case Coordinators		5
Customer Service Staff		20
IT Staff		10
Managers/Supervisor		5

**INTRODUCTION**

Founded in 2011 and headquartered in San Francisco, Grand Rounds, Inc. (Grand Rounds) (<https://www.grandrounds.com/>) is a healthcare navigation service company that provides its members with physician directory, complex care, clinical navigation, and medical treatment advice through the Company's cloud-based platform. The Company serves over four million members across the United States and around the world. Customers include Fortune 500 companies such as Walmart. Grand Rounds has additional offices in Nevada and Maine. This will be Grand Round's first ETP Contract.

## Veterans Program

Currently, Grand Rounds has five Veteran staff and plans to hire additional Veterans during the contract term. Grand Rounds is looking into creating a Veteran's outreach program in the near future to attract more Veterans.

## PROJECT DETAILS

Grand Rounds needs to train staff in Business and Computer Skills to effectively support growing customer demand. The Company's growth is estimated at 30% annually. This growth has negatively affected customer service as volume has increased. Training will provide staff with knowledge and tools to better assist customers.

Training areas include:

- Sales Enablement Training to improve sales techniques for assisting members;
- Care Team Customer Service Program for Case Coordinators for effective communication, handling of member files, and understanding of operating procedures.
- DDI (Development Dimensions International) Leadership for improved leadership development for frontline Managers and Supervisors.
- Amazon Web Services (AWS), Grand Round's data security software provided through a cloud platform via the internet, for improved data security and access. IT Staff will receive training on AWS's functions to create a more reliable and robust cloud service for staff who need to access medical histories; and,
- Google Cloud Platform, Grand Round's in-house computer database that tracks member information such as medical files and email traffic, for controlled cloud access and visibility of computer resources. IT Staff will gain knowledge of Google's Security Model, and use text commands to extract and input information into the Cloud system.

## Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

Grand Rounds is experiencing growth, and will increase business capacity by hiring new employees. Currently, the Company is providing service to 4.2 million members and sales forecast is projecting 5.4 million members in the next two years. As a result, Grand Rounds will hire 50 Job Creation trainees (Job Number 2). The date-of-hire for 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 be delivered via Class Lab, E-Learning, and CBT in the following:

**Business Skills:** This training will be offered all occupations in topics such as Account Management, Communication Skills, Sales Enablement Training, and Member Support. Training will improve customer service skills and operating efficiency while reducing operating costs.



**Computer Skills:** Training will be offered to all occupations. Training will increase computer software knowledge to allow staff to access member records and navigate systems.

**Continuous Improvement:** Training will be offered to all occupations in Critical Thinking Skills, Change Management, Standard Operating Procedures, and Teambuilding. Training will allow employees to work together for continuous business growth.

### **Commitment to Training**

Grand Rounds has an annual training budget of approximately \$350,000. The training budget includes new-hire orientation, OSHA-mandated training, sexual harassment prevention, first aid, basic Microsoft Office, on-the-job training for Customer Service Staff, and Management Development training on an as needed basis.

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. At the completion of the ETP training, the Company will continue to provide its workforce the skillsets needed to develop and grow within the Company.

#### ➤ Training Infrastructure

Grand Rounds is ready to start training upon approval. The Director of Learning and Development will be in charge of administration. The Training Coordinator and five other staff members (Managers, Supervisors, Trainers) will assist with administration and scheduling classes. The Company also retained National Training Company to assist with administration. Training will be provided by in-house experts and vendors, to be determined.

### **Electronic Record Keeping**

Staff has reviewed and approved Grand Rounds' LMS.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

The Company retained National Training Company, Inc. in Irvine to assist with development of this proposal for a flat fee of \$10,800.

### **ADMINISTRATIVE SERVICES**

The Company 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**

To Be Determined

**Exhibit B: Menu Curriculum****Class/Lab and E-Learning Hours**

8 - 200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Account Management
- Accounting Skills
- Business Processes
- Customer Service
- Coaching for Success
- Communication Skills
- Decision Making
- Grand Rounds Beacon (Treatment Opinions)
- Grand Rounds Summit (Data Gathering)
- Healthcare Guidance
- Medical Terminology
- Member Support
- Patient Care
- Product Knowledge
- Sales Enablement Training
- Sales Skills

**COMPUTER SKILLS**

- Amazon Web Services
- Computer Programming
- Cyber Security
- Customer Relationship Management System
- Database Administration
- Google Applications
- Google Cloud Platform
- Hadoop Ecosystem
- Internal Customer Applications
- Internet Security Systems
- Microsoft Azure
- Network Security
- Project Management
- Python
- Server Support
- Software Engineering
- SQL

**CONTINUOUS IMPROVEMENT**

- Change Management
- Critical Thinking Skills
- Engineering Leadership
- Kaizen Events
- Leadership Skills
- Lean Manufacturing

- Quality Assurance
- Standard Operating Procedures
- Teambuilding
- Team Problem Solving

**CBT Hours**

0-100

**BUSINESS SKILLS**

- Advanced Coaching (2 hours)
- Building and Sustaining Trust (2 hours)
- Coaching for Peak Performance (2 hours)
- Communicating for Leadership Success (2 hours)
- Communicating with Impact (2 hours)
- Delegating with Purpose (2 hours)
- Driving Change (2 hours)
- Engaging and Retaining Trust (2 hours)
- High-Impact Feedback and Listening (2 hours)
- Interaction Essentials for Leaders (2 hours)
- Leading Virtually (2 hours)
- Making High Quality Decisions (2 hours)
- Resolving Workplace Conflict (2 hours)
- Setting Goals and Reviewing Results (2 hours)
- Your Leadership Journey (2 hours)

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



**Training Proposal for:**  
**On-Time Air Conditioning and Heating, Inc. dba Service Champions**

**Agreement Number: ET19-0326**

**Panel Meeting of:** December 7, 2018

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

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SET	Industry Sector(s):	Construction (C) Services (61,71,72,81,92)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, Contra Costa, Placer, Santa Clara	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 230	U.S.: 230	Worldwide: 230
<u>Turnover Rate:</u>	15%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>In-Kind Contribution:</b> (100% of Total ETP Funding Required)
\$500,000

<b>Total ETP Funding</b>
\$312,000

**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	Business Skills Commercial Skills Computer Skills Continuous Improvement	200	8-200	0	\$1,560	\$22.77
				Weighted Avg: 60			

**Minimum Wage by County:** SET Statewide: \$22.77

**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.

**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. The average bonus amount was \$6.18 per hour. Approximately 10% of the staff (Leads, Dispatch/Customer Service, Service Technicians/Installer) 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 commission rate for the sales achieved. The average monthly Commission amount was \$6.42 per hour.

OTA is not a Retail Trade business. As such the occupations paid by bonus/commission do not fall under the Panel’s lowest priority for funding.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Lead		17
Operations Staff/Support Staff		18
Dispatch/Customer Service		18
Service Technician/Installer		147

## **INTRODUCTION**

Founded in 2003, and headquartered in Pleasanton, On-Time Air Conditioning and Heating, Inc. dba Service Champions (OTA) ([www.servicechampions.net](http://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.

This is OTA's second ETP project, the second in the last five years. Training will be delivered to staff in five locations (Pleasanton, Concord, Rocklin, San Jose, and Livermore).

### **Veterans Program**

OTA works directly with Hicks professional group, a certified disabled Veterans Business Enterprise, to recruit and hire Veterans in addition to internal hiring done directly by OTA where Veterans are targeted for hiring.

## **PROJECT DETAILS**

Since 2004, OTA has grown from 20 to 230 employees. 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. This demand is also related to Title 20 and 24 California Code of Regulation requirements that include new efficiency standards be met by 2020. For instance, new Title 24 California Code of Regulations require a 28% overall energy savings (2016-2020) leading to the development and implementation of emerging technologies to improve and reduce home energy use.

ETP-funded training will enable the Company to provide skills-upgrade training for incumbent installers and technicians to stay current with new technologies and systems used in the residential HVAC construction industry.

The prior ETP agreement helped OTA upgrade skills to improve the installation of Smart Equipment such as smart thermostat and equipment integration which allows for remote control of systems by the homeowner. OTA also offered training on Avaya IP Office, a new phone system that integrated with the Company's software to streamline customer service calls.

Training in this proposal will focus on Service Titan training, a new ERP system with cloud capability to help streamline activities across multiple departments.

Training is needed to meet specific training goals aligned with the Company's strategic plan. These goals include; increased sales, broadening service offerings to include new products or services such as Ductless systems, hybrid heat/cooling systems, and developing new service territory in the Sacramento region.

### **Impact/Outcome**

With ETP support for the supplemental training proposed, OTA will;

- Meet industry wide talent shortfalls created by anticipated increases in retirement thru 2022 while meeting simultaneous growth in the demand for services.
- Improve efficiency and competitiveness with better use of the new Service Titan ERP system and upgrades in technical skills across departments.

- Upgrade skills in Commercial HVAC services and the use of new software and tablet computer tools.
- Support the growth in demand and expansion into new territories as the Company continues to grow.

### **Special Employment Training**

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

### **Training Plan**

Courses will be delivered through Class/Lab and E-Learning methods. While some topics are similar to those provided in the prior agreement, the training in this proposal is updated from prior curriculum.

**Business Skills:** Training will be offered to all occupations. Training will upgrade quote and finance skills. Topics such as Marketing and Communication skills will be offered. In addition, training on new products and services will help employees better assist residential customer service and dispatch functions.

**Commercial Skills:** Training will be offered to Service Technicians/Installers, and Frontline Lead. Trainees will receive courses such as principles in Electronics and System Troubleshooting to upgrade skills needed to serve residential customers with their cooling and heating needs. This training is designed to help OTA keep pace with new innovations such as tankless water heaters and indoor air quality products that are installed with ducts that reduce allergens and mold.

**Computer Skills:** Training will be offered to all occupations. Training will be provided based specifically on the systems that each individual trainee utilizes in their daily job function. Topics such as ServiceTitan ERP software training will be delivered to help the company meet efficiency goals.

**Continuous Improvement:** 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 to remain competitive.

### **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. The Company's training budget for all California sites is approximately \$570,000 for 2019. The Company provides new hire orientation, Cal OSHA required training, ladder safety, lifting safety, hydration on-the-job training and sexual harassment prevention training at its own expense.

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 Prevention & 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**

OTA's Training Director will be in charge of the ETP project, along with one Manager at each of its five participating facilities to help manage the project internally. OTA has three internal trainers identified to deliver the training. OTA has also hired an experienced third party administrator, Training Funding Partners, to assist with administration.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes Contractor's performance under an ETP Agreement that was completed within the last five years.

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET17-0197	Pleasanton	9/6/16-9/5/18	\$413,000	*\$54,236	(13%)

\*Based on ETP Systems, 21,378 hours have been tracked for potential earnings of 100% of approved amount. The Contractor projects final earnings of 100% based on training delivered.

**DEVELOPMENT SERVICES**

OTA retained Training Funding Partners (TFP) in Fountain Valley to assist with development of this proposal for a flat fee of \$22,500.

**ADMINISTRATIVE SERVICES**

TFP will also 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/ E-learning**

8-200 Trainees may receive any of the following:

#### **BUSINESS SKILLS**

- Business Processes & Procedures
- Client Service/ Communication Skills
- Coordinating and Scheduling Service/Dispatching
- Equipment and Industry Overview
- Finance/Accounting Skills
- Logistics/Warehouse Skills
- Maintenance/Membership Programs
- Marketing
- Sales/Quoting
- Train-the-Trainer

#### **COMMERCIAL SKILLS**

- Electricity/Voltage & Schematics
- Principles of Electronics
- Residential Cooling/Heating Equipment and Installation Skills
- Residential Cooling/Heating/Maintenance Skills
- Residential Ducting/Equipment and Installations
- Residential Indoor Air Quality
- Residential Smart Equipment Technology/Controls
- System Troubleshooting

#### **COMPUTER SKILLS**

- Call Center/Dispatch Application Skills
- Intermediate/Advanced Microsoft Office (Word, Excel, PowerPoint)
- Payment Card Certification
- Service Titan ERP System
- Intermediate/Advanced Tablet Computer Applications

#### **CONTINUOUS IMPROVEMENT**

- Change Management Skills
- Leadership Skills
- Problem Solving Skills
- Process Mapping/Process Improvement Skills
- Project Management Skills
- Root Cause Analysis and Remediation
- Time Management Skills

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:**

**Blue Diamond Growers**

**Agreement Number: ET19-0322**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	Job Creation Initiative Priority Rate Retrainee HUA	Industry Sector(s):	Manufacturing (E)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento, Stanislaus	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 1,517	U.S.: 1,532	Worldwide: 1,537
<u>Turnover Rate:</u>	11%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
\$775,000

<b>Total ETP Funding</b>
\$312,780

**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., Mgmt. Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills	250	8-200	0	\$468	\$16.80
				Weighted Avg: 18			
2	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills	210	8-200	0	\$468	\$12.53*
				Weighted Avg: 18			
3	Retrainee Job Creation Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills	58	8-200	0	\$780	\$14.00*
				Weighted Avg: 30			
4	Retrainee Job Creation Priority Rate HUA	Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills	67	8-200	0	\$780	\$11.00*
				Weighted Avg: 30			

\*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 Number 1: \$16.80 per hour for Sacramento County  
 Job Number 2 (HUA): \$12.53 per hour for Stanislaus County  
 Job Number 3 (Job Creation): \$14.00 per hour for Sacramento County  
 Job Number 4 (Job Creation/HUA): \$11.00 per hour for Stanislaus 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.

<b>Wage Range by Occupation</b>		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff		20
Information Technology		10
Inventory Specialists		14
Laborers		15
Lift Truck Drivers		25
Machine Operators		70
Maintenance Staff		13
Plant Engineer		1
Quality Inspectors		20
Sanitation Generalists		27
Sorters		15
Team Leads/Managers		20
<b>Job Number 2</b>		
Administrative Staff		8
Information Technology		2
Inventory Specialists		8
Laborers		17
Lift Truck Drivers		15
Machine Operators		40
Maintenance Staff		13
Operator Technicians		34
Plant Engineers		2
Quality Inspectors		14
Quality Technicians		9
Sanitation Generalists		9
Sorters		20
Team Leads/Managers		12
Technical Machine Operators		7
<b>Job Number 3</b>		
Administrative Staff		6
Inventory Specialists		4
Laborers		4
Lift Truck Drivers		9
Machine Operators		13

Maintenance Staff		3
Quality Inspectors		4
Sanitation Generalists		7
Sorters		3
Team Leads/Managers		5
<b>Job Number 4</b>		
Administrative Staff		4
Inventory Specialists		6
Laborers		3
Lift Truck Drivers		4
Machine Operators		4
Maintenance Staff		2
Operator Technicians		3
Plant Engineers		3
Quality Inspectors		2
Quality Technicians		4
Sanitation Generalists		4
Sorters		4
Team Leads/Managers		10
Technical Machine Operators		14

## **INTRODUCTION**

Founded in 1910 and headquartered in Sacramento, Blue Diamond Growers (Blue Diamond), ([www.bluediamond.com](http://www.bluediamond.com)) is the world's largest almond processing and marketing company. The Company is a cooperative owned by half of the state's almond growers who produce more than 80% of the world's almond supply. The Company produces snack almonds nut-based crackers, almond milk, and packaged almonds for cooking and baking. Blue Diamond's customers include Nestle, Kellogg, Mars, See's Candies and retail consumers. The Company has facilities located in Sacramento, Salida and Turlock. All facilities will receive training under this proposal.

This is Blue Diamond's third ETP Contract, and the third in the last five years. Previous training included software and equipment at all locations with a focus in training employees at the Salida facility on the new pasteurization system. This proposal focuses on the expansion of the Salida and Turlock locations, job creation, and the implementation of new equipment and added production lines. It will also focus on training the entire staff on software version updates for SAP 4 HANA and Workday.

### **Veterans Program**

Blue Diamond actively recruits for Veterans through its Junior Military Officer Recruiting Program in partnership with Alliance. The Company recruits Junior Military Officers as the transition to civil life. In addition, Blue Diamond plans to attend 10 Veteran Career Fairs annually. Veteran trainees will participate in this proposal under all Job Numbers.

## **PROJECT DETAILS**

In 2013, Blue Diamond opened a 200,000 square foot manufacturing facility in Turlock with plans to expand to 500,000 square feet over three phases. Over the next two years, the Company will expand its square footage by 52,000 sq/ft. This new expansion will include new roasting, blanching, and beverage based equipment, increasing almond storage capacity. Blue Diamond is also expanding its Salida location with a 500,000 sq/ft warehouse addition.

The Company is launching a \$10 million plus plant improvement program to upgrade and increase production at all three locations. The improvement program includes major version updates to software programs such as SAP 4 HANA and Workday; advanced training for Administrative Staff to develop data analysis skills; new equipment including beverage based equipment and almond paste equipment; added processing lines for almonds at all locations; and increasing operations at all three locations.

Training will provide workers with upgraded skill sets and cross-training on multiple machinery. Training courses will not be duplicated for trainees who received training under the previous Agreement.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

To meet customer demands, Blue Diamond is adding new equipment and production lines, and is expanding to a twenty-four/seven operation at all three locations. Additionally, over the last year, Blue Diamond has seen a revenue increase of 6.5% and projects an additional 5.4% increase in the next two years. The Company will hire 125 new employees (Job Numbers 3 & 4) to meet these demands. The date-of-hire for 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 be delivered via Class/Lab, E-Learning and Productive Lab in the following:

**Business Skills:** Training will be offered to all occupations and will provide skills to effectively and efficiently maintain business operations. Training topics include Sales/Marketing and Inside Out Coaching.

**Computer Skills:** Training will be offered to all occupations and improve software skills. Training topics include Adage, Kronos and Workday.

**Continuous Improvement:** Training will be offered to all occupations and focus on eliminating waste and improving Company processes. Training topics include 5S, Conflict Management, Managing Daily Operations and Problem Solving.

**Management Skills:** Training will be offered to Team Leads/Managers and focus on developing strong managerial skills. Training topics include Employee Engagement and Leadership Skills.

**Manufacturing Skills:** Training will be offered to all occupations except Administrative Staff. Training will improve worker knowledge of proper techniques for working with equipment and the production of the product. Training topics include Factory Talk, Good Manufacturing Practices and Machine Operation.

## **Certified Safety Training**

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 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.

## **Productive Laboratory**

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

Blue Diamond will train Operator Technicians, Lift Truck Drivers, Quality Inspectors, Machine Operators, Maintenance Staff and Team Leaders/Managers on pasteurization machinery and flour grinding mills in PL-Manufacturing Skills for approximately 60 hours. Since factory equipment cannot be reproduced in a classroom setting, PL training is necessary to ensure safety and production standards. This training will be at a much slower pace and will produce significantly higher product defects. In-house experts will conduct training and will first demonstrate how to use the equipment and then supervise trainees using the equipment. The trainer will attest to the trainee’s competency once training is completed.

Training will be provided at a 1:3 trainer-to-trainer ratio because trainees work in groups of 2-3 on the machinery.

## **High Unemployment Area**

Some trainees (Job Numbers 2 and 4) work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company’s locations in Stanislaus County are in an HUA.

### ➤ Wage Modification

The Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Blue Diamond is requesting a wage modification from \$16.70 per hour to \$12.53 per hour (Job Number 2) and \$13.66 per hour to \$11.00 per hour (Job Number 4).

## **Commitment to Training**

The current annual California training budget is approximately \$775,000 and includes new hire orientation and safety 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

The Senior Learning and Talent Development Consultant will oversee all project administration. A training coordinator at each location will assist with training and record keeping. Training will be provided by in-house experts and vendors as needed.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes Blue Diamond's performance under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0278	Salida, Sacramento, Turlock	10/1/16- 9/30/18	\$174,560	*\$0 (0%)
ET13-0237	Turlock	1/1/13 – 12/31/14	\$235,720	\$217,815 (92%)

\*Based on ETP Systems, 9480 reimbursable hours have been tracked for potential earnings of \$174,560 (100% of approved amount).

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

To Be Determined



**Exhibit B: Menu Curriculum****Class/Lab/E-Learning Hours**

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Crucial Conversations
- Inside Out Coaching
- Project Management
- Sales/Marketing
- Team Roles

**COMPUTER SKILLS**

- Adage
- CoMeEers
- I Maint
- Kronos
- Microsoft Office (Intermediate/Advanced)
- SAP 4 HANA
- Server
- SQL
- Workday

**CONTINUOUS IMPROVEMENT**

- 5S
- Building Trust
- Change Management
- Conflict Management
- Daily Directional Setting
- Data Center Training
- Department Factory Training
- Expert Trainer
- High Performance Teams.
- Key Performance Indicators
- LEAN
- Level 1 Trainer
- Managing Daily Operations
- Maximizing Strengths
- Problem Solving
- Quick Changeovers
- Site Factory Training

**MANAGEMENT SKILLS (Managers/Supervisors Only)**

- Developing High Performance Teams
- Developmental Planning
- Employee Engagement
- Establishing Performance Objectives
- Leadership Skills

**MANUFACTURING SKILLS**

- Factory Talk
- Food Safety
- Forklift
- Good Manufacturing Practices
- Lifts
- Line Testing
- Machine Maintenance
- Machine Operation
- Machine Sanitation
- Powered Industrial Trucks Training
- Quality Control
- Safety and Preventative Control

**OSHA 10/30** (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

**Productive Lab Hours**

0-60

**MANUFACTURING SKILLS** (Ratio 1:3)

- Bagging Equipment
- Butter Mill
- Dicing Machinery
- Dry Roasters
- Flavoring
- Flour Grinding Mills
- Forklift Training
- Grading Machinery
- Lift Training
- Line Testing
- Machine Maintenance
- Machine Sanitation
- Oil Rosters
- Packaging
- Pasteurization Equipment
- Powered Industrial Trucks Training
- Process Control Systems
- Shipping
- Sorting Machinery
- Tumblers
- Wastewater Equipment

Safety Training cannot exceed 10% of total training hours per-trainee.  
This cap does not apply to OSHA 10/30.

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:**

**DNC Parks & Resorts at Tenaya, Inc. dba Tenaya Lodge at Yosemite**

**Agreement Number: ET19-0325**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** C. Kaiser

**PROJECT PROFILE**

Contract Attributes:	Retrainee Job Creation Initiative HUA	Industry Sector(s):	Services (G)  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Fresno, Mariposa	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 3,200	U.S.:52,000	Worldwide: 60,000
<u>Turnover Rate:</u>	16%		
<u>Managers/Supervisors:</u> (% of total trainees)	10%		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
\$402,000

<b>Total ETP Funding</b>
\$302,472

**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, Continuous Impr	318	8-200	0	\$552	*\$16.70
				Weighted Avg: 24			
2	Retrainee HUA	Business Skills, Computer Skills, Continuous Impr	18	8-200	0	\$552	*\$12.53
				Weighted Avg: 24			
3	Retrainee Job Creation	Business Skills, Computer Skills, Continuous Impr	100	8-200	0	\$1,170	*\$13.66
				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 regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

**Minimum Wage by County:** Job Number 1: \$16.70 per hour for Mariposa County; Job Number 2: \$12.53 per hour for Fresno County; Job Number 3: \$13.66 per hour for Mariposa 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  
 Job Number 1: \$2.50 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1:</b>		
Administrative Staff		35
Engineering/Maintenance Staff		25
Food and Beverage Staff		142
Front Desk Staff		22
Housekeeping Staff		45
Managers/Supervisors		42
Security		7
<b>Job Number 2:</b>		
Sales		18
<b>Job Number 3:</b>		
Administrative Staff		1
Engineering/Maintenance Staff		2
Food and Beverage Staff		36

Front Desk Staff		1
Housekeeping Staff		47
Managers/Supervisors		1
Security		2
Tour Guides		10

## **INTRODUCTION**

Founded in 1990 and headquartered in Fish Camp, DNC Parks & Resorts at Tenaya, Inc. dba Tenaya Lodge at Yosemite (Tenaya Lodge) is a year round destination resort located 2 miles from the Yosemite National Park. Tenaya Lodge is one of the largest employers in Mariposa County. It has restaurants, a fitness center, spa treatment rooms, and over 302 rooms and cottages. The Company provides hospitality services to guests from all over the world that visit the national parks. The Company has three lodges, one each in Yosemite, Sequoia, and Kings Canyon National Parks and a sales office in Fresno County. Only the sales office in Fresno County and lodge in Mariposa County will participate in training. This will be the Company's second ETP Agreement; the second in the past five years.

### **Veterans**

The Company does not actively recruit for Veterans at this time.

## **PROJECT DETAILS**

In the prior Contract, Tenaya Lodge focused on training to maintain its AAA 4-diamond rating.

The Company must continue to improve hospitality, cleanliness, and comfort to keep the AAA 4-diamond rating. The Company will provide training to improve Satisfaction and Loyalty Tracking (SALT) scores, identifying areas of needed improvement.

Additionally, training will focus on Business Skills, Computer Skills, and Continuous Improvement for current and incoming staff. This training will help trainees prepare for the Company's new Zipline/Canopy Tours and tour bus lines and opening of 50 new cabins for a total of 100 rooms in the spring. The cabins and Zipline/Canopy Tours were put on hold due to an environmental study and two major fires that threatened the area. Tenaya Lodge has estimated over \$5 million in revenue will be generated just by the new additions by the end of 2019. Because of the new additions, current and incoming staff will need to be trained in areas such as service standards, leadership skills, quality improvement, resolving guest complaints, interpersonal skills, and decision making. Training will prepare the staff on proper procedures for operating and maintaining the tours and new cabins.

Other trainings, such as room standards techniques and meeting guest needs will be a focus for housekeeping staff and marketing, up-selling and closing skills will be a focus for sales and front desk staff. The training Tenaya Lodge is instituting will develop more efficient and experienced staff members and will increase customer experiences and support.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

Tenaya Lodge is expanding business by adding new services. With the increase of rooms and amenities, the Company will need to hire 100 new employees (Job Number 3). The date-of-hire for 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 be delivered via Classroom/Laboratory and E-Learning delivery methods. In-house subject matter experts and external training vendors may be utilized to deliver training in the following:

**Business Skills:** Training will be offered to all occupations to effectively and efficiently maintain business operations. Training topics include Advanced Telephone Techniques, Customer Focused Selling, and Service Standards.

**Computer Skills:** Training will be offered to all occupations to improve software skills. Training topics include Retail Pro, Halo Point of Sale, and Springer Miller Systems.

**Continuous Improvement:** Training will be offered to all occupations to improve Company practices. Training topics include Team Building, Leadership Skills, and Critical Thinking.

### **High Unemployment Area**

Trainees in Job Number 2 work in Fresno, a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%.

#### ➤ 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. Tenaya Lodge is requesting a wage modification from \$16.70 per hour to \$12.53 per hour for these trainees.

### **Commitment to Training**

Training will be provided by qualified in-house trainers. The Company’s annual training budget per facility is approximately \$200,000 for new employee orientation, safety training, OSHA-mandated training, sexual harassment prevention, diversification, and basic management 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

The Director of Human Resources will oversee administration of this project. Additionally, the Company retained National Training Company to assist with administration.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

The following table summarizes Tenaya Lodge's performance under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0348	\$390,000	12/31/16 – 12/30/18	414	0	0

Based on ETP Systems, 21,017 reimbursable hours have been tracked for potential earnings of \$343,200 (88% of approved amount). The Contractor projects final earnings of 88% based on training currently committed to and in progress through December 2018. Thus, this new proposal has been right-sized accordingly.

**DEVELOPMENT SERVICES**

National Training Company in Middletown 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**

To Be Determined

**Exhibit B: Menu Curriculum****Class/Lab and E-Learning Hours**

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accountability and Taking Responsibility
- Advanced Accounting Skills
- Advanced Communication Skills
- Advanced Telephone Techniques
- Coaching and Mentoring
- Confidentiality and Privacy of Client Data Procedures
- Customer Focused Selling
- Empowerment
- Getting Results Through Accountability
- Integrated Kitchen Procedures
- Job Specific Processes
- Learning How to Deal With Difficult People
- Making Change Work for You
- Marketing
- Motivation and Attitude Improvement
- Negotiating
- New Menu Presentation and Selling Skills
- Payroll
- PBX System
- Point of Sale
- Reducing Negativity in the Workplace
- Report Writing
- Resolving Guest Complaints
- Room Standards Techniques
- Service Standards
- Supervisory Skills
- Up-selling and Closing Skills

**COMPUTER SKILLS**

- Accounts Payable Software
- Accounts Receivable Software
- Computerized Inventory
- Customer Information Systems
- Halo Point of Sale
- Inventory Software
- Micros-Restaurant
- MS Office (Intermediate and Advanced)
- OSS/USS
- Outlook (Intermediate and Advanced)
- Retail Pro
- Springer Miller Systems

**CONTINUOUS IMPROVEMENT**

- Bus Maintenance



- Conflict Management
- Conflict Resolution
- Critical Thinking
- Decision Making
- Delegating
- Interpersonal Skills
- Improving Communication Skills with Guests
- Leadership Skills
- Measuring for Success
- Meeting Guests Needs
- Operating Tour Bus
- Problem Solving and Resolution
- Quality Improvement
- Resolving Guest Complaints
- Standard Work Procedures
- Team Building

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



**Training Proposal for:**  
**The Wine Group, Inc.**  
**Agreement Number: ET19-0294**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** D. Jordan

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee HUA	Industry Sector(s):	Manufacturing Food Processing (E)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Monterey, Kern, Tulare, Fresno, Madera, San Joaquin, Alameda	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No United Food and Commercial Workers - Wine, Distillery & Allied Workers, Local 186D		
Number of Employees in:	CA: 1,080	U.S.:1,211	Worldwide: 1,246
<u>Turnover Rate:</u>	11%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

**FUNDING DETAIL**

<b>In-Kind Contribution: (100% of Total ETP Funding Required)</b>
<b>\$1,300,000</b>

<b>Total ETP Funding</b>
<b>\$805,376</b>

**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 HUA Priority Rate	Continuous Impr, Computer Skills, Mfg. Skills	437	8-200	0	\$1,664	*\$12.53
				Weighted Avg: 64			
2	Retrainee Priority Rate	Continuous Impr, Computer Skills, Mfg. Skills	47	8-200	0	\$1,664	\$18.22
				Weighted Avg: 64			

\*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 Number 1(HUA): \$12.53 per hour in Fresno, Kern, Madera, San Joaquin, Monterey and Tulare Counties; Job Number 2: \$18.22 per hour in 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 \$0.53 per hour may be used to meet the Post-Retention Wage for Job Number 1 and up to \$1.42 per hour for Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff		33
Handlers		60
Leads		45
Logistics		28
Maintenance Staff		58
Operators		144
Supervisors		20
Technicians		14
Winemakers		22
Winery Workers		13
<b>Job Number 2</b>		
Maintenance Staff		4
Technicians		36
Winery Workers		7

## **INTRODUCTION**

Founded in 1981 and headquartered in Tracy, The Wine Group (TWG) ([www.thewinegroup.com](http://www.thewinegroup.com)) operates 13 wineries throughout the world, producing more than 56 million cases of wine in the U.S. Current brands include Cupcake, Concannon, Benziger, Corbett Canyon, Big House and Franzia. The Company is one of the world's largest wine producers. TWG currently employs 1,080 Californians throughout the state. The Company plans to train 484 workers in Alameda, Fresno, Kern, Madera, Monterey, San Joaquin and Tulare counties. This will be TWG's fourth ETP Agreement; the third in the last five years.

### **Veterans Program**

TWG recruits Veterans, though they are not included in the training population. TWG participates in various job hiring events from colleges to community job fairs. The Company also lists available positions on veteran-specific job boards.

### **Union Support**

Union letters of support are on file from United Food and Commercial Workers – Wine, Distillery & Allied Workers, Local 186D.

## **PROJECT DETAILS**

Under the previous Agreement, training focused on adapting staff to new technology advancements in the wine industry. This new proposal will emphasize upgraded equipment and specialized production processes. Skills in Lean Manufacturing, warehousing, and farming principles will be delivered to improve processes. Training on updated equipment will include bottling lines, holding tanks and can lines. Trainees will also be cross trained to allow the Company flexibility in assignments and coverage when departments are shorthanded.

Additionally, TWG has expanded into new markets both in the U.S. and internationally. Training will focus on sales, shipping, marketing and social media to meet customer expectations and requirements for International business.

There are training topics included in the curriculum that are similar to topics from the previous Agreement; however, most topics have been updated. Trainees will not receive duplicate training.

### **Training Plan**

Training will be delivered via Class/Lab Training in the following:

**Computer Skills:** Training will be delivered to all occupations. Training will help staff become more proficient with business software solutions in resource planning, inventory control, budgeting, marketing, manufacturing, service delivery and the impact of social media. Training will include SharePoint, JD Edwards and Social Media Consumer Impact software

**Manufacturing Skills:** Training will be offered to all occupations except Administrative Staff. Trainees will gain skills and knowledge to operate and maintain production equipment, ensure product quality, and implement best practices in manufacturing, wine processing, inventory control and warehousing. Trainees will have a full understanding of equipment, development, and packaging. Training will reduce production downtime and automate machine operations.

**Continuous Improvement:** Training will be offered to all occupations. Training includes interpersonal skills, performance and feedback, and marketing. Training will improve team building, communication, leadership and quality improvement.

## High Unemployment Area

Trainees in Job Number 1 work in Fresno, Kern, Madera, Monterey, San Joaquin and Tulare Counties, High Unemployment Areas (HUA) with unemployment exceeding the state average by at least 25%. 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. TWG is requesting a wage modification for 46 trainees in Job Number 1 from \$16.70 per hour to \$12.53 per hour.

## Commitment to Training

ETP funds will not displace the Company's existing financial commitment to training. The Company's annual training budget for California is approximately \$1.3 million, including new employee orientation, skills enhancement for professional growth, and continuing education courses. Safety training is provided in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

TWG will begin ETP training upon project approval. The Training Manager will administer the project. Additionally, Administrative Staff at each facility will assist with administration and manage duties at their own facility. The Company also retained a subcontractor, BLI Company, to assist with entering training data into the ETP system. Training will be delivered by in-house subject-matter experts and vendors, if necessary.

## RECOMMENDATION

Staff recommends approval of this proposal.

## PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0101	Madera, Ripon, McFarland, Fresno, Cutler, Sanger	07/01/2016– 06/30/2018	\$749,988	\$749,988 (100%)
ET14-0290	Madera, Ripon, McFarland, Fresno, Cutler, Sanger	02/03/2014– 02/02/2016	\$604,098	\$604,098 (100%)

## DEVELOPMENT SERVICES

BLI Co. in Salida assisted with development for a flat fee of \$8,000.

## ADMINISTRATIVE SERVICES

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

## TRAINING VENDORS

PSIG, Inc. of Oakhurst will provide Manufacturing Skills training. Other trainers will be identified as they are retained.

**Exhibit B: Menu Curriculum****Class/Lab Hours**

8-200

Trainees may receive any of the following:

- **COMPUTER SKILLS:**
  - SharePoint
  - Office 365
  - JD Edwards ERP
  - Social Media Consumer Impact
  
- **CONTINUOUS IMPROVEMENT:**
  - First Pass Quality
  - High Performance Work Teams
  - Interpersonal Skills
  - Marketing
  - Supervisory and Management Skills
  
- **MANUFACTURING SKILLS:**
  - Advanced Electrical
    - Motor Controls
    - Starters
    - Health Effects of Electricity
    - Shock Paths
    - Multi-Meters
    - Relays
    - PLC Refrigeration Control Panels
    - Activities and Precautions
  - Cellar Equipment and Operations
  - Crush Operations
  - Dock Safety
  - Electrical Troubleshooting
  - Equipment Center Standard Work
  - Housekeeping/GMP's
  - Line Flow
  - Maintenance Standard Work
  - Mobile Bottling Equipment
  - Packaging Equipment Maintenance and Operation of Mobile Unit
  - Packaging Mechanics
  - Refrigeration System
    - Flow
    - Pressure
    - Temperature
    - Release Valves
    - Troubleshooting and Energy Conservation
    - Two Stage, DX, Flooded - Troubleshooting
  - Shipping and Receiving Procedures
  - Total Quality Maintenance

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



# **UFCW**-WINE, DISTILLERY & ALLIED WORKERS, LOCAL 186D

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329 Downey Ave.  
Modesto, CA 95354-1297

Phone (209) 524-4245  
Fax (209) 524-7066

July 2, 2018

Employment Training Panel  
1100 "J" Street  
Sacramento, CA

RE: **Participation in the California Employment Training Panel**

Dear Employment Analyst:

As the representative of the employees of The Wine Group, we support the participation of our members in the training to be provided in the ETP project. As the Local representing the employees of The Wine Group we also support the training as something that we do not offer internally to our members as it is training specific to each plants environment and outside of our memberships qualifications.

Sincerely,

A handwritten signature in black ink that reads "Bill Hale".

Bill Hale  
President  
United Food and Commercial Workers, Local 186D



**Training Proposal for:**  
**California Manufacturing Technology Consulting**  
**Agreement Number: ET19-0336**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Paccarelli

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SB <100	Industry Sector(s):	MEC (H) Manufacturing (33) Aerospace Related Biotechnology and Life Sciences (54+) Services (61,71,72,81,92) Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$1,683,396		\$116,303 8%		\$1,799,699

In-Kind Contribution:	50% of Total ETP Funding Required	\$1,027,425
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**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	Cont. Imp., Mgmt. Skills, Business Skills, Computer Skills, Mfg. Skills, Literacy Skills	750	8-200	0	\$1,501	\$16.70
				Weighted Avg: 54			
2	Retrainee Priority Rate SB<100	Cont. Imp., Mgmt. Skills, Business Skills, Computer Skills, Mfg. Skills, Literacy Skills	449	8-200	0	\$1,501	\$16.70
				Weighted Avg: 54			

**Minimum Wage by County:** \$18.22 for Alameda, Contra Costa, Marin, San Francisco, San Mateo, Santa Clara and San Francisco Counties; \$17.54 for Los Angeles County; \$17.50 for Orange County; \$17.03 for San Diego County; \$16.80 for Sacramento County, \$16.70 for all other 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  
Participating employers may use up to \$2.50 per hour in health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		170
Technical Staff		200
Production Staff		370
Sales Staff		200
Frontline Supervisor		150
Manager		80
Owner (Job Number 2 only)		29

**INTRODUCTION**

Established in 1992, California Manufacturing Technology Consulting (CMTC) ([www.cmtc.com](http://www.cmtc.com)) is a private non-profit corporation affiliated with the US Department of Commerce, National Institute of Standards and Technology’s Hollings Manufacturing Extension Partnership program to assist small and medium-sized manufacturers in California improve their operational efficiencies and global competitiveness. Its mission is to create solutions for manufacturing growth and profitability supporting a thriving California’s manufacturing sector. Participating employers

are from all manufacturing sectors. Training provided to employers supports increased sales, investment and profits, creates and retains jobs, and improves productivity for business growth.

Since manufacturing plays a key role in providing high-paying jobs and contributing to the economy's productivity and growth, its health and well-being should be of major concern to policy makers. CMTC has strong partnerships with regional and state organizations and work with key industry associations to assure an effective and efficient program.

## **Veterans**

Although there is no Veterans component in this project, some participating employers have a hiring preference for Veterans, have Veterans on staff, and may include Veterans in the proposed trainee population.

## **PROJECT DETAILS**

### **Employer Demand**

This will be CMTC's 19th ETP Agreement, and the seventh within the last five years. Its customers are primarily small manufacturers that represent a cross section of manufacturing sectors, many are suppliers to Original Equipment Manufacturers. These companies face constant challenges to staying competitive and relevant in the supply chain. They require training on the latest advanced manufacturing technologies and, in some cases, basic lean and quality processes to ensure workers have the skills need to increase productivity and product quality.

Participating employers are seeking to upgrade the skills of their workers and improve internal processes. These employers are improving their workforce to support their remaining competitive position by cutting cost through gained productivity, diversify products for both new customer/market opportunity and retention of existing customers. Innovation and advanced manufacturing processes are the foundation for the continued success.

To remain competitive, some are expanding or adding to their product offerings, which necessitate a new way of doing business. CMTC's goal is to provide services that sustain and strengthen California manufacturers and to provide innovative services that address the needs of this important industry sector. The "core" group of employers consists of those in the priority industries and represents 82% of the requested funding.

### **Curriculum Development**

CMTC surveys California manufacturers to identify key barriers to growth, and the results are used to develop its curriculum. As part of the Manufacturing Extension Partnership (MEP) system, CMTC has the benefit of securing national and regional data on industry trends and needs. Most updates to its curriculum come from the feedback and efforts of the national system.

Training is customized based on overall company improvement goals and assessments to address each employer's specific needs for improvement and employees' job duties. Employer and trainee feedback is obtained regularly. Trainees submit course evaluations to trainers, while CMTC account managers meet with clients to review evaluations and ensure that program goals are being met. As an MEP Center, all clients are surveyed by an independent third party within six to twelve months after training ends to quantify impact from CMTC services and measure customer satisfaction.

CMTC also provides project management and administration. CMTC's oversight and project management allows the manufacturer to stay focused on achieving the training outcomes rather than diverting limited resources for administration. Prior to the start of training, individual employer assessments are conducted and the curriculum planned based on input from employers. Interviews are conducted with trainees and company management to determine the skills are used in the trainee's specific job and where gaps exist. Trainees bring workplace examples for lab exercises to ensure implementation of course principles. In addition, a company assessment is completed to better understand the company's overall goals, issues, customers and products. Based on the assessment results, a recommended curriculum is reviewed with the company and agreed upon, and a training matrix for employees and schedule is developed.

Each company receiving training through this proposal will provide information about its specific needs on the certification statement. Small manufacturers are seeking to upgrade worker skills and improve processes. The customized, on-site training is delivered by CMTC and its training partners. This partnership results in greater impact within the company by linking the client's overall goals for improvement with both the manufacturing improvement projects and the class/lab training.

### **Marketing and Support Costs**

CMTC is solely responsible for marketing. It has built strong relationships with many partners including City, County, regional economic development agencies; Chambers of Commerce; Industry Associations; Community Colleges and Universities; Small Business Development Centers; and Workforce Investment Boards. CMTC also works with many groups throughout the state including the Los Angeles Economic Development Corporation's Jobs Defense Council to focus efforts on maintaining the aerospace industry in Southern California; and AMPSoCal Innovative Manufacturing Communities Partnership to bring advanced manufacturing technologies and additive manufacturing to A&D supply base.

Activities include hosting workshops, new program development and expansion, promoting each other's services, and cross referrals to ensure employers are able to access all available resources. By leveraging these partnerships, CMTC expands the resources available to its customers.

CMTC is requesting 8% support costs, and staff supports, for employer assessment and recruitment. Its program success is based on spending a significant amount of upfront time doing needs assessments, creating action plans, customizing training programs, and ensuring that company leadership is committed to realizing the plan. It will also help ensure that CMTC can invest the time needed to design well-developed training plans so that goals are achieved.

### **Training Plan**

**Business Skills:** Training will be offered to all occupations to communicate more effectively and to provide quality customer service.

**Computer Skills:** Training will be offered to all occupations to become more proficient in E-Commerce, Enterprise and Manufacturing Management Systems and database applications.

**Continuous Improvement:** Training will be offered to all occupation in teamwork, process improvements, ISO standards, problem solving and related skills.

**Management Skills:-** Training will be offered to Managers, Supervisors and Owners to implement changes and become more effective leaders in high performance workplaces.

**Manufacturing Skills:** Training will be offered to Production Staff in shop measurements, geometric dimensions and tolerances, blueprint reading, additive manufacturing, smart manufacturing sensors, cyber-physical security and flexible-hybrid electronics. Training will improve productivity, product quality, plant efficiencies and reduce waste.

**Literacy Skills:** Training will be offered help employers meet the ongoing need to improve written and verbal communication skills for individuals for whom English is their second language. Production Staff must possess literacy skills to comprehend processes and procedures to ensure quality.

### **Commitment to 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

As a repeat ETP contractor, CMTC has established a robust system for administering its contracts. The project team will consist of the Training Manager and three dedicated full-time staff members who will oversee the training implementation and project administration.

Training will be conducted at participating employers' worksites and approximately 75% of training will be delivered by CMTC staff. Training vendors with extensive manufacturing expertise will deliver 25% of training. Trainers have extensive manufacturing expertise and most have a minimum of 15 years' experience working in a variety of manufacturing environments, including food, aerospace, automotive and other industries.

### **Impact/Outcome**

CMTC assists manufacturers to prepare for certification programs that are typically awarded on the basis of training, internal improvement, and certification by a third party. Participating employers could eventually achieve ISO, CE Mark, Continuous Energy Improvement, Cyber Security Compliance and Safe Quality Food certifications of completion. These certifications and/or product diversification often lead to new markets and increased sales, which ultimately help companies grow and provide workforce stability.

### **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 summarized performance by CMTC under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET18-0145	\$949,690	12/11/17-12/10/19	1,165	429	167

Based on the ETP Systems to date, 28,608 reimbursable hours have been tracked for potential earnings of \$712,623 (75% of approved amount). However, CMTC anticipates earnings of 100%.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned
ET17-0254	Statewide	11/01/16-10/31/18	\$949,850	\$812,195 (86%)*
ET16-0116	Statewide	08/01/15-07/31/17	\$1,199,745	\$1,199,745 (100%)
ET15-0139	Statewide	07/07/14 - 07/06/16	\$1,249,990	\$1,249,990 (100%)
ET13-0356	Statewide	05/01/13 - 04/30/15	\$849,940	\$849,940 (100%)
ET12-0333	Statewide	04/02/12 - 04/01/14	\$748,748	\$748,748 (100%)

\*Based on ETP Online Systems, 40,243 reimbursable hours have been tracked for potential earning of \$936,347 (99% of contract amount).

### **DEVELOPMENT SERVICES**

N/A

### **ADMINISTRATIVE SERVICES**

N/A

### **TRAINING VENDORS**

The following vendors have been retained to provide training:

Soldering.Biz (Los Alamitos) – Manufacturing Skills  
 FLEX LLC (Carlsbad) – Computer Skills

Other training vendors will be identified as they are retained.

**Exhibit B: Menu Curriculum****Class/Lab Hours**

8-200

Trainees may receive any of the following:

**CONTINUOUS IMPROVEMENT**

- Teams and Team Building
- Problem Solving
- Communication Skills
- Leadership Skills
- Leading Change
- Lean Manufacturing
- Implementing ISO 9001
- Implementing TS16949
- Implementing AS9100
- Implementing ISO 14001
- Implementing ISO 5001
- Safe Quality Food
- Environmental Management System Implementation
- Continuous Energy Improvement
- Six Sigma
- Design of Experiments
- Failure Mode and Effects Analysis
- Statistical Process Control
- Quality Function Deployment & New Management & Planning Tools
- Improving Process Cycle Times
- Quality Management Systems
- Quality Inspection
- Risk Management
- Supply Chain Optimization
- Production and Inventory Management
- Integrated Resource Management

**MANAGEMENT SKILLS** (Managers/Supervisors/Owners Only)

- Management/Supervisory Skills
- Family Business Management
- Strategic Planning and Policy Deployment

**BUSINESS SKILLS**

- Sales Skills
- Business Writing
- Conflict Management
- Effective Meeting Skills
- Financial Analysis Skills
- Goal Setting
- Project Management
- Negotiation Skills
- Presentation Skills
- Providing Quality Customer Service

- Time Management Skills
- Global Business and Exporting
- Innovation Engineering Management Systems
- New Product Development
- Technology Driven Market Intelligence

### **COMPUTER SKILLS**

- Enterprise Resource Planning
- Electronic Commerce and eBusiness
- Word Processing (Intermediate/Advanced)
- Spreadsheets (Intermediate/Advanced)
- Presentation Software
- Database Management
- CAD/CAM Software Training
- SolidWorks

### **MANUFACTURING SKILLS**

- Programmable Logic Controllers
- Soldering
- Blueprint Reading
- Shop Math and Geometric Dimensioning & Tolerancing
- CNC Programming
- Additive Manufacturing
- Surface Mount Technology: Manufacturing & Rework
- Printed Wiring Board Repair
- Through Hole Technology: Rework and Repair
- Sewing
- Productions Skills
- Equipment Operation
- FDA Good Manufacturing Practices
- Small Batch Manufacturing
- Large Batch Manufacturing
- Clean Room Technology
- Writing Standard Operating Procedures
- Product Submissions: Getting to Market
- Quality System Requirements, Good Manufacturing Practices & Inspections
- Requirements for Device Safety
- Manufacturing Logistics Management
- Value Energy Stream Mapping
- Smart Manufacturing Sensors
- Cyber-Physical Security
- Flexible-hybrid electronics
- Robotics

### **LITERACY SKILLS**

- Vocational English as a Second Language

Literacy skills training will not exceed 45% 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.



**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET19-0336  
Reference No: 19-0117 Page: 1 of 8

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Action Embroidery

Address: 1315 W Brooks St.

City, State, Zip: Ontario, CA 91762

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 200

Total # of full-time company employees in California: 120

Company: AMD International Technologies, LLC

Address: 1725 S. Campus Avenue

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 24

Total # of full-time company employees worldwide: 30

Total # of full-time company employees in California: 30

Company: Anlin Industries

Address: 1665 Tollhouse Road

City, State, Zip: Clovis, CA 93611-0523

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 200

Total # of full-time company employees worldwide: 350

Total # of full-time company employees in California: 350

Company: Bazz Houston International

Address: 12700 Western Ave.

City, State, Zip: Garden Grove, CA 92841

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 45

Total # of full-time company employees worldwide: 180

Total # of full-time company employees in California: 85

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET19-0336  
Reference No: 19-0117 Page: 2 of 8

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---

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: California Technical Plating LLC

---

Address: 11533 Bradley Ave.

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City, State, Zip: San Fernando, CA 91340-2519

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Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 10

---

Total # of full-time company employees worldwide: 62

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Total # of full-time company employees in California: 62

---

Company: Doggie Walk Bags

---

Address: 1005 Brioso Dr.

---

City, State, Zip: Costa Mesa, CA 92627-4501

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 7

---

Total # of full-time company employees worldwide: 7

---

Total # of full-time company employees in California: 7

---

Company: Domino Plastics Manufacturing Inc.

---

Address: 601 Gateway Court

---

City, State, Zip: Bakersfield, CA 93307-6827

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 12

---

Total # of full-time company employees worldwide: 21

---

Total # of full-time company employees in California: 21

---

Company: Dust Collector Services

---

Address: 1280 N. Sunshine Way

---

City, State, Zip: Anaheim, CA 92806

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 16

---

Total # of full-time company employees worldwide: 20

---

Total # of full-time company employees in California: 20

---

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET19-0336  
Reference No: 19-0117 Page: 3 of 8

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Dynamic Fabrication, Inc.

---

Address: 2615 Hickory St.

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City, State, Zip: Santa Ana, CA 92707-3713

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 14

---

Total # of full-time company employees worldwide: 16

---

Total # of full-time company employees in California: 16

---

Company: Elizabeth Shutters

---

Address: 525 S. Rancho Ave.

---

City, State, Zip: Colton, CA 92324-3240

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 25

---

Total # of full-time company employees worldwide: 45

---

Total # of full-time company employees in California: 45

---

Company: Far West Technology Inc.

---

Address: 330 S. Kellogg Ave., Ste. D

---

City, State, Zip: Goleta, CA 93117-3814

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 16

---

Total # of full-time company employees worldwide: 16

---

Total # of full-time company employees in California: 16

---

Company: Flux Power

---

Address: 985 Poinsettia Ave., Suite A

---

City, State, Zip: Vista, CA 92081

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 20

---

Total # of full-time company employees worldwide: 48

---

Total # of full-time company employees in California: 48

---

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting    CCG No.: ET19-0336  
Reference No: 19-0117    Page: 4 of 8

---

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Fuse Integration Inc.

---

Address: 1425 E. Street

---

City, State, Zip: San Diego, CA 92101

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 44

---

Total # of full-time company employees worldwide: 44

---

Total # of full-time company employees in California: 44

---

Company: Golden Valley & Associates, Inc. dba Cal Central Catering Trailers

---

Address: 3511 Finch Rd.

---

City, State, Zip: Modesto, CA 95357

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 22

---

Total # of full-time company employees worldwide: 22

---

Total # of full-time company employees in California: 22

---

Company: Great Western Eagle Packaging

---

Address: 1890 S Milliken Ave.

---

City, State, Zip: Ontario, CA 91761-2340

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 20

---

Total # of full-time company employees worldwide: 21

---

Total # of full-time company employees in California: 21

---

Company: Grimmway Enterprises Inc. (Construction and Automation Division)

---

Address: 12020 Malaga Road

---

City, State, Zip: Arvin, CA 93203-9527

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 30

---

Total # of full-time company employees worldwide: 3,869

---

Total # of full-time company employees in California: 3,337

---

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET19-0336  
Reference No: 19-0117 Page: 5 of 8

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---

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Inova Diagnostics

---

Address: 9900 Old Grove Rd.

---

City, State, Zip: San Diego, CA 92131

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 80

---

Total # of full-time company employees worldwide: 309

---

Total # of full-time company employees in California: 283

---

Company: Lambda Research Optics Inc.

---

Address: 1695 West MacArthur Blvd.

---

City, State, Zip: Costa Mesa, CA 92626

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 25

---

Total # of full-time company employees worldwide: 55

---

Total # of full-time company employees in California: 55

---

Company: LMC Enterprises, dba Flo-Kem

---

Address: 19402 Susana Road

---

City, State, Zip: Rancho Dominguez, CA 90221

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 20

---

Total # of full-time company employees worldwide: 120

---

Total # of full-time company employees in California: 117

---

Company: M & R Engineering Company

---

Address: 227 E. Meats Ave.

---

City, State, Zip: Orange, CA 92865-3311

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 45

---

Total # of full-time company employees worldwide: 61

---

Total # of full-time company employees in California: 61

---

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET19-0336  
Reference No: 19-0117 Page: 6 of 8

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Melfred Borzall, Inc.

Address: 2712 Airpark Drive

City, State, Zip: Santa Maria, CA 93455-1418

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 38

Total # of full-time company employees in California: 38

Company: North American Pet dba Pet Partners Inc.

Address: 450 N. Sheridan St.

City, State, Zip: Corona, CA 92880

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 37

Total # of full-time company employees worldwide: 37

Total # of full-time company employees in California: 35

Company: Northridge Tri-modality Imaging dba TriFoil Imaging

Address: 9457 De Soto Ave.

City, State, Zip: Chatsworth, CA 91311-4920

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 28

Total # of full-time company employees worldwide: 31

Total # of full-time company employees in California: 28

Company: Novotech Nutraceuticals Inc.

Address: 2897 Palma Drive

City, State, Zip: Ventura, CA 93003-7681

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 20

Total # of full-time company employees in California: 20

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET19-0336  
Reference No: 19-0117 Page: 7 of 8

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Pacific Spice Company, Inc.

---

Address: 6430 East Slauson Avenue

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City, State, Zip: Commerce, CA 90040

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 75

---

Total # of full-time company employees worldwide: 98

---

Total # of full-time company employees in California: 98

---

Company: Porto's Food Products, Inc.

---

Address: 2085 Garfield Avenue

---

City, State, Zip: Commerce, CA 90040

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 15

---

Total # of full-time company employees worldwide: 123

---

Total # of full-time company employees in California: 123

---

Company: Precision Resource

---

Address: 5803 Engineer Drive

---

City, State, Zip: Huntington Beach, CA 92649

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 25

---

Total # of full-time company employees worldwide: 2,500

---

Total # of full-time company employees in California: 135

---

Company: RadiaBeam Technologies, LLC

---

Address: 1717 Stewart Street

---

City, State, Zip: Santa Monica, CA 90404

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 20

---

Total # of full-time company employees worldwide: 45

---

Total # of full-time company employees in California: 43

---

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting    CCG No.: ET19-0336  
Reference No: 19-0117    Page: 8 of 8

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---

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Sungear, Inc.

---

Address: 8535 Arjons Dr., Ste. G

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City, State, Zip: San Diego, CA 92126

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 35

---

Total # of full-time company employees worldwide: 42

---

Total # of full-time company employees in California: 42

---

Company: West American Rubber Company, LLC

---

Address: 750 N. Main St.

---

City, State, Zip: Orange, CA 92868

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 28

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Total # of full-time company employees worldwide: 225

---

Total # of full-time company employees in California: 165

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**Training Proposal for:**

**Southern California Elevator Constructors Joint Apprenticeship and Training Committee**

**Agreement Number: ET19-0936**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Reeves

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Apprenticeship Veterans	Industry Sector(s):	MEC (H) Construction (23)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Imperial, Inyo, Kern, Los Angeles, Mono, Orange, Riverside, San Bernardino, San Diego, San Luis Obispo, Santa Barbara, Ventura	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Union of Elevator Constructors Local 18		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$778,700		\$53,890 8%		\$832,590

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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**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 Apprentice	Commercial Skills, OSHA 10/30	360	8-200	0	\$2,021	\$22.77
				Weighted Avg: 90			
2	Retrainee Apprentice Veterans	Commercial Skills, OSHA 10/30	30	8-200	0	\$2,021	\$22.77
				Weighted Avg: 90			
3	Retrainee Journeyman Priority Rate	Commercial Skills, OSHA 10/30	200	8-200	0	\$222	\$22.77
				Weighted Avg: 8			

**Minimum Wage by County:** \$22.77 per hour Statewide (SET 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 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
Apprentice Elevator Constructor		360
Veteran Apprentice Elevator Constructor		30
Journeyman Elevator Constructor		200

**INTRODUCTION**

Established in 2001, the Southern California Elevator Constructors Joint Apprenticeship and Training Committee (SoCal Elevator JATC) ([www.iueclocal18.org](http://www.iueclocal18.org)) serves 600 apprentices and 1,300 journey level elevator constructors. SoCal Elevator JATC provides training to apprentice and journeymen Elevator Constructors working in 12 Southern California counties. Elevator Constructors assemble, install, maintain, modernize, and replace elevators, escalators, chairlifts, moving walkways, and similar equipment in buildings. Workers are represented by the International Union of Elevator Constructors Local 18, which was founded 125 years ago. Employers are represented by the National Elevator Bargaining Association and Elevator Constructors of America. This is SoCal Elevator JATC's first ETP contract.

Elevator Constructors specialize in installation, maintenance, modernization or repair work. Maintenance and repair workers require greater knowledge of electronics, hydraulics, and electricity because a large part of maintenance and repair work involves troubleshooting. Most

elevators today have computerized control systems that are more complex and require a higher level of troubleshooting than in the past.

After an elevator is installed, workers must regularly maintain and service it to keep it working properly. They perform preventive maintenance, such as oiling and greasing moving parts, replacing worn parts, and adjusting equipment for optimal performance. They also troubleshoot and perform emergency repairs. Workers that specialize in elevator maintenance must be able to handle major repairs such as replacing cables, elevator doors, and machine bearings. These tasks require the use of cutting torches or rigging equipment. Repair crews also perform major modernization and alteration work such as replacing electric motors, hydraulic pumps, and control panels.

### **Veterans Program**

SoCal Elevator JATC will train 30 Veteran Apprentices (Job Number 2). The JATC participates in Helmets to Hardhats and gives veterans accelerated admission to its apprenticeship program.

### **Apprenticeship Program**

The Panel funds 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 supplements cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the program is four years.

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 \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

### **Employer Demand**

The demand for elevator construction, as well as the long-term service and repair of related equipment continues to grow at a rapid rate. As a result, the number of Elevator Constructor apprentices has increased by 80% in the past three years. ETP funds will help employers manage the growing volume of work in Southern California by providing workers with the skills to meet industry demand.

ETP funding will allow the SoCal Elevator JATC to train its members to install, service and maintain increasingly complex computer systems that control elevators today. Elevator modernization is the process of upgrading its critical parts to enable it to handle new technology, while performing more safely and efficiently. Typically, a modernization will affect the controller equipment, the hoist machines, and electrical wiring. The constant upgrading of elevators with new equipment and advanced technology continues to drive the need for increased apprentice and journeyman training.

In addition, ETP funding will help the JATC transition its program to include more hand-on competency testing, and expand the use of virtual elevator and escalator training devices. These virtual, three-dimensional computer programs help trainees improve their installation and troubleshooting skills.

## **PROJECT DETAILS**

All class/lab training will be center-based and delivered at the JATC's headquarters in Glendora and additional training facility in San Diego. Trainers are qualified journeymen with technical expertise and training experience.

### **Training Plan**

**Commercial Skills:** Training will include basic and advanced instruction in theory and practical application of skills needed by Elevator Constructors. Training will provide workers with the skills to read and interpret drawings/blueprints, assemble elevator cars, connect electrical wiring to control panels and motors, test newly installed equipment, troubleshoot malfunctions, dismantle elevator and/or escalator units, repair and/or replace faulty components, conduct preventive maintenance, and maintain service records.

**OSHA 10/30:** This training is a series of courses "bundled" by industry sector and occupation. Training will be delivered to Journeymen and Apprentice trainees based on their classifications to ensure safe working conditions on the job. The coursework is geared to construction work and manufacturing. Completion of 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 is not included in the 10% limitation on safety training.

### **Curriculum Development**

The Curriculum was developed by the national elevator industry with input from labor and management representatives. Training topics are customized to include new equipment and address changes in industry standards.

The JATC uses a series of "portable" labs that are stored at each training location to facilitate hands-on experiences with tools and equipment common to the job. The JATC also uses a desktop computer program that functions as a virtual elevator or escalator for training purposes.

### **Electronic Recordkeeping**

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

### **Marketing and Support Costs**

Participating employers are notified of training via websites, mailings, and program presentations. The JATC is requesting 8% support costs to assist with recruitment, employer outreach, and assessment of employer-specific job requirements. Although many of the participating employers have already been notified, additional outreach and needs assessments will take place throughout the contract term. Staff recommends the 8% support costs.

## **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 contract.

## **Commitment to Training**

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. ETP funds will not displace the existing financial commitment to training. Safety training is provided by participating employers in accordance with all pertinent requirements under state and federal law.

### ➤ **Training Infrastructure**

The JATC's Area Coordinator will oversee project administration. JATC staff will coordinate the scheduling of training. The Los Angeles Unified School District (LAUSD) is the Local Education Agency for the JATC. Each instructor will track attendance and forward records to the JATC, which will maintain the data in their LMS. Training data will be forwarded to LAUSD to ensure accuracy. LAUSD will forward data to Steve Duscha Advisories who will format the information per ETP standards and upload required data to ETP websites.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **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

Trainees may receive any of the following:

**Apprentice Training****COMMERCIAL SKILLS****Trade Skills**

- Introduction to Safety
- Safety During Construction and Modernization
- Safety During Maintenance and Repairs
- Alcohol and Other Drugs
- Introduction to OSHA
- Hazard Communication
- Personal Protective Equipment (PPE)
- Materials Handling
- Electrical Safety
- Tool Safety
- Fall Protection
- Stairways and Ladders
- Confined Spaces
- Motor Vehicle Safety
- Ergonomics
- Fire Safety
- Scaffold Safety
- Competent Person Training for Framed Scaffolds
- Training Program for Suspended Scaffolds
- Diversity and Success
- Care Studies
- Customer Relations
- Labor History and IUEC History
- Basic Mathematic Concepts
- Measurement
- Introduction to Installation Drawings
- Detail Drawings and Material Specifications

**Hoistway Structures**

- Tools and Material Handling
- Rigging and Hoisting
- Crosby Fasteners
- Pit Structure
- Introduction to Guide Rails
- Installation of Guide Rails
- Machine and Sheave Installation
- Elevator Control Equipment Installation
- Car and Counterweight Assembly and Roping
- Elevator Rope and Roping
- Reroping
- Elevator Cab Modernization, Refinishing and Floor Covering

**Electrical Fundamentals**

- Signed Numbers and Powers of 10
- The Metric System
- Equations and Formulas
- Ratio and Proportion
- Electrical Safety
- Basic Electricity Orientation
- Understanding the Relationship Between Voltage, Current and Resistance
- Basic Electrical Circuit Components
- Series and Parallel DC Resistive Circuits
- Alternating Current Theory
- Magnetism and Electromagnetism

**Electrical Theory & Application**

- Introduction to Analog and Digital Meters
- Transformers
- DC Generator and Motor Theory
- Components of DC Motors and Generators
- Types of DC Motors and Generators
- Maintenance and Service
- AC Motors

**Installation**

- Planning, Piping and Wiring
- Piping and Wiring the Machine Room and Hoistway
- Piping and Wiring the Car
- Start-Up Procedures
- Passenger Elevator Door and Entrance Installation
- Elevator Cab Assembly and Door Operators
- Freight Elevator Doors and Gates
- Freight Door Operators
- Dumbwaiters
- Machine Room Maintenance
- Hoistway Maintenance
- Asbestos Awareness

**Solid State**

- Mathematics for Ohm's Law
- Basic Components and Series and Parallel Resistance
- Magnetism, Electromagnetism, AC Theory and Transformers
- Capacitors and Capacitance
- Inductors and Inductance
- Diodes
- Transistors and Thyristors
- Analog Integrated Circuits
- Digital Integrated Circuits

**Power & Logic**

- Introduction to Circuit Tracing

- Relays and Timers
- Power and Power Control
- Logic Controls
- Constant Pressure Push Button Systems & Single Automatic Push Button Systems
- Collective Systems, Hydraulic Controller Theory & Troubleshooting
- Variable Voltage Selective Collective Systems

### **Advanced Topics in Elevators**

- Installing and Servicing the Jack
- Piping and Temporary Operation
- Basic Hydraulic Theory
- Hydraulic Elevator Maintenance
- Escalator Components and Installation Process
- Moving Walk Components and Installation Procedures
- Service Maintenance and Repair
- Residential and Limited Use/Limited Acquisition Elevators
- Residential and Limited Use/Limited Acquisition Platforms and Chair Lists
- Rack and Pinion Hoists

### **OSHA 10/30** (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

## **Journeyman Training**

### **COMMERCIAL SKILLS**

- DC Generators and Motors
- Solid State Theory and Application
- Solid state Theory and Application II
- Microprocessor-Based Control
- Solid State Motor Control
- Hydraulic Theory and Troubleshooting
- Reroping
- Customer Relations
- Escalators Series
- Door Operator Series
- Meters
- Maintenance
- Rack & Pinion
- Traveling Cable
- Limited Use/Limited Acquisition Lifts
- Asbestos
- Safety Testing for Code Compliance
- Scaffolding Competent Person Course
- Welding Training
- Signaling and Rigging
- Financial Tools for the Trades
- Advanced Hydraulic Valve Operating Adjustment and Troubleshooting
- Mechanic Review Eligibility



- Arc Flash Safety in the Workplace
- Virtual Escalator
- Forklift Certification
- Aerial Lift Certification
- Introduction to Automated People Movers

**OSHA 10/30** (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

Safety Training cannot exceed 10% of total training hours per-trainee. This cap does not apply to OSHA 10/30 training.

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



**Training Proposal for:  
California Manufacturers and Technology Association**

**Agreement Number: ET19-0321**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Mam

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SB <100 Entrepreneurial Veterans HUA	Industry Sector(s):	Manufacturing (E) Professional, Scientific, Technology (54) Aerospace Related Biotechnology and Life Sciences (54+)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Cement Mason Union Local 500, Teamsters District Council 2, Local 1964 International Longshoremen's Association AFL-CIO		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$887,402		\$62,378 8%		\$949,780

In-Kind Contribution:	50% of Total ETP Funding Required	\$1,341,000
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**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. Imprv., HAZMAT, HAZWOPER, Literacy Skills, Mgmt Skills, Mfg Skills, PL - Mfg. Skills, OSHA10/30	360	8-200	0-60	\$973	\$16.70
				Weighted Avg: 35			
2	Retrainee SB<100	Business Skills, Computer Skills, Cont. Imprv., HAZMAT, HAZWOPER, Literacy Skills, Mgmt Skills, Mfg Skills, PL - Mfg. Skills, OSHA10/30	463	8-200	0-60	\$834	\$16.70
				Weighted Avg: 30			
3	Retrainee	Business Skills, Computer Skills, Cont. Imprv., HAZMAT, HAZWOPER, Literacy Skills, Mgmt Skills, Mfg Skills, PL - Mfg. Skills, OSHA10/30	50	8-200	0-60	\$1,476	\$16.70
				Weighted Avg: 60			
4	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Cont. Imprv., HAZMAT, HAZWOPER, Literacy Skills, Mgmt Skills, Mfg Skills, PL - Mfg. Skills, OSHA10/30	99	8-200	0-60	\$1,140	*\$12.53
				Weighted Avg: 41			
5	Retrainee Priority Rate SB<100 HUA	Business Skills, Computer Skills, Cont. Imprv., HAZMAT, HAZWOPER, Literacy Skills, Mgmt Skills, Mfg Skills, PL - Mfg. Skills, OSHA10/30	14	8-200	0-60	\$667	*\$12.53
				Weighted Avg: 24			

6	Retrainee Veterans	Business Skills, Computer Skills, Cont. Imprv., HAZMAT, HAZWOPER, Literacy Skills, Mgmt Skills, Mfg Skills, PL - Mfg. Skills, OSHA10/30	14	8-200	0-60	\$732	\$16.70
				Weighted Avg: 24			
7	Priority Rate SET Entrepreneurial SB<100	Business Skills, Computer Skills, Cont. Imprv., HAZMAT, HAZWOPER, Literacy Skills, Mgmt Skills, Mfg Skills, PL - Mfg. Skills, OSHA10/30	8	8-200	0-60	\$889	N/A
				Weighted Avg: 32			

\*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 & 6:** \$18.22 per hour in Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara Counties; \$17.54 per hour in Los Angeles County; \$17.50 per hour in Orange County; \$17.03 per hour in San Diego County; \$16.80 per hour in Sacramento County; and \$16.70 per hour in all other counties.

**Job Numbers 4-5 (HUA):** \$13.25 per hour in Los Angeles County and \$12.53 for hour in Ventura County, Sutter County.

**Job Number 7 (SET/Entrepreneurial):** No wage requirement.

**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 up to \$2.50 per hour to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Support		50
Customer Service Representative		50
Sales Staff		25
Production Staff		125
Technician		150
Maintenance		150
Manager/Supervisor		200
Engineer		125
Analyst		125
Owner		8

## **INTRODUCTION**

California Manufacturers and Technology Association (CMTA) ([www.cmta.net](http://www.cmta.net)) is a trade association representing a large number of California's manufacturing, processing, service, and technology-based companies. Headquartered in Sacramento, CMTA has worked closely with its member companies and ETP to implement successful work skills training programs for over 20 years. CMTA's comprehensive advocacy and educational initiatives seek to foster a business environment that will lead to the creation and retention of high-wage, high-skill jobs that will enhance the overall prosperity of California. CMTA promotes training programs and policies that help manufacturers achieve higher performance. This will be CMTA's sixteenth ETP-funded project and fifth in the past five years.

### **Veterans Program**

The Panel has established a higher reimbursement rate and other incentives for training California veterans. CMTA will train 14 Veterans (Job Number 6) who have served on active full-time duty in the Armed Forces.

### **Union Support**

Union Letters of support have been submitted for their respective members of participating employers with collective bargaining agreements.

## **PROJECT DETAILS**

CMTA continues to serve member companies which need to improve productivity and efficiencies to remain competitive. In this proposal, CMTA will continue to collaborate with many of California's manufacturing companies including California craft breweries and distilleries. Within these industries, companies are experiencing significant growth and seek retraining to enhance employee skills. CMTA will also continue training on automation equipment which will require workers to receive technological and process improvement skills training necessary to be more efficient and productive. Furthermore, training will include new software products being implemented in the manufacturing sector such as AutoCAD, Simulation of Complex Design, and Cloud Computing.

CMTA is working with regional manufacturing groups such as the newly formed group in Sacramento called SVMI (Sacramento Valley Manufacturing Initiative). CMTA is helping to fund worker training programs that are backed by SVMI such as a pilot for CNC entry level operators. SVMI is organized by and for Sacramento's manufacturers. As the region's manufacturers, they are committed to working with educators and industry partners to proactively develop vocational, educational and workforce initiatives and programs leading to fulfilling manufacturing career paths for our region's students and workforce. Their efforts will ensure that the Sacramento area is viewed as a region of manufacturing excellence with a globally competitive manufacturing sector and a solid pipeline of skilled workers to showcase our region's success and expansion.

### **Training Plan**

The proposed training will mainly target manufacturers; however, companies from the aerospace, defense, and technology industries may also participate. CMTA serves companies statewide, training to improve productivity in order for companies to be competitive in California.

**Business Skills:** Training will be delivered to all occupations. Training will focus on improving customer service and business management. Training topics include Communication Skills, Customer Service, and Relationship Building Through Sales & Service.

**Computer Skills:** Training will be delivered to all occupations. Training will focus on becoming more proficient in the use of software platforms. Training topics include Accounting Software, Computer Security, and Custom Programming.

**Continuous Improvement:** Training will be provided to all occupations. Training will focus on reducing waste, increasing efficiencies and improving quality. Training topics include 5S Principles, ISO Training, and Lean Manufacturing.

**Hazardous Materials:** Training will be delivered to all manufacturing occupations. Staff will receive the skills necessary to ensure a safe work environment while working with dangerous materials. Training topics include Hazards Communication and Storm water Pollution Prevention Plan (SWPPP).

**Literacy Skills:** Training will be delivered to all manufacturing occupations. Training will focus on trainees that require improvement with the understanding of the English language as it pertains to their specific job duties. Training topic include Vocational English as a Second Language.

**Management Skills:** Training will be provided to Managers and Supervisors in leadership skills and managing change. Due to tough competition in the global economy, managers and supervisors must have the right training to allow them to keep the workforce engaged, productive and focused. Training topics include Leadership Skills, Managing Change, and Situational Leadership.

**Manufacturing Skills:** Training will be provided to Production Staff, Technicians and Maintenance. Training will focus on equipment upgrades and technical skills. Training topics include Good Manufacturing Practices (GMP), Programmable Logic Controllers (PLC), and Welding Fundamentals/Techniques.

### **Certified Safety Training**

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 production, maintenance, and technician 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. OSHA 10/30 is not included in the 10% limitation on 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 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.

### **Computer-Based Training**

CMTA will provide Computer-Based Training (CBT). CBT courses will primarily consist of Tooling U online training (<http://www.toolingu.com/>). Small business that find it difficult to stop production to train may take advantage of Tooling U. This will allow for full production to continue as trainees can be individually taken off their job to participate in CBT.

## **Productive Lab**

Trainees may produce goods for profit as part of the Productive Laboratory (PL) training in the courses identified under the Curriculum. The instructor must be dedicated 100% of the time to training delivery during all hours of PL training.

Participating employers under CMTA will train Production Staff, Maintenance, Managers/Supervisors and Technicians on CNC and manual equipment operations. Since factory equipment cannot be reproduced in a classroom setting, PL training is necessary to ensure safety and production standards are being met. This training will be provided at a much slower pace than regular production with significantly higher product defects. A subject matter expert will conduct training. The trainer will demonstrate how to use the equipment, then supervise trainees' use of the equipment. A department supervisor will certify trainee competency once training is completed.

PL training will be under constant supervision at a 1:2 trainer-to-trainee ratio. CMTA has requested a 1:2 ratio because trainees typically work in groups of two when assigned to a machine. PL training will be approximately 60 hours per trainee.

## **Special Employment Training/Entrepreneurial**

Trainees in Job Number 7 are funded under Special Employment Training (SET). The participating employers will not be required to demonstrate out-of-state competition and are not subject to a post-retention wage requirement as all trainees will be considered Entrepreneurs.

## **High Unemployment Area**

The 113 trainees in Job Numbers 4 and 5 work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. For facilities in HUAs, the Panel may modify the ETP Minimum Wage by up to 25% if post retention wages exceed the start-of-training wages. CMTA requests this wage modification for trainees in Job 4 and 5 from \$17.54 per hour to \$13.25 per hour for Los Angeles County and from \$16.70 per hour to \$12.53 per hour for Ventura and Sutter County.

## **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. Training varies by participating employer and is both job specific and companywide. Large employers have well-established training programs that include courses such as orientation, basic job skills, employee diversity and supervisory law. Other employers are only able to provide government-mandated training such as safety, compliance, and sexual harassment prevention. Many of the participating employers do not have structured training programs due to budgetary constraints. Training for these companies is generally provided on an as needed basis and can often be delayed. ETP funding will expand industry specific training to upgrade employee skill sets.

Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Training will be delivered primarily at the participating employers' worksites, with some center-based classes for employers with similar training needs. CMTA has partnered with three training subcontractors to deliver training in Continuous Improvement, Business, Computer and Manufacturing Skills. Participating employers will also provide qualified trainers who will train their own employees.

CMTA has three full-time staff members assigned to conduct employer marketing and recruitment, training needs assessments, skill gap analysis, trainer recommendations and selection, class scheduling, and compliance with all ETP documentation and tracking activities.

**Impact/Outcome**

Training will focus on Lean manufacturing, new technology, process improvement, effective communication, and certification training to standardize job skills and competencies. CMTA has partnered with the National Association of Manufacturers to implement a skills certification system to standardize competencies and basic skills. Training will provide employers with skilled workers for new production and growth opportunities.

Some trainees may earn a National Institute for Metalworking Skills (NIMS) certification. The certification sets skill standards for the industry, certifies individual skills against the standards, and accredits training programs that meet NIMS quality requirements. In addition, Engineers may receive a Microsoft Certified Systems Engineer certification.

**Marketing and Support Costs**

CMTA markets to an extensive database of current and potential members. Marketing activities are done through newsletters, workforce development partnerships, community colleges, trade shows, telemarketing, direct mailing, and in-person visits.

CMTA is requesting 8% support costs for the cost associated with employer recruitment; employer worksite visits to determine training needs; curricula design and scheduling of training; and assisting employers with training plan implementation. Staff recommends the 8% support costs.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

The following table summarizes Contractor's performance under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET18-0107	\$949,928	07/01/2017 – 06/30/2019	1092	237	237

Based on ETP Systems, 36,929 reimbursable hours have been tracked for potential earnings of \$741,125 (78% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through June of 2019.



**PRIOR PROJECTS**

The following table summarizes Contractor’s performance by CMTA under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0378	Sacramento	3/7/2016 – 3/6/2018	\$1,199,767	\$1,199,767 (100%)
ET15-0353	Sacramento	2/2/2015 – 2/1/2017	\$649,725	\$649,725 (100%)
ET14-0144	Sacramento	9/3/2013 – 9/2/2015	\$1,245,642	\$1,245,642 (100%)
ET12-0294	Sacramento	2/6/2012 – 2/5/2014	\$749,199	\$746,667 (99%)

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

Custom Corporate Communications in Redondo Beach will provide Continuous Improvement (Lean and Quality), Business and Computer Skills training for a fee of \$250,000.

Get Kaizened of San Ramon will provide Continuous Improvement (Lean and Six-Stigma) training for a fee of \$100,000.

Awareness Integrated Management of Roseville will provide Continuous Improvement (ISO) training for a fee of \$75,000.

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 Analytics Certification
- ✚ Business Fundamentals
- ✚ Communication Skills
- ✚ Cost Control
- ✚ Customer Service
- ✚ Financial Analysis
- ✚ International Shipping
- ✚ Inventory Control
- ✚ Negotiating
- ✚ Planning and Organizational Skills
- ✚ Presentation Skills
- ✚ Product Knowledge
- ✚ Project Management
- ✚ Relationship Building Through Sales & Service
- ✚ Sales Strategies
- ✚ Supply Chain Management
- ✚ Time Management Skills
- ✚ Writing Skills

#### **COMPUTER SKILLS**

- ✚ Accounting Software
- ✚ Agile/Scrum
- ✚ CAD/CAM
- ✚ CNC Software
- ✚ Computer Security
- ✚ Computer Skills for Equipment Maintenance
- ✚ Custom Programming
- ✚ Cybersecurity
- ✚ Database Management Training
- ✚ End-User Training
- ✚ Enterprise Resource Planning Software
- ✚ Geographic Information System (GIS) Training
- ✚ Microsoft Office (Intermediate/Advanced)

#### **CONTINUOUS IMPROVEMENT**

- ✚ 5S Principles
- ✚ AS9100/AS9110 Training
- ✚ Benchmarking
- ✚ Building Successful Teams
- ✚ Interpreting and Analyzing Data
- ✚ ISO Training
- ✚ Kaizen Methodology
- ✚ Leadership Skills for Front-Line Workers
- ✚ Lean Manufacturing
- ✚ Performance Management
- ✚ Problem Solving
- ✚ Quality Control Training

- + Root Cause Analysis
- + Six-Sigma
- + Standard Work
- + Statistical Process Control
- + Team Building
- + Team Problem Solving
- + Train the Trainer

### **HAZARDOUS MATERIALS**

- + Ammonia Training
- + Bloodborne Pathogen Safety
- + Environmental Health & Safety (EHS)
- + Hazardous Materials Handling, Storage, and Clean-Up
- + Hazards Communication
- + Stormwater Pollution Prevention Plan (SWPPP)

### **HAZWOPER**

- + HAZWOPER (Hazardous Waste Operation and Emergency Response)

### **LITERACY SKILLS**

- + Vocational English as a Second Language (VESL)

### **MANAGEMENT SKILLS (Managers & Supervisors Only)**

- + Leadership Skills
- + Managing Change
- + Performance Management
- + Situational Leadership

### **MANUFACTURING SKILLS**

- + Aerial Lift/Scissor Lift Training
- + American Welding Society Certified Welder
- + Assembly Procedures
- + Blueprint Reading
- + Brewing Basics
- + Certified Manufacturing Engineer
- + Certified Manufacturing Technologist
- + Certified Quality Engineer
- + Cicerone Certification Training
- + CNC Operator Certificate
- + Crane and Hoist Safety
- + Cross-Training in Equipment/Production
- + Electrical Safety
- + Electronics Training
- + Equipment Maintenance
- + Equipment Operations
- + Food Handling Basics
- + Forklift Training
- + Glass Handling
- + Good Manufacturing Practices (GMP)
- + Hydraulics Training
- + Industrial Math
- + Introduction to Practical Brewing
- + Intensive Brewing

- ✚ Job Instruction/Analyzing Jobs for Efficiency
- ✚ Lift Jack/Pallet Jack Safety
- ✚ Lock-Out/Tag-Out (LOTO) Training
- ✚ Machine/Equipment Safety
- ✚ Motor Controls
- ✚ National Institute for Metalworking Skills (NIMS) Certification Training
- ✚ Onsite Water Treatment Systems (OWTS)
- ✚ Personal Protective Equipment (PPE) Safety
- ✚ Pneumatics
- ✚ Press Brake Training
- ✚ Production Operations
- ✚ Programmable Logic Controllers (PLC)
- ✚ Science for Practical Brewing
- ✚ Shop Math
- ✚ Warehousing Operations & Distribution
- ✚ Welding Fundamentals/Techniques
- ✚ Wiring

### **OSHA 10/30**

- ✚ OSHA 10
- ✚ OSHA 30

Literacy Training cannot exceed 45% of total training hours per-trainee  
Safety Training cannot exceed 10% of total training hours per-trainee (This cap  
does not apply to Hazmat, OSHA 10/30 or HAZWOPER)

## **Productive Lab Hours**

0-60

### **MANUFACTURING SKILLS (1:2)**

- ✚ CNC Operator Certificate
- ✚ Cross-Training in Equipment/Production
- ✚ Power Tool Use/Handling
- ✚ Welding

## **CBT Hours**

0-60

### **BUSINESS SKILLS**

- ✚ Business Acumen (1 hour)
- ✚ Communication Skills (1 hour)
- ✚ Conflict Management (1 hour)
- ✚ Conflict Resolution for Different Groups 155 (1.5 hours)
- ✚ Conflict Resolution Principles 150 (1.5 hours)
- ✚ Essentials of Communication 120 (1.5 hours)
- ✚ Essentials of Leadership 110 (1.5 hours)
- ✚ Managing Change (1 hour)
- ✚ Personal Effectiveness 190 (1.5 hours)
- ✚ Team Leadership 160 (1.5 hours)

### **COMPUTER SKILLS**

- ✚ CAD/CAM Overview 160 (1.5 hours)
- ✚ Creating an EIA/ISO Program for the Mazak Mill 286 (1.5 hours)

- ✚ Creating an EIA/ISO Program for the Mazak Lathe 287 (1.5 hours)
- ✚ Creating a Mazatrol Program for the Mill 288 (1.5 hours)
- ✚ Creating a Mazatrol Program the for Lathe 289 (1.5 hours)
- ✚ Mazak Mill: Program Execution 290 (1.5 hours)
- ✚ Mazak Lathe: Program Execution 295 (1.5 hours)
- ✚ Mazak Mill: Program Storage 310 (1.5 hours)
- ✚ Mazak Lathe: Program Storage 315 (1.5 hours)
- ✚ Mazak Mill: First Part Runs 320 (1.5 hours)
- ✚ Mazak Lathe: First Part Runs 325 (1.5 hours)

### **CONTINUOUS IMPROVEMENT**

- ✚ 5S Overview 155 (1.5 hours)
- ✚ Applied and Engineering Sciences 110 (1.5 hours)
- ✚ Approaches to Maintenance 120 (1.5 hours)
- ✚ Approaches to Quality Management 255 (1.5 hours)
- ✚ Concepts of Calculus 310 (1.5 hours)
- ✚ Conducting an Internal Audits 200 (1.5 hours)
- ✚ Geometry: Circles and Polygons 185 (1.5 hours)
- ✚ Geometry: Lines and Angles 155 (1.5 hours)
- ✚ Geometry: Triangles 165 (1.5 hours)
- ✚ Intro to Six-Sigma 170 (1.5 hours)
- ✚ ISO 9000 Overview 110 (1.5 hours)
- ✚ Managing Practices for Total Quality 320 (1.5 hours)
- ✚ Math: Fractions and Decimals 105 (1.5 hours)
- ✚ Math: Fundamentals 100 (1.5 hours)
- ✚ Math: Units of Measurement 115 (1.5 hours)
- ✚ Quality and Customer Service 175 (1.5 hours)
- ✚ Quality Overview 100 (1.5 hours)
- ✚ Shop Algebra Overview 200 (1.5 hours)
- ✚ Shop Geometry Overview 170 (1.5 hours)
- ✚ Shop Trig Overview 210 (1.5 hours)
- ✚ Six Sigma Goals and Tools 310 (1.5 hours)
- ✚ Statistics 220 (1.5 hours)
- ✚ Trig: Pythagorean Theorem 205 (1.5 hours)
- ✚ Trig: Sine Bar Applications 225 (1.5 hours)
- ✚ Trig: Sine, Cosine, and Tangent 215 (1.5 hours)
- ✚ Troubleshooting: Identifying Problems 180 (1.5 hours)
- ✚ Troubleshooting: Understanding Causes and Effects 182 (1.5 hours)
- ✚ Troubleshooting: Taking Corrective Actions 184 (1.5 hours)

### **HAZARDOUS MATERIALS**

- ✚ Bloodborne Pathogens 115 (1.5 hours)
- ✚ Confined Spaces 190 (1.5 hours)
- ✚ Environmental Safety Hazards 150 (1.5 hours)
- ✚ Flammable/Combustible Liquids 155 (1.5 hours)
- ✚ Intro to OSHA 100 (1.5 hours)
- ✚ Personal Protective Equipment 120 (1.5 hours)
- ✚ Respiratory Safety 195 (1.5 hours)
- ✚ SDS and Hazard Communication 160 (1.5 hours)

### **MANAGEMENT SKILLS**

- ✚ Intro to Managerial Accounting 145 (1.5 hours)
- ✚ Managing the Diverse Workplace 210 (1.5 hours)

### **MANUFACTURING SKILLS**

- ✚ ANSI Insert Selection 250 (1.5 hours)
- ✚ Band Saw Blade Selection 215 (1.5 hours)
- ✚ Basic Measurement 110 (1.5 hours)
- ✚ Basic Programming 250 (1.5 hours)
- ✚ Basics of Ladder Logic 220 (1.5 hours)
- ✚ Basics of Manufacturing Costs 140 (1.5 hours)
- ✚ Basics of the CMM 120 (1.5 hours)
- ✚ Basics of the CNC Machining Center 130 (1.5 hours)
- ✚ Basics of the CNC Swiss-Type Lathe 135 (1.5 hours)
- ✚ Basics of the Engine Lathe 115 (1.5 hours)
- ✚ Basics of the Manual Mill 110 (1.5 hours)
- ✚ Basics of the Optical Comparator 130 (1.5 hours)
- ✚ Basics of Tolerance 120 (1.5 hours)
- ✚ Benchwork and Layout Operations 210 (1.5 hours)
- ✚ Blueprint Reading 130 (1.5 hours)
- ✚ Calibration Fundamentals 210 (1.5 hours)
- ✚ Canned Cycles 310 (1.5 hours)
- ✚ Carbide Grade Selection 230 (1.5 hours)
- ✚ Cell Design and Pull Systems 160 (1.5 hours)
- ✚ Chucks, Collets, and Vises 110 (1.5 hours)
- ✚ Clamping Basics 108 (1.5 hours)
- ✚ CNC Coordinates 140 (1.5 hours)
- ✚ CNC Manual Operations 200 (1.5 hours)
- ✚ CNC Offsets 210 (1.5 hours)
- ✚ CNC Specs for the Lathe 225 (1.5 hours)
- ✚ CNC Specs for the Mill 220 (1.5 hours)
- ✚ Conducting Kaizen Events 260 (1.5 hours)
- ✚ Creating a Milling Program 290 (1.5 hours)
- ✚ Creating a Turning Program 280 (1.5 hours)
- ✚ Cutting Fluids 210 (1.5 hours)
- ✚ Cutting Processes 140 (1.5 hours)
- ✚ Cutting Tool Materials 220 (1.5 hours)
- ✚ Cutting Variables 200 (1.5 hours)
- ✚ Data Manipulations 360 (1.5 hours)
- ✚ Drill Bushing Selection 230 (1.5 hours)
- ✚ Drill Geometry 247 (1.5 hours)
- ✚ Engine Lathe Operation 225 (1.5 hours)
- ✚ Equipment/Tool Design and Development 136 (1.5 hours)
- ✚ Fixture Body Construction 200 (1.5 hours)
- ✚ Fixture Design Basics 210 (1.5 hours)
- ✚ Haas Lathe: Control Panel Overview 255 (1.5 hours)
- ✚ Haas Lathe: Entering Offsets 265 (1.5 hours)
- ✚ Haas Lathe: First Part Runs 325 (1.5 hours)
- ✚ Haas Lathe: Locating Program Zero 275 (1.5 hours)
- ✚ Haas Lathe: Program Execution 285 (1.5 hours)
- ✚ Haas Lathe: Program Storage 315 (1.5 hours)
- ✚ Haas Mill: Control Panel Overview 250 (1.5 hours)
- ✚ Haas Mill: Entering Offsets 260 (1.5 hours)
- ✚ Haas Mill: First Part Runs 320 (1.5 hours)

- ✚ Haas Mill: Locating Program Zero 270 (1.5 hours)
- ✚ Haas Mill: Program Execution 280 (1.5 hours)
- ✚ Haas Mill: Program Storage 310 (1.5 hours)
- ✚ Hand and Power Tool Safety 145 (1.5 hours)
- ✚ Hand-Held Programmers of PLCs 280 (1.5 hours)
- ✚ Hard Turning 315 (1.5 hours)
- ✚ Hardness Testing 260 (1.5 hours)
- ✚ Hardware for PLCs 210 (1.5 hours)
- ✚ High-Speed Machining 310 (1.5 hours)
- ✚ Hole Inspection 240 (1.5 hours)
- ✚ Holmaking on the Mill 230 (1.5 hours)
- ✚ Inspecting with CMMs 220 (1.5 hours)
- ✚ Inspecting with Optical Comparators 230 (1.5 hours)
- ✚ Intepreting GD&T 310 (1994) (1.5 hours)
- ✚ Intepreting GD&T 315 (2009) (1.5 hours)
- ✚ Interpreting Blueprints 230 (1.5 hours)
- ✚ Intro to EDM 100 (1.5 hours)
- ✚ Intro to GD&T 200 (1994) (1.5 hours)
- ✚ Intro to GD&T 205 (2009) (1.5 hours)
- ✚ Intro to Machining Rigging 110 (1.5 hours)
- ✚ Intro To PLCs 200 (1.5 hours)
- ✚ Intro to Screw Machining 160 (1.5 hours)
- ✚ Intro to Supply Chain Management 140 (1.5 hours)
- ✚ Intro to Workholding 104 (1.5 hours)
- ✚ Lean Manufacturing Overview 130 (1.5 hours)
- ✚ Lifting and Moving Equipment 130 (1.5 hours)
- ✚ Linear Instrument Characteristics 115 (1.5 hours)
- ✚ Locating Devices 107 (1.5 hours)
- ✚ Lockout/Tagout Procedures 130 (1.5 hours)
- ✚ Machine Guarding 140 (1.5 hours)
- ✚ Machines for Metal Cutting 130 (1.5 hours)
- ✚ Machining Titanium Alloys 325 (1.5 hours)
- ✚ Manual Mill Operation 220 (1.5 hours)
- ✚ Manufacturing Management 180 (1.5 hours)
- ✚ Manufacturing Process Applications: Part I 124 (1.5 hours)
- ✚ Manufacturing Process Applications: Part II 125 (1.5 hours)
- ✚ Math of PLCs 320 (1.5 hours)
- ✚ Mazak Lathe: Control Panel Overview 255 (1.5 hours)
- ✚ Mazak Lathe: Entering Offsets 285 (1.5 hours)
- ✚ Mazak Lathe: Locating Program Zero 275 (1.5 hours)
- ✚ Mazak Lathe: Safety for the Lathe 265 (1.5 hours)
- ✚ Mazak Mill: Control Panel Overview 250 (1.5 hours)
- ✚ Mazak Mill: Entering Offsets 280 (1.5 hours)
- ✚ Mazak Mill: Locating Program Zero 270 (1.5 hours)
- ✚ Mazak Mill: Safety for the Mill 260 (1.5 hours)
- ✚ Measuring System Analysis 300 (1.5 hours)
- ✚ Metal Removal Processes 110 (1.5 hours)
- ✚ Metalworking Fluid Safety 165 (1.5 hours)
- ✚ Metrics for Lean 230 (1.5 hours)
- ✚ Milling Calculations 295 (1.5 hours)
- ✚ Milling Geometry 245 (1.5 hours)
- ✚ Networking for PLCs 270 (1.5 hours)
- ✚ Noise Reduction and Hearing Conservation 170 (1.5 hours)
- ✚ Numbering Systems and Codes 230 (1.5 hours)



- ✚ Optimizing Insert Life 305 (1.5 hours)
- ✚ Overview of Engine Lathe Setup 205 (1.5 hours)
- ✚ Overview of Manual Mill Setup 200 (1.5 hours)
- ✚ Overview of PLC Registers 305 (1.5 hours)
- ✚ Overview of Threads 150 (1.5 hours)
- ✚ Part Program 150 (1.5 hours)
- ✚ PID for PLCs 350 (1.5 hours)
- ✚ PLC Diagrams and Programs 300 (1.5 hours)
- ✚ PLC Inputs and Outputs 240 (1.5 hours)
- ✚ PLC Installation Practices 340 (1.5 hours)
- ✚ PLC Program Control Instructions 310 (1.5 hours)
- ✚ PLC Timers and Counters 260 (1.5 hours)
- ✚ Powered Industrial Truck Safety 210 (1.5 hours)
- ✚ Process Design and Development 135 (1.5 hours)
- ✚ Process Flow Charting 240 (1.5 hours)
- ✚ Product Design and Development 134 (1.5 hours)
- ✚ Rigging Equipment 120 (1.5 hours)
- ✚ Rigging Inspection and Safety 210 (1.5 hours)
- ✚ Rigging Mechanics 220 (1.5 hours)
- ✚ Safety for Lifting Devices 135 (1.5 hours)
- ✚ Safety for Metal Cutting 115 (1.5 hours)
- ✚ Sawing Fundamentals 155 (1.5 hours)
- ✚ Sequencer Instructions for PLCs 330 (1.5 hours)
- ✚ Shift Registers 370 (1.5 hours)
- ✚ SPC Overview 210 (1.5 hours)
- ✚ Speed and Feed Selection 300 (1.5 hours)
- ✚ Strategies for Setup Reduction 250 (1.5 hours)
- ✚ Supporting and Locating Principles 106 (1.5 hours)
- ✚ Surface Measurement 140 (1.5 hours)
- ✚ Taper Turning on the Engine Lathe 240 (1.5 hours)
- ✚ Thread Inspection 250 (1.5 hours)
- ✚ Threading on the Engine Lathe 235 (1.5 hours)
- ✚ Tool Geometry 240 (1.5 hours)
- ✚ Toolholders for Turning 260 (1.5 hours)
- ✚ Total Productive Maintenance Overview 150 (1.5 hours)
- ✚ TS 16949: 2009 Overview 220 (1.5 hours)
- ✚ Turning Calculation 285 (1.5 hours)
- ✚ Value Stream Mapping: The Future State 305 (1.5 hours)
- ✚ Value Stream Mapping: The Present State 300 (1.5 hours)
- ✚ Walking and Working Surfaces 180 (1.5 hours)
- ✚ What Is Cutting? 120 (1.5 hours)

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



**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturers & Technology Association    CCG No.: ET19-0321  
Reference No: 19-0087    Page 1 of 8

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: 25  
23 Bottles of Beer, LLC (Russian River Brewing Company)

---

Address: 1812 Ferdinand Court

---

City, State, Zip: Santa Rosa, CA 95404

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 40

---

Total # of full-time company employees worldwide: 81

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Total # of full-time company employees in California: 81

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Company: CAMBRO

---

Address: 5801 Skylab Road

---

City, State, Zip: Huntington Beach, CA 92647

---

Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 200

---

Total # of full-time company employees worldwide: 781

---

Total # of full-time company employees in California: 243

---

Company: Clos Du Val Wine Company, Ltd.

---

Address: 5330 Silverado Trail

---

City, State, Zip: Napa, CA 94558

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 20

---

Total # of full-time company employees worldwide: 39

---

Total # of full-time company employees in California: 37

---

Company: Crimson Wine Group

---

Address: 2700 Napa Valley Corporate Drive Suite B

---

City, State, Zip: Napa, CA 94558

---

Collective Bargaining Agreement(s): No

---

Estimated # of employees to be retrained under this Agreement: 60

---

Total # of full-time company employees worldwide: 132

---

Total # of full-time company employees in California: 132

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**Participating Employers in Retrainee  
Multiple Employer Contracts**

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Contractor's Name: California Manufacturers & Technology Association    CCG No.: ET19-0321  
Reference No: 19-0087    Page 2 of 8

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Company: Denso Products and Services, Americas Inc.

---

Address: 3900 Via Oro Avenue

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City, State, Zip: Long Beach, CA 90810

---

Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 100

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Total # of full-time company employees worldwide: 502

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Total # of full-time company employees in California: 502

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Company: Earl's Organic Produce

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Address: 2101 Jerrold Avenue, Suite 100

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City, State, Zip: San Francisco, CA 94124

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Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 60

---

Total # of full-time company employees worldwide: 110

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Total # of full-time company employees in California: 110

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---

Company: EPIC Sacramento

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Address: 1765 Challenge Way, Suite 200

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City, State, Zip: Sacramento, CA 95815

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Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 100

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Total # of full-time company employees worldwide: 1300

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Total # of full-time company employees in California: 400

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Company: Grauling Research Inc.

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Address: 3225 Regional Pkwy.

---

City, State, Zip: Santa Rosa, CA 95403

---

Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 5

---

Total # of full-time company employees worldwide: 3

---

Total # of full-time company employees in California: 3

---

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturers & Technology Association    CCG No.: ET19-0321

Reference No: 19-0087

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Company: Littorai Wines

---

Address: 788 Gold Ridge Road

---

City, State, Zip: Sebastopol, CA 95444

---

Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 6

---

Total # of full-time company employees worldwide: 6

---

Total # of full-time company employees in California: 6

---

Company: Marne Construction

---

Address: 749 No. Poplar Street

---

City, State, Zip: Orange, CA 92868

---

Collective Bargaining Agreement(s): Yes

---

Estimated # of employees to be retrained under this Agreement: 30

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Total # of full-time company employees worldwide: 73

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Total # of full-time company employees in California: 73

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Company: Mercury Plastics

---

Address: 14825 Salt Lake Ave.

---

City, State, Zip: City of Industry, CA 91746

---

Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 40

---

Total # of full-time company employees worldwide: 101

---

Total # of full-time company employees in California: 101

---

Company: Mi Rancho

---

Address: 425 Hester Street

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City, State, Zip: San Leandro, CA 94577

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Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 125

---

Total # of full-time company employees worldwide: 170

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Total # of full-time company employees in California: 170

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**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturers & Technology Association    CCG No.: ET19-0321

Reference No: 19-0087

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Company: Mission Critical Composite

Address: 15400 Graham Street, Suite 102

City, State, Zip: Huntington Beach, CA 92649

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 12

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Company: Newegg Inc. Location 1

Address: 9997 Rose Hills, Road

City, State, Zip: Whittier, CA 90601

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 3007

Total # of full-time company employees in California: 1142

Company: Newegg Inc. Location 2

Address: 166839 E. Gate Ave

City, State, Zip: City of Industry, CA 91745

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 3007

Total # of full-time company employees in California: 1142

Company: Performance Team

Address: 2240 E. Maple Ave

City, State, Zip: El Segundo, CA 90245

Collective Bargaining Agreement(s): Yes

Estimated # of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 498

Total # of full-time company employees in California: 498

**Participating Employers in Retrainee  
Multiple Employer Contracts**

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Contractor's Name: California Manufacturers & Technology Association    CCG No.: ET19-0321  
Reference No: 19-0087    Page 5 of 8

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Company: PinnPack

Address: 1151 Pacific Ave

City, State, Zip: Oxnard, CA 93033

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 100

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Company: Pitney Bowes

Address: 250 Airport Cir #101

City, State, Zip: Corona, CA 92880

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 14,900

Total # of full-time company employees in California: 334

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Company: Prolacta Bioscience

Address: 757 Baldwin Park Blvd.

City, State, Zip: City of Industry, CA 91746

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 200

Total # of full-time company employees worldwide: 272

Total # of full-time company employees in California: 272

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Company: Providien

Address: 2731 Loker Ave West

City, State, Zip: Carlsbad, CA 92010

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 99

Total # of full-time company employees in California: 99

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**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturers & Technology Association    CCG No.: ET19-0321

Reference No: 19-0087

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Company: Pulmuone Feeds USA, Inc.

Address: 2315 Moore Ave

City, State, Zip: Fullerton, CA 92833

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 350

Total # of full-time company employees in California: 350

Company: Rain for Rent

Address: 6400 Fischer Road

City, State, Zip: Riverside, CA 92057

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 1942

Total # of full-time company employees in California: 558

Company: SMC LTD.

Address: 3250 Brickway Blvd.

City, State, Zip: Santa Rosa, CA 95403

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 190

Total # of full-time company employees worldwide: 1475

Total # of full-time company employees in California: 250

Company: Smuffitt Kappa

Address: 1161 E. Walnut Street

City, State, Zip: Carson, CA 90746

Collective Bargaining Agreement(s): Yes

Estimated # of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 47,000

Total # of full-time company employees in California: 1,500

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturers & Technology Association    CCG No.: ET19-0321

Reference No: 19-0087

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Company: Sonoma Beverage Works dba Sonoma Cider

Address: 30C Mill Street

City, State, Zip: Healdsburg, CA 95448

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 45

Total # of full-time company employees in California: 45

Company: Tawa

Address: 6281 Regio Ave.

City, State, Zip: Buena Park, CA 90620

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 400

Total # of full-time company employees in California: 400

Company: Tomales Bay Foods

Address: 2080 Lakeville Highway

City, State, Zip: Petaluma, CA 94954

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 100

Company: Tri Tool Inc.

Address: 3041 Sunrise Blvd.

City, State, Zip: Rancho Cordova, CA 95742

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 140

Total # of full-time company employees in California: 118

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: California Manufacturers & Technology Association    CCG No.: ET19-0321

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Reference No: 19-0087

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Company: Valley Truck and Tractor Company

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Address: 1003 Stabler Lane

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City, State, Zip: Yuba City, CA 95993

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Collective Bargaining Agreement(s): No

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Estimated # of employees to be retrained under this Agreement: 100

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Total # of full-time company employees worldwide: 170

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Total # of full-time company employees in California: 170

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# CEMENT MASONS LOCAL NO. 500

O.P. & C.M.I.A. - A.F.L.-C.I.O.

1012 E. Cooley Drive, Suite A, Colton, CA 92324

OFFICE PHONE: (714) 554-0730 • FAX: (714) 265-0780

[www.cementmasonslocal500.org](http://www.cementmasonslocal500.org)



*Jack Alvarado*

Financial Secretary-Treasurer  
Business Manager

May 18, 2018

Executive Director  
Employment Training Panel  
1100 J Street, 4<sup>th</sup> Floor  
Sacramento, CA 95814

Dear ETP,

I am writing on behalf of the Cement Mason Union Local 500. We support the proposed training funded in part by the Employment Training Panel.

This training will assist Marne Construction in meeting company training goals and contribute to our members professional growth and development.

Sincerely,

Jack Alvarado  
Financial / Business Manager



# TEAMSTERS DISTRICT COUNCIL 2

Affiliated with the Graphic Communications Conference-International Brotherhood of Teamsters  
Affiliated Local Unions 388M, 747M, 28N, 541S, 543M, 625S

## Main Business Office

710 E. Commonwealth Avenue, Fullerton, CA 92831-3842  
(714) 447-3382 Fax (714) 447-3385 (800) 333-4388

## Northern California/Colorado/Utah/Nebraska

6111 Southfront Rd., Suite R, Livermore, CA 94551  
(925) 960-1295 (925) 960-1297 Fax (925) 960-1285 (800) 333-4388

## Oregon/Washington/Idaho

2233 N. Lombard, Portland, OR 97217-5737  
(503) 285-0529 Fax (503) 283-4801 (800) 333-4388

August 8, 2018

Executive Director  
Employment Training Panel  
1100 J Street, 4<sup>th</sup> Floor  
Sacramento, CA 95814

Dear ETP,

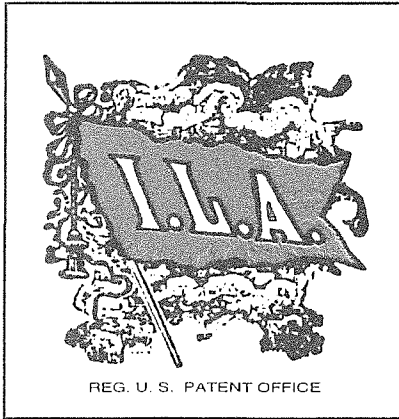
I am writing on behalf of Teamsters District Council 2, Local 388M. We support the proposed training funded in part by the Employment Training Panel.

This training will assist our members in meeting their goals.

Sincerely,

Daniel Cabada  
President

DC:sc



INTERNATIONAL LONGSHOREMEN'S ASSOCIATION  
UNION LOCAL 1964

AFL - CIO and CLC

- NEW JERSEY
- NEW YORK
- CONNECTICUT
- MASSACHUSETTS

11 Teaneck Road  
Ridgefield Park, NJ 07660  
(201) 440-6525  
FAX (201) 440-3288



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- ILLINOIS
- CALIFORNIA
- PENNSYLVANIA

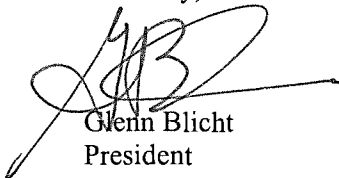
September 11, 2018

Executive Director  
Employment Training Panel  
1100 J Street, 4<sup>th</sup> Floor  
Sacramento, CA 95814

Dear ETP,

I am writing on behalf of the Local 1964 International Longshoremen's Association AFL- CIO. We support the proposed training funded in part by the Employment Training Panel as the training will further educate, prepare and help our members improve their overall skill sets and ultimately, their ability to thrive in a safer and more productive work environment.

Sincerely,



Glenn Blicht  
President

**Contract Services Administration  
Training Trust Fund**

**WITHDRAWN**



**Training Proposal for:  
Northern California Valley Sheet Metal Industry Joint  
Apprenticeship Training Committee**

**Agreement Number: ET19-0932**

**Panel Meeting of:** December 7, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Jones

**PROJECT PROFILE**

Contract Attributes:	Retrainee Apprenticeship Veterans Priority Rate Journeyman	Industry Sector(s):	Construction (C) Services (61,71,72,81,92)  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Northern California	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Sheet Metal Workers Local Union No. 104		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$280,355		\$19,473 8%		\$299,828

<b>In-Kind Contribution:</b>	<b>50% of Total ETP Funding Required</b>	<b>Inherent</b>
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**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 Apprentice	Comm'l. Skills, Computer Skills, OSHA 10/30	84	8-210	0	\$3,032	\$22.77
				Weighted Avg: 135			
2	Priority Journeymen	Comm'l. Skills, Computer Skills, OSHA 10/30	10	8-200	0	\$1,112	\$22.77
				Weighted Avg: 40			
3	Retrainee Apprentice Veteran	Comm'l. Skills, Computer Skills, OSHA 10/30	5	8-210	0	\$3,032	\$22.77
				Weighted Avg: 135			
4	Priority Pre-Apprentice	Comm'l. Skills, Computer Skills, OSHA 10	20	8-200	0	\$943	\$22.77
				Weighted Avg: 42			

**Minimum Wage by County:** SET/Priority Industry: \$22.77 per hour

**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 \$4.96 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 and 3; and Up to \$8.07 per hour may be used to meet the Post-Retention Wage for Job Number 4.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Apprentice Sheet Metal Worker		42
Apprentice Sheet Metal Service Technician		22
Apprentice Sheet Metal and TAB Technician		20
<b>Job Number 2</b>		
Journeyman Sheet Metal Worker		5
Journeyman Sheet Metal Service Technician		3
Journeyman Sheet Metal and TAB Technician		2
<b>Job Number 3</b>		
Veteran Apprentice Sheet Metal Worker		3
Veteran Apprentice Sheet Metal Service Technician		1
Veteran Apprentice Sheet Metal and TAB Technician		1
<b>Job Number 4</b>		
Pre-Apprentice Sheet Metal Worker		11

Pre-Apprentice Sheet Metal Service Technician		6
Pre-Apprentice Sheet Metal and TAB Technician		3

## **INTRODUCTION**

Founded in 1941 and headquartered in Sacramento, Northern California Valley Sheet Metal Industry Joint Apprenticeship and Training Committee (NorCal Sheet Metal JATC)([www.sheetmetaltraining.com](http://www.sheetmetaltraining.com)) provides training for Apprentices, Pre-Apprentices and Journeymen in the sheet metal, HVAC, and testing and air balance (TAB) industries. Trainees are represented under collective bargaining between representatives from Local 104. The NorCal Sheet Metal JATC delivers training to 21 counties across Northern California. Training under this proposal will be for Apprentices, Pre-Apprentices and Journeymen.

Apprentices in this trade are trained in fabrication, design, installation of ductwork and equipment, service and repair of all types of heating, air-conditioning, and refrigeration equipment. Trainees are also offered welding certification in all areas. Training will consist of hands-on instruction and lecture.

This is NorCal Sheet Metal JATC third ETP Agreement, and the third in the last five years. Training under the prior Agreement was focused on Apprentice training. Training under the proposed agreement will include Journeymen and Pre-Apprentice training.

### **Veterans Program**

NorCal Sheet Metal JATC actively recruits and has a hiring preference for Veterans. The Veteran training curriculum will be the same as Apprentice training outlined above. The NorCal Sheet Metal JATC is part of the National Helmets to Hard Hats initiative. All Veterans referrals from National Helmets to Hard Hats are automatically moved to the top of their Qualified Applicants list. The NorCal Sheet Metal JATC also attends job fairs specifically targeting Veterans.

## **PROJECT DETAILS**

ETP funding will allow employers to manage the growing volume of work in Northern California by providing workers with skills to meet demand and industry changes.

New construction requiring sheet metal fabrication and demand for long-term servicing of industrial HVAC systems continues to grow. Training will ensure employers can meet the demands of their customers. Sample construction projects in Northern California where NorCal Sheet Metal JATC trainees are working or will be working during the Agreement term includes: The O Street Hi-Riser Project in Sacramento, The Flying Cloud in Lone, the Cache Creek Casino and the Elk Grove Casino.

The JATC will also ensure trainees are certified with the necessary agencies once training is complete. Service Technician trainees will receive an Environmental Protection Agency certification in HVAC servicing and installation. Trainees will also receive certification in Forklift operation and Journeymen will become certified with American River College verifying their State & National Journeymen status.

### **Apprenticeship Program**

The Panel funds 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 supplements cost of delivery for the Related and Supplemental

Instruction (RSI) portion of DAS-approved apprenticeship training. Apprenticeship programs vary in length. In this project the program is five years.

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 \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

## Training Plan

**Commercial Skills:** Training will be offered to Apprentices, Journeymen and Pre-Apprentices to ensure trainees have the skills and knowledge to be successful in sheet metal fabrication. Training topics include Advanced Triangulation, Layout and Fabrication of Complex Fittings, Study of Psychometrics, Electricity and HVAC Systems, Architectural Sheet Metal and Duct Leakage Testing.

**Computer Skills:** Training will be offered to Apprentices, Journeymen and Pre-Apprentices. Training will provide apprentices with computer skills that are essential to their job duties. Training topics include Building Information Modeling, DCC Logic Programing, Introduction to Computerized Building Management and Computerized-Aided Drafting Training.

## Certified Safety Training

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. 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.

## Commitment to 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

The Apprenticeship Director and Administrative Assistant will administer the ETP project. A Training Coordinator will schedule training. Seven internal trainers will provide all training. The Apprenticeship Director will report project performance to the governing board on a monthly basis.

## Trainer Qualifications and Training Coordinator

All trainers are in-house experts and receive instructor training through international training organizations and are approved by American River College. NorCal Sheet Metal JATC has seven



staff members facilitating the project and two staff members dedicated to marketing, recruitment, needs assessments and scheduling training.

### **Impact/Outcome**

Certification for Apprentice training include OSHA10/30, Forklift: Warehouse, Rough Terrain Operation and Aerial, EPA Section 608 Certification Section I and II, and State and National Journeyman statuses and certification from American River Community College.

### **Marketing and Support Costs**

Marketing is done through NorCal Sheet Metal JATC's website, direct mailings, brochures/flyers, personal contacts, telephone calls, public service announcements and e-mail announcements. All of NorCal Sheet Metal JATC's current participating employers are signatory to Local 104. The Norcal Sheet Metal JATC also promotes this training program at labor-management meetings and industry assemblies.

NorCal Sheet Metal JATC is requesting 8% support costs to assist staff in training liaison with qualifying signatory employers. Recruitment and assessment activities for Apprentices will also be supported. Staff recommends 8% support costs.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **ACTIVE PROJECTS**

The following table summarizes NorCal Sheet Metal JATC's performance under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
*ET17-0927	\$266,880	03/01/17 – 02/28/19	118	24	24

\*Based on ETP Systems to date, 17,896 reimbursable hours have been tracked for potential earnings of \$251,259 (94% of the approved amount). The Contractor projects final earnings of 94%.

### **PRIOR PROJECTS**

The following table summarizes Contractor's performance by NorCal Sheet Metal JATC under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET13-0917	Northern California	12/31/12 – 12/30/14	\$149,870	\$149,840 (100%)

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

N/A

**Exhibit B: Menu Curriculum****Class/Lab Hours**

8-210 (Jobs 1 &amp; 3)

8-200 (Jobs 2 &amp; 4)

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- Advanced Blueprint Reading
- Advanced Drafting Skills
  - Isometric
  - Oblique
  - Perspectives
- Advanced Triangulation, Layout and Fabrication of Complex Fittings
- Air and Its Properties
- Air and Water Cooled Condensers
- Architectural Sheet Metal
- Basic Electrical Theory and Fundamentals
- Bio Cabinet Safety/Testing
- Building HVAC Control Theory and Application
- Building Pressurization Analysis
- Calculating Equipment Cooling Capacities and Enthalpy of Air
- Calculating System Design and Operation
  - Design
  - Fabricate
  - Test Lab Duct Systems
- Central HVAC System Design
- Chilled Water Systems
- Complete Building Takeoff for Sheet Metal
- Confined Space Training
- Constant Volume Air Conditioning
- Control System Fundamentals
- DCC Controls and Systems
- Demand Control Ventilation
- Design, Fabrication and Installation of Duct Systems
- Duct Design and Airflow Calculations
- Duct Elevation Drawings
- Duct Leakage Testing
- Electric/Electronic Control Systems
- Electric Motors and Controls
- Electrical Components
- Electrical Panel Safety
- Electricity and HVAC Systems
- Energy Audit
- Environmental Building Science
- Exhaust Hood and System Fabrication and Installation
- Field Measuring
- Fire Life Safety
- Fire and Smoke Dampers
- Food Service Stainless Fabrication and Sanitary Code Requirements
- Forman's Problems (Troubleshooting)
- Fume Hood Testing Fundamentals

- Gas Heating Systems
- GREEN/LEED Awareness
- Heat Load Calculations
- Heat Pump Components and Operation
- High and Low Voltage Applications
- Hoisting and Rigging
- HVAC Blueprint Takeoff for Bidding
- HVAC Detail Drawings
- HVAC Fan Laws and Principles
- Indoor Air Quality Procedures
- Industrial Specifications and Details
- Installation of Prefabricated Building Panels and Architectural Elements
- Introduction to Commercial Refrigeration
- Introduction to HVAC Equipment
- Layout and Fabrication of Fittings Using Drafting Skills
- LEAN Construction
- Local Codes and Standards
- Manometer, Pitot Tube and Tachometer Usage
- Multi Zone HVAC
- OSHA Regulations
- Pneumatic Controls Systems
- Positive/Negative Pressure Blow Pipe Construction
- Refrigerant Safety
- Refrigerant Control Devices and Troubleshooting
- Rooftop Architectural Steel
- Rooftop Steel Construction
- SMACNA Standards for Duct Construction
- SMACNA TABB Procedural Guide
- Sound and Vibration Principles/Testing
- Standing Seam Roofs
- Study of Psychometrics
- TABB Supervisor Training
- TABB Technician Certification
- Testing, Adjusting and Balancing System
- Trigonometry For the Sheet Metal Industry
- Troubleshooting HVAC Equipment
- Understanding Blueprints and Job Specifications
- Variable Air Volume Systems
- Welding Safety
- Welding Skills (Mig, Trig, ARC)
- Wiring Circuits and Schematics
- Zone Control Systems

#### **COMPUTER SKILLS**

- BIM (Building Information Modeling)
- CAD Training
- DCC Logic Programing
- Introduction to Computerized Building Management

**OSHA 10/30** (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

Safety Training cannot exceed 10% of total training hours per-trainee (This cap does not apply to OSHA 10/30)

Note: Job Numbers 1 and 3: Reimbursement for retraining is capped at 210 total training hours per trainee, regardless of the method of delivery. Job Numbers 2 and 4: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.



**Retrainee – Job Creation  
Training Proposal for:  
Auto Work Body & Paint, Inc. dba  
Fix Auto Downtown El Monte**

**Small Business**

**ET19-0314**

**Approval Date:** November 1, 2018

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

**CONTRACTOR**

- Type of Industry: Services  
Priority Industry:  Yes  No
- Number of Full-Time Employees  
California: 23  
Worldwide: 23  
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: 7%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$18,226
- In-Kind Contribution: \$21,250

**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	Business Skills, Commerical Skills, Computer Skills, Cont. Improv., HazMat, PL-Commerical Skills	14	8-60	0	\$884	\$30.36
				Weighted Avg: 34			
2	New Hire SB <100 Job Creation Initiative SET	Business Skills, Commerical Skills, Computer Skills, Cont. Improv., HazMat, PL-Commerical Skills	5	8-60	0	\$1,170	* \$14.62
				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 regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

- Reimbursement Rate: Job #'s 1 & 2: \$26 Small Business Rate
- County(ies): Los Angeles
- Occupations to be Trained: Admin/Support Staff, Repair Planners, Production/Parts, Technicians, Manager, Owner
- Union Representation:  Yes  
 No
- Health Benefits: Job #1: \$2.11 per hour Job #2: \$2.50 per hour

**SUBCONTRACTORS**

- Development Services: Synergy Management Consultants of Grass Valley, assisted with development for a flat fee of \$1,500
- Administrative Services: Synergy Management Consultants will also provide administrative services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

## **OVERVIEW**

Founded in 2010 and headquartered in El Monte, Auto Work Body & Paint, Inc. dba Fix Auto Downtown El Monte (Fix Auto), [www.fixauto.com/elmonte](http://www.fixauto.com/elmonte) is an automotive collision repair shop. Customers included insurers and automobile fleet companies.

### **Training Plan**

Over the past two years, Fix Auto experienced a significant scheduling backlog due to a significant increase in customer demand. Additionally, the Company implemented a new proprietary electronic repair tracking system, improvements to repair processes, production and the overall customer experience. Staff require training on this new system as the new enhancement and features will better equip staff with the tools to create more efficient and timely repairs. Fix Auto must train staff to stay current with changes in vehicle manufacturing, structural materials and on-board computer/smart systems.

In addition, industry specific training in Collision Repair and Automotive Service quality training are required by insurance companies to remain competitive. Manufacturer training for Ford, General Motors Honda/Acura and Toyota are also required. Sales, customer engagement and service training will enable a higher level of customer satisfaction, along with a higher percentage of captured jobs. Continuous improvement training is needed for all employees to become skilled at Lean, Root Cause Analysis and team production concepts.

Training will be delivered via Class/lab and Productive Lab (PL) training in the following:

**Business Skills:** Training will be offered to all occupations to increase customer service and sales skills. Training will enable better communication and conflict resolution skills. Business Skills training will be related to job specific functions.

**Commercial Skills:** Training will be offered to Technicians, Production/Parts Staff, Repair Planners and Managers to upgrade skills for new technology vehicles and increase safety.

**Computer Skills:** Training will be offered to all occupations to allow the Company to use IT systems to track costs; plan production and service flow while communicating with new and existing customers and employees, reducing waste and maximizing efficiency and productivity.

**Continuous Improvement:** Training will be offered to all occupations to improve product quality, cycle time, and cost efficiency by implementing Lean Quality and Production Improvement systems.

**Hazardous Materials:** Training will be offered to Repair Planners, Technicians and Managers. Training will include handling and disposing of hazardous materials, regulatory documentation, and chain of custody processes.

### **Productive Laboratory (PL) -Commercial Skills**

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

Fix Auto will provided approximately 24 hours of PL training to 14 Technicians and Production/Parts Staff on production equipment such as resistance spot welders, spray guns, spray booths and various hand tools. PL training is necessary to ensure safety and production standards are being met. Training will be conducted by in-house subject-matter experts. Topics



will include Collision Repair and Painting, Body Plastic Repair and Welding. PL training will be conducted at a 1:1 trainer-to-trainee ratio.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly hired employees will be subject to a lower post-retention wage.

Fix Auto is expanding business capacity. The Company will hire an additional four Technicians and one Repair Planner (Job Number 2). The Company's expansion is necessary to meet customer demands on quality service on their vehicles. The Company has also invested in new welding equipment and repair tooling to help keep pace with customer demand. The date-of-hire for 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 Infrastructure**

Fix Auto has a detailed training plan in-place and is ready to begin training upon approval. The Company owner and main manager will be responsible for overseeing all training efforts. Fix Auto has also retained Synergy Management Consultants to assist with ETP administration. Training will be delivered by in-house experts and vendors as needed.

### **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 Retention
- Customer Engagement
- Customer Relationship Building
- Closing sales
- DRP management
- Advanced Closing Techniques
- Sales Procedures & Strategies
- Negotiation Skills
- Conflict Resolution
- Communication Skills
- Presentation Skills

**COMMERCIAL SKILLS**

- Surface Preparation
- Vehicle Priming/Sealing
- Paint Spray Guns Maintenance & Set-up
- Corrosion Protection Process
- Sand, Buff & Detail
- Color Theory & Tints
- Blending Techniques
- New Technologies
- Trim & Hardware
- I-CAR Collision Repair Certification Skills
- Unibody Alignment
- Three dimensional measuring
- Repair & replacement of Outer Body Panels
- High Strength Steels
- Aluminum Repair Processes
- MIG Welding
- Aluminum Welding
- 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
- Composite materials and bonding techniques
- Remove & Install Trim & Hardware
- Adhesive Bonding
- Diagnose Wind Noise & Water Leaks
- Aluminum Cosmetic Damage
- Spot Welding
- Composite repair
- Estimating Skills

- Steering & Suspension System Damage Analysis
- Damage on non-drivable vehicles
- Electrical/Mechanical Systems
- Stationary glass
- Advanced Materials
- Advanced Vehicle Systems
- BluePrint, supplemental damage assessment
- Vehicle Operation, Maintenance, & Troubleshooting
- Alternative Fuel & Hybrid Vehicle Repair Diagnostics
- Service Procedures & Scheduling
- Product Knowledge
- OEM (Original Equipment Manufacturer) Knowledge/Skills
- Pre-Post Scanning/ computer recalibration

### **COMPUTER SKILLS**

- Job Costing
- Production Flow
- Production Planning - ETA Times & Dates
- Internal & External Customer Communication
- Parts check in and posting
- Mitchell & Mitchell Repair Center Software
- CCC Info Systems Software
- Alldata Software
- Microsoft Office Suite- Intermediate and Advanced
- Quickbooks

### **CONTINUOUS IMPROVEMENT**

- Leadership Skills
- Teambuilding
- Root Cause Analysis
- Lean Concepts
- Process/Quality Improvement
- Problem Solving/Decision Making Skills
- Inventory Control
- Standard Operating Procedures
- Process design

### **HAZARDOUS MATERIALS HANDLING**

- Completing Material Safety Data Sheets (MSDS)
- Volatile Organic Compound (VOC) Tracking
- Emergency Clean-up
- Registration, Evaluation of Chemical Substances

### **PL Hours**

0-24

### **PRODUCTIVE LAB (PL) (limited ratio 1:1)**

### **COMMERCIAL SKILLS**

- Body Filler Methods
- Plastic Repair Methods
- Mig Welding
- Mig Brazing Techniques
- Resistance Spot Welding Techniques
- Color Tinting

- Spray/Blending Techniques
- Measuring Vehicle Structure
- Alignment Process for Unitized Vehicles
- Alignment Process for Full Frame Vehicles
- Aluminum Repairs
- Technical Estimating Skills
- Estimating ERP
- Estimating System Software Skills

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.



Delegation Order

Retrainee – Job Creation  
Training Proposal for:  
Electrode Technologies, Inc. dba Reid Metal Finishing

**Delegation < \$75,000 Single Employer**

**ET19-0318**

Approval Date: November 1, 2018

ETP Regional Office: San Diego

Analyst: C. Clady

**CONTRACTOR** www.rmfusa.com

- Type of Industry: Services (G)  
Manufacturing (33)  
Priority Industry:  Yes  No
- Number of Full-Time Employees  **Small Business**  
California: 77  
Worldwide: 77  
Number to be trained: 82  
Small Business Only:  
Owner  Yes  No
- Out-of-State Competition:  Yes  No
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 3%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$74,568
- In-Kind Contribution: \$95,500

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	ETP Required Wage*
				Class / Lab	CBT		
1	Priority SB<100	Mfg. Skills, Computer Skills, Business Skills, Cont. Imp., PL-Mfg. Skills	77	8-200	0	\$884	\$17.50
				Weighted Avg: 34			
2	Priority SB<100 Job Creation	Mfg. Skills, Computer Skills, Business Skills, Cont. Imp., PL-Mfg Skills	5	8-200	0	\$1,300	*\$14.58
				Weighted Avg: 50			

\* It will be made a condition of contract that the trainees will never be paid less than the statewide or local minimum wage rate in effect at the end of retention regardless of wage expressed in this table & Contract.

- Reimbursement Rate: Job #'s 1 & 2: \$26 Priority/Program Initiatives
- County(ies): Orange
- Occupations to be Trained: Production staff, Administration Staff, Supervisor/ Manager, Owner
- Union Representation for Trainees:  Yes  No
- Health Benefits: (Employer Paid to Meet ETP Wage)  No  Yes  
Up to \$2.50/hour may be included to meet ETP Required Wage for Job Numbers 1 & 2.

**OVERVIEW**

<b>Year Company Founded:</b>	1978	<b>Company Headquarters:</b> <input checked="" type="checkbox"/> Single location Santa Ana
<b>Facility location(s) where training will occur</b>		Santa Ana (Orange County)

<b>Nature of Business</b>	Electrode Technologies, Inc. (ETI) is a plating, anodizing and non-destructive testing company. ETI provides custom application of specialty coatings to improve appearance and give special characteristic such as anti-stick, chemical and corrosion resistance, durability and heat resistance for a variety of parts.
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<b>Customer Base</b>	Aircraft, aerospace, chemical, medical and military industries
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<b>Business / Industry Needs / Changes</b>	<p>Due to demands from the Company's military, government and aerospace customers, ETI must be in accordance with AS 9100 and ISO 9001. AS 9001 is international management system standard for the Aircraft industry. It is based on the ISO 9001 quality system requirements.</p> <p>ISO 9001 is the international standard that specifies requirements for a quality management system. Organizations use the standard to demonstrate the ability to consistently provide products and services that meet customer and regulatory requirements</p> <p>ETI projects 15% increase in work in the next 12 months. Therefore, the Company will hire five new workers to its existing staff.</p>
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### Training Plan:

<b>Need for Training:</b>	<p>Staff will be trained in Manufacturing, Computer and Continuous Improvement Skills to become more efficient and productive.</p> <p>Furthermore, Production Staff will receive training required to implement AS 9100 and ISO 9001 certification important for processes and procedures to satisfy Department of Defense, NASA, and Federal Aviation Administration.</p> <p>Supervisors will participate in training to improve their ability to manage and work well with their teams to implement necessary business changes.</p> <p>Employees must be trained and knowledgeable on Metal Plating, Testing and Anodizing. In addition, highly skilled production and management positions must complete extensive training programs.</p> <p>ETP training will enable ETI to provide AS 9100 certification and other process training such as Lean and Six Sigma training to trainees.</p>
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Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- Class/lab     
  E-Learning     
  CBT     
  Productive Lab

Business Skills	Manufacturing Skills	Computer Skills
Continuous Improvement		

<b>Productive Laboratory</b>	<b>Justification:</b> <input checked="" type="checkbox"/> New Production Procedures <input type="checkbox"/> Certification Standards
	<b>24 PL Hours per-trainee</b>
	<b>Occupations Receiving PL Training:</b> Production Staff will receive productive lab training.

The PL instructor must be dedicated to training, at a ratio of 1:1.

<b>Job Creation Justification</b>	<input checked="" type="checkbox"/> Expanding existing business capacity by adding newly-hired employees to an existing function
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**Modifications from Standard**

<input checked="" type="checkbox"/> Weighted Average Hours over 45	50 Hours for Job Creation trainees (Job Number 2)
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Modification(s) fall within Panel guidelines whereas, the company training plan is complex, therefore, newly hired its employees need more extensive training in AS9100 and ISO 9001 certification.

<b>Training Infrastructure &amp; Administrative Plan</b>	<ul style="list-style-type: none"> <li>• <b>Coordination of Training (Oversight):</b> The Human Resource Manager will oversee all administration and implementation (coordinating &amp; scheduling) of training.</li> <li>• <b>Trainers:</b> In-house experts will conduct training to include Supervisors/Managers, and leads.</li> <li>• <b>Administrative Duties:</b> ETI has retained an administrative subcontractor to assist with administrative duties.</li> </ul>
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**RECOMMENDATION**

Staff recommends approval of this proposal and modifications



**SUBCONTRACTORS**

<b>Subcontractor Type</b>	<b>Subcontractor Name</b>	<b>City</b>	<b>Cost / %</b>
• Development	Training Funding Source	Seal Beach	\$4,900
• Administrative	Training Funding Source	Seal Beach	13% payment earned
• Training Vendors	To Be Determined	N/A	N/A

**Exhibit B: Menu Curriculum****Class/Lab Hours**

8 – 200

Trainees may receive any of the following:

**MANUFACTURING SKILLS**

- Anodizing
- Bead Blasting
- Equipment Operations
- Good Manufacturing Practices
- Masking
- Material Requirements Planning
- Nondestructive Testing
- Passivation
- Plating
- Pre and Post-Bake
- Warehouse Processes
- Hazardous Material
- Water Immersion Testing

**COMPUTER SKILLS**

- Enterprise Resource Planning
- Financial Accounting System - Sage
- Manufacturing Resource planning
- Microsoft Office
- MS Project
- Outlook

**CONTINUOUS IMPROVEMENT**

- AS9100 Quality Management System
- Federal Aviation Administration, National Aeronautics and Space Administration, Department of Defense Standards
- National Aerospace and Defense Contractors Accreditation Program
- Process Improvement
- Productivity Improvement
- Quality improvement
- Six Sigma
- Statistical Process Control
- Teambuilding

**BUSINESS SKILLS**

- Coaching
- Customer Service
- Goal Setting
- Inventory Control
- Interpersonal Communication
- Leadership
- Negotiation
- Planning

- Procurement
- Product Knowledge
- Project Management
- Time Management

**PL Hours**

0 – 24

**MANUFACTURING SKILLS** (Ratio 1:1)

- Anodizing
- Bead Blasting
- Equipment Operations
- Good Manufacturing Practices
- Hazardous Material Handling
- Inspection
- Masking
- Material Requirements Planning
- Nondestructive Testing
- Passivation
- Plating
- Pre and Post-Bake
- Racking
- Air Quality standards
- Storm Water
- Warehouse Processes
- Waste Water Treatment
- Water Immersion Testing

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



**Training Proposal for:  
Haliburton International Foods, Inc.**

**Delegation  $\leq$  \$75,000 Single Employer**

**ET19-0309**

**Approval Date:** October 18, 2018

**ETP Regional Office:** San Diego

**Analyst:** H. Bernard

**CONTRACTOR**     [www.haliburton.net](http://www.haliburton.net)

- Type of Industry: Manufacturing & Food Processing (E)  
Priority Industry:  Yes  No
  
- Number of Full-Time Employees
  - California: 194
  - Worldwide: 194
  - Number to be trained: 136
  
- Out-of-State Competition:  Yes  No
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
  
- Turnover Rate: 14%
- Repeat Contractor:  Yes  NO

**FUNDING**

- Requested Amount: \$70,720
- In-Kind Contribution: \$83,952

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	ETP Required Wage*
				Class / Lab	CBT		
1	Priority Initiative Retraining	Business Skills Computer Skills Cont. Improv. Mfg.f Skills PL – Mfg. Skills	125	8-200	0	\$520	\$16.70
				Weighted Avg: 20			
2	Priority Initiative Retraining Job Creation Initiatives	Business Skills Computer Skills Cont. Improv. Mfg. Skills PL – Mfg. Skills	11	8 - 200	0	\$520	*\$13.66
				Weighted Avg: 20			

\*It will be made a condition of contract that the trainees will never be paid less than the statewide or local minimum wage rate in effect at the end of retention regardless of wage expressed in this table & Contract.

- Reimbursement Rate:
  - Job #1: \$26 Priority/Program Initiatives
  - Job #2: \$26 Priority/Program Initiatives – Job Creation
- County(ies): San Bernardino
- Occupations to be Trained: Production Staff, Warehouse Staff, Quality Staff, Maintenance Staff, Facilities Staff, Sanitation Staff, Supervisors/Managers, Administrative Staff
- Union Representation for Trainees:  Yes  No
- Health Benefits: (Employer Paid to Meet ETP Wage)  No  Yes  
Up to \$2.50 /hour may be included to meet ETP Required Wage for Job#(s) 1 & 2.

**OVERVIEW**

<b>Year Company Founded:</b>	1992	<b>Company Headquarters:</b> <input checked="" type="checkbox"/> Single location, Ontario, CA
<b>Facility location(s) where training will occur</b>	Ontario (San Bernardino County)	
<b>Nature of Business</b>	Haliburton International Foods, Inc. (Haliburton) manufactures food products such as roasted vegetable blends, salsas, purees, pastes, dips, marinades, spreads, hummus and soups.	
<b>Customer Base:</b>	National restaurant chains and large retailers	

<b>Business / Industry Needs / Changes</b>	<p>Haliburton implemented a new ERP system in July 2018 at a cost of approximately \$200,000. The Company also recently entered into contract negotiations with new and existing customers. These contracts will be for additional output on Haliburton’s existing production lines and adds new products to it’s sauce line. This increase in business will require an additional 16-20 hours of daily production, affecting 40% of the manufacturing plant. As a result of the increased demand, the Company will be implementing a second production shift. Haliburton has purchased the following new equipment and is in process of implementing these new systems:</p> <ul style="list-style-type: none"> <li>a) Three Sormac Onion Peelers, which are utilized on the production floor to peel onions (\$300,000).</li> <li>b) SFW Hydro Cutter Maching which cuts fruits and vegetables (\$90,000).</li> <li>c) Reverse Osmosis System which will asassist with processing wastewater and water recycling (\$45,000).</li> </ul>
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**Training Plan:**

<b>Need for Training:</b>	<p>To keep up with technology/software changes and support increased customer and production demands, Haliburton must provide training in the following areas:</p> <ul style="list-style-type: none"> <li>• Computer Skills training to newly hired staff on the new ERP system as well as provide training for incumbent staff on additional modules to the system that may be added in the coming months.</li> <li>• Manufacturing Skills training to new and existing staff on new products and production lines as the Company expands its manufacturing line. In addition, extensive training will be provided to Production Staff on newly acquired equipment.</li> </ul> <p>Haliburton will also provide ongoing training in Lean Manufacaturing, Communication Skills, Customer Relations, Product Knowledge, Good Manufacturing Processes and many others by occupation and need.</p>
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Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- Class/lab     
  E-Learning     
  CBT     
  Productive Lab

<b>Business Skills</b>	<b>Computer Skills</b>	<b>Manufacturing Skills</b>
<b>Continuous Improvement</b>		

<b>Productive Laboratory</b>	<p><b>Justification:</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> New Equipment</li> <li><input checked="" type="checkbox"/> New Production Procedures</li> <li><input type="checkbox"/> Certification Standards</li> </ul>
	<p><b>0-60 PL Hours per-trainee</b></p>
	<p><b>Occupations Receiving PL Training:</b>                  Production Staff, Warehouse Staff, Maintenance Staff, Facilities Staff and Quality Staff</p>

The PL instructor must be dedicated to training, at a ratio of 1:1.	
<b>Ratio Higher than 1:1</b>	1:2 - Occasionally, staff will work in groups of two on certain pieces of machinery as such, need to be trained in pairs.

<b>Job Creation Justification</b>	<input checked="" type="checkbox"/> Expanding existing business capacity by adding newly-hired employees to an existing function; or,  <input checked="" type="checkbox"/> Expanding existing business capacity by adding a new production shift;  <input type="checkbox"/> Opening specific new plants or facilities, expanding or upgrading existing facilities, and/or repurposing existing unused space/buildings or facilities;  <input type="checkbox"/> The recall or rehire of laid-off workers (backfilling) is allowed, with justification to show that the company is renewing a workforce that was reduced due to economic conditions or other reasons leading to attrition
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### Temp-to-Perm

Average days to convert temporary workers to full time permanent employment.	90 days
Employer-paid healthcare premiums while on temporary status.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

<b><i>Training Infrastructure &amp; Administrative Plan</i></b>	<ul style="list-style-type: none"> <li>• <b>Coordination of Training (Oversight):</b> This project will be overseen by the Executive Vice President and implemented by the Human Resources Team which includes an HR Manager and an HR Generalist who will work internally to schedule and track training.</li> <li>• <b>Trainers:</b> Training will be provided primarily by in-house trainers, however Haliburton may utilize vendors as necessary.</li> <li>• <b>Administrative Duties:</b> The project administration will be managed by the HR Manager with assistance by the HR Generalist. In addition, these staff members will work with the Payroll and Benefits Specialist to ensure compliance with ETP's performance metrics.</li> </ul>
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### RECOMMENDATION

Staff recommends approval of this proposal and modifications

### SUBCONTRACTOR

N/A

**Exhibit B: Menu Curriculum****Class/Lab Hours**

8 – 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Documentation Practices and Documentation Control
- Internal Auditing
- Coaching
- Communication Skills
- Project Management
- Problem solving/Root Cause Analysis
- Product Knowledge
- Customer Relations

**COMPUTER SKILLS**

- ERP System
- Microsoft Office (Intermediate Only)
- Computer Assisted Machinery

**CONTINUOUS IMPROVEMENT**

- Leadership Skills
- LEAN Manufacturing
- 5S
- Standard Operating Procedures
- Process Improvements

**MANUFACTURING SKILLS**

- **Manufacturing Process**
  - ERP System
  - Inventory
  - Operations
  - Distribution
  - Shipping/Receiving
  - Picking
  - Packing
- **Manufacturing equipment training**
  - Grinding machines
  - Packing machines
  - Sealing machines
  - Ovens
  - Kettles
  - Food processors
  - Metal detector
  - Palletizing machines
  - Forklift machinery
  - Sanitation equipment
  - Other production equipment
- **Maintenance**
  - Electrical
  - Mechanical



- Facilities
- **Quality/Food Safety**
  - Allergens
  - GMP's
  - Foodborne Illness
  - Bloodborne Pathogens
  - Dangerous Microorganisms
  - Effective Pest Control Practices
  - Basic Food Facility Defense
  - Preventing Food Contamination
  - Food Safety Standards and SQF
  - Introduction to FSMA
  - Overview of HACCP
  - Preventative Controls
  - Environmental Monitoring
  - Promoting Personal Hygiene
  - Testing
  - Inspection
  - Lab Equipment
- **Safety**
  - Ammonia Awareness

### **Productive Lab Hours**

0 – 60

#### **PRODUCTIVE LAB (PL) (limited ratio 1:2)**

- **Manufacturing Skills**
  - Processing
  - Weight Scales
  - Sanitation Procedures
  - Palletizing
  - Lock Out/Tag Out Training
  - Metal Detectors
  - Machinery Operation

Safety Training cannot exceed 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.
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**Retrainee - Job Creation  
Training Proposal for:**

**LASAR Inc. dba Lake Aero Styling and Repair**

**Small Business**

**ET19-0316**

**Approval Date:** November 5, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Mam

**CONTRACTOR**

- Type of Industry: Transportation/Communication (I)  
Transportation Warehousing (48-49)  
Manufacturing  
Priority Industry:  Yes  No
- Number of Full-Time Employees  
California: 18  
Worldwide: 18  
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: 0%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$23,920
- In-Kind Contribution: \$13,736

**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, Commercial Skills, Computer Skills, Cont. Imprv., HazMat, Mgmt Skills, Mfg. Skills, PL - Comm Skills, PL - Mfg. Skills	13	8-60	0-8	\$1,040	\$16.70
				Weighted Avg: 40			
2	Retrainee Priority Rate Job Creation Initiative SB <100	Business Skills, Commercial Skills, Computer Skills, Cont. Imprv., HazMat, Mfg. Skills, PL - Comm Skills, PL - Mfg. Skills	5	8-60	0-8	\$1,040	*\$13.66
				Weighted Avg: 40			
3	Retrainee Priority Rate Veterans SB <100	Business Skills, Commercial Skills, Computer Skills, Cont. Imprv., HazMat, Mgmt Skills, Mfg. Skills, PL – Comm, PL - Mfg. Skills	5	8-60	0-8	\$1,040	\$16.70
				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 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 Small Business Rate
- County(ies): Lake County
- Occupations to be Trained: Technician, Mechanic, Administrative Staff, Parts/Shipping Staff, Manager
- 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 1975 and headquartered in Lakeport, LASAR Inc. dba Lake Aero Styling and Repair (LASAR) ([www.lasar.com](http://www.lasar.com)) is a full-service aircraft maintenance and repair shop. The Company also manufactures and install parts and supplies such as speed modifications for small aircrafts. The Company provides in-house services for local aviation businesses and aircraft owners and online ordering for aircraft parts worldwide. The Company has only one facility, located in Lakeport. This is LASAR's first ETP Agreement.

### **Veterans**

The Panel has established a higher reimbursement rate and other incentives for training California veterans. This project includes training for Veteran employees.

### **Need for Training**

The aviation industry is evolving, necessitating employees be trained to meet current Federal Aviation Administration (FAA) regulations. One change is a requirement to update navigation/tracking systems to Automatic Dependent Surveillance – Broadcast (ADS-B) systems. Training under this proposal will ensure staff are trained on proper maintenance and installation.

Also, new aircraft are released from production annually with updates requiring ongoing training for mechanics and parts personnel. LASAR primarily services Mooney aircrafts and will be expanding to include a wider variety of small aircraft models. Staff must be trained on the different aircrafts to ensure proper maintenance and repairs.

The Company also manufactures customized speed modifications kits which enhances performance and functionality of aircrafts. Staff must be trained on customizing kits tailored to customer orders.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

LASAR will be expanding business capacity by hiring new employees due to an increase in service upgrades for ADS-B systems. LASAR will hire five full-time employees including Technicians, Mechanics, Administrative Staff, and Managers. Staff will need to be trained on installation and ongoing maintenance and repairs. The date-of-hire for 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 be delivered via Classroom/Laboratory, Productive Lab (PL) and Computer-Based Training (CBT) methods. In-house subject matter experts and, if necessary, vendors may be utilized to deliver training in the following:

**Business Skills** Training will be offered to all occupations. Training will focus on increasing business performance and product knowledge. Training topics include Business Performance, Inventory Control, and Product Knowledge.

**Commercial Skills** Training will be offered to Technicians, Mechanics, Parts/Shipping Staff and Managers. Training will focus on servicing and maintenance of new and existing aircrafts. Training topics include ADS-B Installation, Soldering, and Navigation Operation.

**Computer Skills** Training will be offered to all occupations. Training will focus on system upgrades throughout the Company. Training topics includes EBIS Software and Converge Software.

**Continuous Improvement** Training will be offered to all occupations. Training will focus human factors with new flight deck systems. Training topic include FAA Human Factors.

**Hazardous Materials** Training will be offered to all occupations. Training will focus on material handling and disposal. Training topics include Hazardous Materials Handling and Hazardous Waste Cleaning.

**Management Skills** Training will be offered to Managers. Training will focus on increasing leadership skills. Training topics include Teambuilding and Coaching.

**Manufacturing Skills** Training will be offered to Technicians, Mechanics, and Parts/Shipping Staff. Training will focus on speed modification manufacturing. Training topic include Speed Modification Manufacturing.

### **Productive Laboratory**

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

LASAR is requesting PL-Manufacturing Skills and PL-Commercial Skills training will be provided to Mechanics, Technicians, and Parts/Shipping Staff. PL training will extend technical learning under practical working conditions without creating an excess of waste. Staff will receive hands-on training on proper installation and maintenance of aircraft parts and systems. Equipment to be used includes Band Saw, Drill Press, Heli-Coil Installation, Shrinker & Stretchers, and Aircraft Tug Operation. The Company is requesting 33 hours of PL training with a trainer-to-trainee ratio of 1:3 since some equipment requires teams of three for operations.

Training will be taught by subject-matter experts with demonstrated knowledge and expertise in the field. Instructors will monitor trainee competencies before trainees are deemed competent.

### **Computer-Based Training (CBT)**

CBT will be delivered to supplement class/lab training.

#### ➤ Training Infrastructure

LASAR has the support of their owners and has assigned the Office Manager with the assistance of a support staff to be responsible for overseeing all training and administration. Each department has an assigned manager who will be responsible for scheduling and tracking training. The Company has a detailed training manual to implement with a training schedule and is ready to begin upon approval.

### **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
- + Business Performance
- + Avionics Evaluations
- + Inventory Control
- + Payroll
- + Product Knowledge
- + Project Management
- + Recordkeeping
- + Sales

**COMMERCIAL SKILLS**

- + ADS-B Installation
- + ADS-B Servicing
- + Airframe/Powerplant (A&P) Certification
- + Avionics Training
- + Batch Control
- + FAA Regulations Updates
- + Installation
- + Instrument Flight Rules (IFR) Certification
- + Interactive Voice Response (IVR) Certification
- + Multimeter Use
- + Navigation Operation
- + Pilot Certification
- + PITOT Static Set Operation
- + Soldering
- + Transponder Operation
- + Wiring Practices

**COMPUTER SKILLS**

- + EBIS Software
- + Converge Software
- + Quickbooks
- + Square

**CONTINUOUS IMPROVEMENT**

- + FAA Human Factors

**HAZARDOUS MATERIALS**

- + Hazardous Materials Handling
- + Hazardous Waste Cleaning

**MANAGEMENT SKILLS**

- + Team Building
- + Coaching

**MANUFACTURING SKILLS**

- + Speed Modification Manufacturing

**Productive Lab Hours**

0-33

**COMMERCIAL SKILLS (1:3 trainer-to-trainee ratio)**

- + ADS-B Installation
- + ADS-B Servicing
- + Airframe/Powerplant (A&P) Practical Skills
- + Avionics Training
- + Batch Control
- + Engine Repair
- + Equipment Calibration
- + Equipment Operation
  - o Band Saw
  - o Drill Press
  - o Shrinker/Stretchers
  - o Aircraft Tug
- + General Maintenance
- + Heli-Coil Installation
- + IFR/IVR Certifications
- + Inspector Training
- + Installation
- + Internal Parts Usage
- + Multimeter Use
- + Navigation Operation
- + Parts Training
- + Pilot Certification: Flight Training
- + PITOT Static Set Operation
- + Process Specifications
- + Quarantine Forms
- + Receiving Inspection
- + Receiving Procedures
- + Repair Order Processing
- + Repairman’s Certification
- + Respirator, A&P License
- + Shipping Procedures
- + Soldering
- + Speed Modification Installation
- + Technician Training
- + Transponder Operation
- + Wiring Practices

**MANUFACTURING SKILLS (1:3)**

- + Speed Modification Manufacturing

**CBT Hours**

0-8

**COMMERCIAL SKILLS**

- + Invoice Processing
- + Mooney Airplane Company Online Course
- + Parts Inventory

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:**

**Metal Tite Products dba Krieger Specialty Products**

**Small Business**

**ET19-0304**

**Approval Date:** October 24, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Paccerelli

**CONTRACTOR**

• Type of Industry:

Manufacturing (E)

Priority Industry:  Yes  No

• Number of Full-Time Employees

California: 64

Worldwide: 69

Number to be trained: 24

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:

\$56,056

• In-Kind Contribution:

\$95,392



**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; Continuous Imp.; Mfg. Skills; PL-Mfg. Skills	64	8-60	0	\$832	\$17.54
				Weighted Avg: 32			
2	Retrainee Priority Rate SB <100 Job Creation Initiative	Business Skills; Computer Skills; Continuous Imp.; Mfg. Skills; PL-Mfg. Skills	4	8-60	0	\$702	*\$14.62
				Weighted Avg: 27			

\*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: \$26 Small Business Rate
- County(ies): Los Angeles
- Occupations to be Trained: Production Staff, Supervisor/Manager, Owner, Administrative Staff
- Union Representation:  Yes LA SMART Local 170  
 No
- Health Benefits: Up to \$2.50 per hour

**SUBCONTRACTORS**

- Development Services: Training Funding Source (TFS) in Seal Beach assisted with the development of this project for a flat rate of \$2,900.
- Administrative Services: TSF will also provide administrative services for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 1973, Metal Tite Products dba Krieger Specialty Products (Krieger) is a third generation family-owned manufacturer of custom specialty doors and windows. Krieger's primary product is acoustical doors with applications in concert halls, schools, performing arts centers, offices, and government facilities. The company also manufactures blast and bullet resistant doors for chemical plants, research facilities, embassies and other secure locations.

The Company's corporate office and manufacturing facility is located in Pico Rivera. The Company also has three other sales and order processing locations, one each in Idaho, Michigan and Pennsylvania.

## Need for Training

Krieger is currently facing strong competition from Mexican and Canadian manufacturers who are using more automated processes. The operating systems employed at Krieger are outdated and difficult to maintain as they were designed and developed over two decades ago. While there has been some modernization in the Company, there is little or no integration of systems among processes, resulting in slower order processing and creating opportunities for errors during the hand-off of data from one department to another. Training will focus on continuous improvement. In an effort to change the culture and empower each employee, Krieger has embarked on Lean Six Sigma concepts to improve employees' daily tasks and standardize processes. Furthermore, Krieger will provide training on a new Enterprise Resource Planning (ERP) to increase efficiency.

## Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for Newly-hired employees will be subject to a lower post-retention wage.

Krieger expects growth over the next two years. As a result, the Company is expanding business capacity by adding new workers to existing functions. The Company has committed to hiring four additional employees for Production and Administration Staff (Job Number 2). The date-of-hire for 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

**Business Skills** - Training will be offered to all occupations to develop skills and understanding in strategic management and processes. Coaching and developing for Supervisors and Managers will create better leaders and mentors. Training will also help employees manage process changes, such as the new ERP and Lean standards, to support growth.

**Computer Skills** - Training will be offered to all occupations to fully understand and utilize software tools such as Microsoft Office, Magento, SolidWords and AutoCAD. It is also essential that employees are trained in the use of the current ERP and other databases to prepare them for the migration to the new ERP system. These software systems are critical to understanding workflow in the new ERP and ensuring that production, logistics and financials interact together properly.

**Continuous Improvement** – Training will be offered to all occupations. Training will focus on Lean Process Improvement. Krieger is moving towards increasing efficiencies by eliminating waste and redundancies in workflow and internal processes. Kaizen events training will lean out waste and identify redundancies in current processes. The implementation of 5S (Sort, Set-in-order, Shine, Standardize, Sustain and Safety) will improve the overall efficiency of its business and operation goals.

**Manufacturing Skills** - Training will be offered to Production staff and will include operating and maintaining equipment to increase efficiency of manufacturing operations. Training will also enhance employees' technical skills and ensure their understanding of quality inspections, new manufacturing processes, and problem solving/troubleshooting techniques and tools.

**Productive Laboratory (PL)**

Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training. PL training in this proposal will have a trainer-to-trainee ratio of 1:1.

Due to complexity of the production line, use of shop equipment is the only way to ensure measurable and profitable operations. PL training in Manufacturing Skills will focus on procedures and inspection requirements necessary to improve capacity, capability, products, and systems. Each trainee will perform a variety of tasks and functions.

Trainees will receive up to 24 hours of PL at a 1:1 trainer-to-trainee ratio. PL will be provided to Production Staff consisting of 15 to 20 trainees. PL training will be provided by experts skilled in Good Manufacturing Processes and fully qualified in this specific area of training.

➤ **Training Infrastructure**

Krieger's Controller will oversee the training and internal project administration. Training will be provided by in-house subject-matter experts, mainly Supervisors, Managers and Lead employees with extensive experience in the processes and equipment being used for training. In addition, Krieger has retained an outside administrative consultant to ensure that all training records meet ETP compliance.

**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**

- ✚ Change management
- ✚ Coaching Skills
- ✚ Facilitator Skills
- ✚ Finance/Accounting procedures
- ✚ Interpersonal Communication
- ✚ LEED (Leadership Energy Environmental Design)
- ✚ Leadership
- ✚ Planning Skills
- ✚ Product/Service Knowledge
- ✚ Project/Program Management
- ✚ Sales and Marketing
- ✚ Strategy Deployment Process (X-Matrix)

#### **COMPUTER SKILLS**

- ✚ Computer Aided Design (CAD)/Autodesk
- ✚ Customer Relationship Management (CRM)
- ✚ Engineering Design
- ✚ Enterprise Resource Planning (ERP)
- ✚ Lean Six Sigma
- ✚ Magento
- ✚ Machine Programming
- ✚ Microsoft Office
- ✚ Payroll Processing
- ✚ Project Management
- ✚ Sequel Server
- ✚ Solidworks
- ✚ Vault

#### **CONTINUOUS IMPROVEMENT**

- ✚ 5S
- ✚ Lean Process Improvement/Kaizen
- ✚ Problem Solving/Six Sigma Process Controls
- ✚ Performance/Process/Quality Improvement
- ✚ Teambuilding
- ✚ Value Stream Mapping
- ✚ Work Processes/Procedures

#### **MANUFACTURING SKILLS**

- ✚ Calibration
- ✚ Control Charts
- ✚ Daily Status Package/Operational Strategy Execution
- ✚ Equipment Operation, Maintenance & Troubleshooting
- ✚ Good Manufacturing processes
- ✚ Just in Time

- ✚ Inspection techniques
- ✚ Inspection tool selection and care
- ✚ Kanban
- ✚ Manufacturing Math
- ✚ Quality Assurance equipment
- ✚ Structural Drawings
- ✚ Total Productive Maintenance (TPM)
- ✚ UL Certification

**PL Hours**

0 – 24

**MANUFACTURING SKILLS (limited ratio 1:1)**

- ✚ Good Manufacturing Processes
- ✚ Equipment Operation, Maintenance & Troubleshooting

Safety Training will be limited to 10% of a trainee's total training hours

Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
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9101 East Whittier Blvd., 2<sup>nd</sup> Floor  
Pico Rivera, California 90660-2405

**Phone: 562-695-4066**

**Fax: 562-695-4807**



**Ruben Rico**  
*Business Representative*

**Mario Vega**

*Business Manager/Financial Secretary*



August 23, 2018

To: Employment Training Panel

From: SMART Local Union 170

Subject: ETP training at Krieger Steel Products

Dear Panel Members,

We are aware that employees of Krieger Steel Products will receive training funded through the Employment Training Panel (ETP) and we concur with the proposed training.

We feel that the ETP-funded training will assist employees of Krieger Steel Products to obtain the skill to enable them to remain competitive in the manufacturing industry and improve the job security of their employees.

This letter is to advise you that the SMART Local Union 170 is representing the workers at Krieger Steel Products in support of the Employment Training Panel (ETP) project. We look forward to the success of the training.

If you should have questions or concerns with regard to this letter of support, please contact our SMART Local Union 170 office at (562) 695-4066.

Sincerely,

A handwritten signature in blue ink that reads "Mario Vega".

Mario Vega  
Business Manager



**Training Proposal for:  
Proven Solutions, LLC dba Proven Recruiting**

**Delegation ≤ \$75,000 Single Employer**

**ET19-0310**

**Approval Date:** November 1, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**CONTRACTOR** [www.provenrecruiting.com](http://www.provenrecruiting.com)

- Type of Industry: Services (G)  
Priority Industry:  Yes  No
- Number of Full-Time Employees  **Small Business**
  - California: 50
  - Worldwide: 54
  - Number to be trained: 50Small Business Only:  
Owner  Yes  No
- Out-of-State Competition:  Yes  No
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 6%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$58,500
- In-Kind Contribution: \$82,755

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	ETP Required Wage*
				Class / Lab	CBT		
1	Retrainee SB<100	Business Skills, Comm'l. Skills, Computer Skills	50	8-200	0	\$1,170	\$17.03
				Weighted Avg: 45			

- Reimbursement Rate: \$26 Small Business
- County(ies): Los Angeles, San Diego
- Occupations to be Trained: Recruiting Staff, Sales Staff, Administrative Support, Supervisor/Manager, Owner
- Union Representation for Trainees:  Yes  No
- Health Benefits: (Employer Paid to Meet ETP Wage)  No  Yes  
Up to \$1.54 per hour may be included to meet the ETP Minimum Wage

**OVERVIEW**

<b>Year Company Founded:</b>	2007	<b>Company Headquarters:</b> <input type="checkbox"/> Single location San Diego
<b>Facility Locations Outside CA</b>	New York, Texas	
<b>Total Number of Facility locations in California</b>	2	
<b>Facility location(s) where training will occur</b>	San Diego (headquarters) Los Angeles	

<b>Nature of Business</b>	<p>Proven Solutions, LLC dba Proven Recruiting (Proven Recruiting) is a placement agency that specializes in assisting clients in hiring candidates in Technology, Finance, and Accounting on a direct-hire, temporary-to-permanent and contract basis.</p> <p>The Company also provides full-service recruiting support, from creating and executing a search plan to pre-screening candidates (in person), scheduling interviews and checking references.</p>
<b>Customer Base</b>	The Company provides recruiting and consulting services to clients from start-ups to Fortune 500 companies including Qualcomm, Petco, Sony and CNM Group.



<p><b>Business / Industry Needs / Changes</b></p>	<p>As the economy continues to grow, the demand for labor continues to increase for Proven Solutions’ customers. Resources dedicated to seeking and recruiting qualified candidates in the current economy is forcing businesses to find more cost-effective hiring practices. As a result, more companies are using recruitment agencies to fill critical positions and alleviate the overall cost of in-house recruiting process.</p> <p>To meet increased customer demands, Proven Recruiting will add a new Customer Relationship Management (CRM) System as well as new technologies including integrated testing solutions and artificial intelligence-based sourcing applications. The technological advancement will provide its customers with a streamlined approach to its recruitment processes.</p> <p>Proven Recruiting also plans to hire six new employees by the end of 2018, which will require the Company to provide extensive skills training.</p>
---	---

**Training Plan**

<p><b>Need for Training</b></p>	<p>In addition to a new CRM System, employees are expected to utilize more than 25 different technology systems used within the organization. A comprehensive training program will focus on leadership, recruiting, account management, sales, systems, finance, accounting and technology. Overall, training will allow Proven Recruiting to understand each worker’s roles in all phases of the recruitment process.</p> <p>Proven Recruiting assessed its current and future training needs and determined that 80 weighted average hours will be provided to its existing and newly hired workforce in a 21-month training period. However, the Company only requests ETP funding for 45 weighted average hours for each trainee.</p>
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Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- Class/lab     
  E-Learning     
  CBT     
  Productive Lab

Business Skills	Commercial Skills	Computer Skills
<p><b>Training Infrastructure &amp; Administrative Plan</b></p>	<ul style="list-style-type: none"> <li>• <b>Coordination of Training (Oversight):</b> The Co-Founder/CEO will oversee all project administration as well as the implementation of training at its San Diego location. The Operations Coordinator will oversee the administration and implementation of training at its Los Angeles location.</li> <li>• <b>Trainers:</b> In-house experts and potential training vendors, if necessary.</li> <li>• <b>Administrative Duties:</b> Proven Recruiting has retained an administrative subcontractor to assist with project administration.</li> </ul>	

**RECOMMENDATION**

Staff recommends approval of this proposal and modifications.

**SUBCONTRACTORS**

<b>Subcontractor Type</b>	<b>Subcontractor Name</b>	<b>City</b>	<b>Cost / %</b>
<ul style="list-style-type: none"> <li>• Development</li> </ul>	Training Funding Source	Seal Beach	\$3,900
<ul style="list-style-type: none"> <li>• Administrative</li> </ul>	Training Funding Source	Seal Beach	Not to exceed 13% of payment earned
<ul style="list-style-type: none"> <li>• Training Vendors</li> </ul>	To Be Determined	N/A	N/A

**Exhibit B: Menu Curriculum****Class/Lab and E-Learning Hours**

8 – 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting/Audit/Tax
- Activity Management
- Bookkeeping
- Blockchain Technology
- Brand Development
- Business Analysis
- Conflict Management
- Coaching Skills
- Data Science & Analytics
- Digital Citizenship/Cyber Security Awareness
- Financial Planning and Analysis
- Leadership Skills
- GRIT
- Payroll Procedures
- Profit & Loss Management
- Planning/Goal Setting
- Process Improvement
- Project Management
- Research & Planning
- Sales Skills
- Start with Why
- Teamwork
- Time Management

**COMMERCIAL SKILLS**

- Account Management
- After Placement Follow-Up Candidates
- Candidate Send-Out Prep/Debrief
- Candidate Marketing
- Client Meetings Best Practices
- Client Send-Out Prep/Debrief
- Compensation Management
- Counter Offer Management
- Day @ Proven Recruiting
- Engaging Candidates
- Gathering Feedback
- Job Order In-Take Call
- Multi-Purposing Every Conversation
- Negotiating Agreements
- Next Level Exchange
- Pipeline Management
- Presenting Offers
- Prospecting for New Clients and Candidates

- Qualifying Candidates and Clients
- Rules of Engagement for Recruiters
- Recruiting Life Cycle Basics
- Recruiter Toolkit
- Reference Checking
- Setting & Managing Expectations
- Soliciting Job Orders
- Sourcing and Boolean Basics
- Structured Interviews for Candidates
- 1099 vs W2

### **COMPUTER SKILLS**

- Bullhorn Applicant Tracking System Basics
- Bullhorn Advanced Skills
- Customer Relationship Management
- Cyber Security
- Job Boards: CareerBuilder, Dice, Monster
- LinkedIn Recruiter Basics
- LinkedIn Sales Navigator
- Microsoft Outlook, Word, Excel, Powerpoint
- OneNote
- Project Management
- Software Development
- Software Quality Assurance & Testing
- Systems & Networks
- Tallie
- TextKernal
- TextUs
- ZoomInfo

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



**Training Proposal for:  
PSM Industries, Inc.**

**Small Business**

**ET19-0313**

**Approval Date:** October 12, 2018

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

**CONTRACTOR**

- Type of Industry: Manufacturing (E)  
  
Priority Industry:  Yes  No
- Number of Full-Time Employees  
California: 91  
Worldwide: 164  
Number to be trained: 75  
Owner  Yes  No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 12%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$48,750
- In-Kind Contribution: \$38,600

**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 HUA Priority	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills	75	8-60	0	\$650	\$13.25
				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.

- Reimbursement Rate: \$26 Small Business Rate
- County(ies): Los Angeles
- Occupations to be Trained: Administrative Staff, Production Staff, Managers/Supervisors, Owner
- 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 and located in Los Angeles, PSM Industries, Inc. (PSM) ([www.pacificsintered.com](http://www.pacificsintered.com)), manufactures metal components for the aerospace, automotive, sports, and communications industries. PSM specializes in powder metallurgy fabrication used to produce complex precision parts with high durability.

PSM is facing increased raw material pricing, longer lead times for raw materials, and increased pricing in manufacturing supplies due to newly imposed tariff and increased competition. With tight gross margin, the Company plans to increase efficiency and consider more options for automation. Employees must be trained on new processes to improve employee efficiency and remain competitive in the industry.

As a supplier to the automotive industry, PSM also needs to comply with new quality standards required by major customers. To meet these new quality standards, PSM is in the process of migrating from ISO/TS 16949-2009 to IATF 16949:2016 (International Automotive Task Force). IATF is a more intensive process and requires staff training.

This is PSM's fourth ETP Agreement, and the first in the last five years. Previous training focuses on quality process, TA-16-16949AQP, ISO 14001 and streamlining processes. This proposal will focus on new quality process and IATF 16949:2016. Some curriculum courses included are repeated from the last Agreement; however, no trainee from the previous agreement will repeat those courses.

## Training Plan

**Business Skills:** Training will be provided to all occupations and focus on sales skills and supplier management and development. Training will help increase sales and grow the business.

**Computer Skills:** Training will be provided to all occupations to improve processes and maximize efficiency through problem-solving techniques and performance testing.

**Continuous Improvement:** Training will be provided to all occupations and focus on the new quality standard IATF required by major customers.

**Manufacturing Skills:** Training will be provided to Production Staff to enhance manufacturing processes and improve product quality. This training will improve product quality, reduce errors/waste and enhance manufacturing processes.

## High Unemployment Area (HUA)

Trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's location in the Los Angeles WillowBrook area bordering West Compton are in an HUA.

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 for trainees. The Company is requesting an HUA wage modification, from \$17.54 to \$13.25 per hour.

## Temporary to Permanent Hiring

PSM will train 10 Production Staff workers 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 90 days. 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 PSM 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.

## Training Infrastructure

The Company is ready to start training upon approval. The HR Specialist will oversee training and assist with enrollment, training data collection and data entry. The HR Specialist has been involved in all previous projects. Training will be delivered by in-house experts and vendors as needed.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0368	Los Angeles	12/29/16- 12/28/17	\$49,920	\$48,556 (97%)
ET13-0405	Los Angeles	06/30/11- 06/29/13	\$49,920	\$49,920 (100%)



**Exhibit B: Menu Curriculum****Class/Lab Hours**

8-60 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Sales Skills
- Job Quotations
- Supplier Management
- Supplier Development

**COMPUTER SKILLS**

- Statistical Process Control (WINSPC)
- Programmable Logic Controllers (PLC)
- Resonance Testers
- Electronic Data Management
- Microsoft Office

**CONTINUOUS IMPROVEMENT**

- IATF Quality Standards
- Process Improvement
- Project Management
- Frontline Leadership
- Visual Factory
- Conflict Resolution

**MANUFACTURING SKILLS**

- Manufacturing Process
- Work Instruction
- Automation
- Equipment Operation
- Scrap Reduction
- Metrology

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
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**Retrainee - Job Creation  
Training Proposal for:  
RuffStuff Specialties, Inc.**

**Small Business**

**ET19-0308**

**Approval Date:** October 24, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Mam

**CONTRACTOR**

- Type of Industry: Manufacturing Food Processing (E)  
Retail (44-45)  
Priority Industry:  Yes  No
- Number of Full-Time Employees  
California: 30  
Worldwide: 30  
Number to be trained: 40  
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: \$62,400
- In-Kind Contribution: \$59,890

**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, Commercial Skills, Computer Skills, Cont. Imprv, HAZMAT, Mfg. Skills, PL-Comm Skills, PL - Mfg. Skills	30	8-200	0	\$1,560	\$16.70
				Weighted Avg: 60			
2	Retrainee Priority Rate Job Creation Initiative SB <100	Business Skills, Commercial Skills, Computer Skills, Cont. Imprv, HAZMAT, Mfg. Skills, PL-Comm Skills, PL - Mfg. Skills	10	8-200	0	\$1,560	\$13.66*
				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 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: \$26 Small Business Rate
- County(ies): Placer
- Occupations to be Trained: Sales Staff, Marketing Staff, Fabricator, Welder, Administrative Staff, Shipping/Purchase Logistics, CAD Designer, Manager, Owner
- Union Representation:  Yes  
 No
- Health Benefits: Job #1: \$1.70 per hour Job #2: \$1.16 per hour

**SUBCONTRACTORS**

- Development Services: Synergy Management Consultants, LLC in Grass Valley assisted with development services for a flat fee of \$3,744.
- Administrative Services: Synergy Management Consultants, LLC will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

## **OVERVIEW**

Founded in 1980 and located in Loomis, RuffStuff Specialties, Inc. (RuffStuff) ([www.ruffstuffspecialties.com](http://www.ruffstuffspecialties.com)) is a manufacturer and wholesale retailer of custom parts for off road and utility vehicles (UTV) such as Rock Crawlers and Jeeps. RuffStuff also produces high-end components for four-wheel drive vehicles. Its products are shipped worldwide. Training under this proposal will be for its sole facility in Loomis. This will be RuffStuff's second Agreement and the second in the last five years.

### **Need for Training**

Training will be provided on proper manufacturing techniques. Training will focus on specialized manufacturing components and regulations for off-road vehicles. Although training topics are similar to those provided in the prior Agreement, trainees will not repeat the same training courses previously received.

RuffStuff recently introduced a new line of products known as "kits", which are parts that lift off road utility vehicles. The Company has invested over \$200K on new manufacturing equipment such as welders, plasma tables, and CNC lathes to support the new product line. Staff will require extensive training on research and development (R&D) and manufacturing processes of the kits. The Company has also invested an additional \$200K on new software, NetSuite, to manage inventory control, sales, billing, and shipping and logistics. Training will allow staff to utilize the software and ensure proper implementation.

### **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage.

RuffStuff is expanding business capacity by hiring new employees. Due to expanded product lines, the Company has experienced a 25% increase in business in last two. Thus, the Company will hire eight new full-time employees (Job Number 2): Sales Staff, Fabricators, Administrative Staff, Shipping/Purchase Logistics, and CAD Designers. Staff will be trained on equipment to assist with the increase in production. The date-of-hire for 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 be delivered via Classroom/Laboratory and Productive Lab (PL) methods. In-house subject-matter experts and vendors, if necessary, will deliver training in the following:

**Business Skills:** Training will be offered to all occupations. Training will focus on improving sale processes, customer service, and communication. Training topics include Customer Care Skills, Advanced Sales & Marketing Skills, and Communication Skills.

**Commercial Skills:** Training will be offered to Fabricators, Welders, Marketing Staff and Sales Staff. Training will encompass maintenance-service, warranty, and off-road technologies. Training will focus on materials used on the new product line. Training topics include Product Knowledge, Suspension Systems, and Understanding UTV Vehicles.

**Computer Skills:** Training will be offered to all occupations. Training will focus on CAD designs and the NetSuite software. Training topics include Solid Works CAD, NetSuite Software, and Adobe Software.

**Continuous Improvement:** Training will be offered to all occupations. Training will focus on process improvements. Training topics include Root Cause Analysis, Quality Assurance, and Inventory Control.

**Manufacturing Skills:** Training will be offered to Fabricators, Welders, and CAD Designers. Training will focus on manufacturing processes for new and existing products for UTV vehicles. Training topics include Machining Skills, Stamping, and Press Brake.

**Hazardous Materials:** Training will be offered to Fabricators, Sales Staff, Shipping/Purchase Logistics, and Managers. Training will focus on handling and disposal of materials. Training topics include Emergency Clean-Up and Safety Handling.

### **Productive Laboratory (PL)**

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.

RuffStuff will provide PL-Manufacturing Skills and PL-Commercial Skills training for Fabricators, Welders, and CAD Designers. PL training will extend technical learning under practical working conditions without creating an excess of waste. Staff will be trained on R&D, design, fabrication and manufacturing methods and techniques (including prototyping & testing). PL will include hands on training, coaching, mentoring and feedback that will allow employees to efficiently gain more comprehensive knowledge and increased skill levels. Equipment to be used includes Mig, Tig Welders, Plasma Table and Cutters, Lathes, Saws, Bending Equipment, Drill and Mill Presses, and CAD systems.

Trainees will receive up to 24 hours of PL training with a 1:1 trainer-to-trainee ratio. Training will be taught by subject-matter experts with demonstrated knowledge and expertise in the field. Instructors will monitor trainee competencies before the trainee is deemed competent.

#### ➤ Training Infrastructure

RuffStuff has a detailed plan to facilitate and administer training. The Company's HR Manager and support staff, who administered the last ETP contract, will be responsible for enrolling trainees, tracking training hours, and roster collection. Additionally, the Company has retained a third-party subcontractor with extensive ETP experience to assist with administration.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0310	Loomis	12/13/2015 – 12/22/2017	\$50,128	\$45,981 (92%)

**Exhibit B: Menu Curriculum****Class/Lab Hours**

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- ✚ Advanced Sales & Marketing Skills
  - Closing Sales
  - Managing Accounts
  - Marketing Plans and Deployment
  - Sales Procedures & Strategies
- ✚ Communication Skills
- ✚ Conflict Resolution
- ✚ Customer Care Skills
  - Customer Relationship Building
- ✚ Negotiation Skills

**COMMERCIAL SKILLS**

- ✚ All Wheel Drive Systems
- ✚ OEM (Original Equipment Manufacturer)/Aftermarket Skills
- ✚ Product Knowledge
- ✚ Suspension Systems
- ✚ Understanding UTV Vehicles

**COMPUTER SKILLS**

- ✚ Adobe Software
- ✚ Microsoft Office Suite (Intermediate)
- ✚ Netsuite Software
- ✚ Quickbooks Software
- ✚ Solid Works CAD
- ✚ Torchmate CAD

**CONTINUOUS IMPROVEMENT**

- ✚ Inventory Control
- ✚ Leadership Skills
- ✚ Lean Concepts/Lean Production/Lean Office
- ✚ Problem Solving Skills
- ✚ Quality Assurance
- ✚ Root Cause Analysis
- ✚ Standard Operating Procedures
- ✚ Teambuilding

**HAZARDOUS MATERIALS**

- ✚ Completing Material Safety Data Sheets (MSDS)
- ✚ Emergency Clean-up
- ✚ Registration, Evaluation, Authorization & Restriction of Chemical Substances
- ✚ Safety Handling

**MANUFACTURING SKILLS**

- ✚ Bending
  - Tube Bender
  - Tube Notcher
- ✚ Component Setup
- ✚ Cutting Operations
  - Band Saw Operations

- Plasma Cutting
- ✚ Die Making
- ✚ Machine Maintenance
- ✚ Machining Skills
  - CNC Operations Milling
  - CNC Operations Turning
  - CNC Programming Set Up
  - Drill Press Skills
  - Grinding Skills
  - Job Planning, Benchwork, Layout
  - Lathe Operation
  - Manual Milling Skills
  - Measurement, Materials and Safety
  - Metal Forming
  - Turning Operations
- ✚ Press Brake
  - Drive Press Brake Skills
  - Non-CNC Setup Press Brake
- ✚ Screw Machining
  - Single Spindles
  - Multiple Spindles
- ✚ Slide Forming
  - Set Up and Operations
- ✚ Stamping
  - Compound Dies
  - Progressive Dies
  - Tooling Process
- ✚ Welding
  - Mig Welding
  - Tig Welding

### **Productive Lab Hours**

0-24

#### **MANUFACTURING SKILLS** (1:1 trainer-to-trainee ratio)

- ✚ Bending Equipment
- ✚ CAD Process
- ✚ Component Design
- ✚ Cutting Equipment Skills
- ✚ Die Making
- ✚ Machining Skills
- ✚ Plasma Cutting
- ✚ Press Brake Skills
- ✚ Screw Machining Skills
- ✚ Stamping Skills
- ✚ Torchmate Process
- ✚ Welding
- ✚ Welding Aluminum

#### **COMMERCIAL SKILLS** (1:1 trainer-to-trainee ratio)

- ✚ Off Road Vehicle Dynamics

Safety Training cannot exceed 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.



**Training Proposal for:  
SolarFlare Communications, Inc.**

**Delegation ≤ \$75,000 Single Employer**

**ET19-0315**

**Approval Date:** November 1, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**CONTRACTOR**     [www.solarflare.com](http://www.solarflare.com)

- Type of Industry: Services (G)  
Priority Industry:  Yes  No
- Number of Full-Time Employees  **Small Business**
  - California: 71
  - Worldwide: 213
  - Number to be trained: 71Small Business Only:  
Owner  Yes  No
- Out-of-State Competition:  Yes  No
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 3%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$73,840
- In-Kind Contribution: \$186,856



**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	ETP Required Wage*
				Class / Lab	CBT		
1	Priority SB<100	Business Skills, Computer Skills, Comm'l. Skills, Cont. Imp.	71	8-200	0	\$1,040	\$17.03
				Weighted Avg: 40			

- Reimbursement Rate: \$26 Priority/Program Initiatives
- County(ies): Orange, San Diego
- Occupations to be Trained: Administrative Support Staff, Accounting & Finance Staff, Human Resources Staff, Information Technology Staff, Procurement/Inventory Staff, Laboratory Staff, Sales & Marketing Staff, Operations Staff, Engineer, Technician, Chief Hardware Architect, Manager, Director, Executive Staff, Owner
- Union Representation for Trainees:  Yes  No
- Health Benefits: (Employer Paid to Meet ETP Wage)  No  Yes

**OVERVIEW**

<b>Year Company Founded:</b>	2001	<b>Company Headquarters:</b> <input type="checkbox"/> Single location Irvine
<b>Facility Locations Outside CA</b>	<ul style="list-style-type: none"> <li>• Cambridge, United Kingdom</li> <li>• New Delhi, India</li> </ul>	
<b>Total Number of Facility locations in California</b>	2	
<b>Facility location(s) where training will occur</b>	<ul style="list-style-type: none"> <li>• San Diego</li> <li>• Irvine (headquarters)</li> </ul>	

<b>Nature of Business</b>	SolarFlare Communications, Inc. (SolarFlare) provides application-intelligent networking input/output software and hardware platforms that accelerate, monitor, and secure network data. This includes large-scale electronic transfer of information with low data loss at high speeds. The Company also provides performance network interface cards, software, and networking solutions to over 22 distributors, 180 Value-Added Resellers, and 1,650 customers around the world.
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<b>Customer Base</b>	Customers include financial institutions such as banks; electronic trading companies such as NASDAQ; large online retailers such as Alibaba and Google; and computer manufacturers such as Dell.
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<b>Business / Industry Needs / Changes</b>	<p>Training is driven by increased industry and customer demands. Technology in the industry is constantly changing and SolarFlare’s customers are requiring specific software and hardware improvements to meet technological needs. The Company must develop new and upgrade products and services to improve components and design technologies capable of utilizing the latest advances in processor speed and hard drive capacity.</p> <p>Two of SolarFlare’s large-scale customers, NASDAQ and Amazon Web Services, require software and hardware products created specifically for data transfer at secure and almost instantaneous speeds. To address this demand, the Company is upgrading its Peripheral Component Interconnect, (a component that inputs/exports data to/from computer) to new generations to allow for low latency transfer for large amounts of data. Technological upgrades will allow the Company to meet increased customer requirements, and to remain competitive in the global market.</p>
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**Training Plan**

<b>Need for Training</b>	<p>Training will focus on software and hardware developments, and improvements necessary to develop and upgrade products in hyper scale platforms.</p> <p>With challenges in data privacy in the industry, training will also focus on data information protection as the amount of data created and stored continues to grow at unprecedented rates. Training in data protection across various industry sectors is also necessary to keep pace with changing guidelines as well as to prepare new data protection safeguards for new customers.</p> <p>ETP funding will help the Company provide extensive business, commercial, computer and continuous improvement skills training to its new and existing employees. Training will provide workers the skills to improve product knowledge, quality, and efficiency in all phases of software and hardware development process.</p>
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Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- Class/lab     
  E-Learning     
  CBT     
  Productive Lab

<b>Business Skills</b>	<b>Commercial Skills</b>	<b>Computer Skills</b>
<b>Continuous Improvement</b>		

<p><b><i>Training Infrastructure &amp; Administrative Plan</i></b></p>	<ul style="list-style-type: none"> <li>• <b>Coordination of Training (Oversight):</b> The Director of Global Human Resources will oversee the ETP project. Department Managers will schedule, oversee, and manage training at their department at each location.</li> <li>• <b>Trainers:</b> In-house experts and vendors as needed.</li> <li>• <b>Administrative Duties:</b> An administrative subcontractor will assist with project administration. Two Human Resources Staff members will work together to submit copies of completed attendance rosters to administrative subcontractor for uploading in the ETP Online System.</li> </ul>
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### **RECOMMENDATION**

Staff recommends approval of this proposal and modifications

### **SUBCONTRACTORS**

<b>Subcontractor Type</b>	<b>Subcontractor Name</b>	<b>City</b>	<b>Cost / %</b>
• Development	Welsh Advisors	Anaheim	\$5,236.14
• Administrative	Welsh Advisors	Anaheim	Not to exceed 13% payment earned
• Training Vendors	To Be Determined	N/A	N/A

**Exhibit B: Menu Curriculum****Class/Lab/E-Learning Hours**

8 – 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Leadership Skills
- Communication Skills
- Project Management
- Teambuilding Skills
- International Business Procedures
- Human Resources Procedures

**COMMERCIAL SKILLS**

- Product Development
- Network Security
- Business Applications
- Market Needs Analysis
- Product Knowledge
- Silicon Operations
- Equipment Operations

**COMPUTER SKILLS**

- HR Information Systems
- Salesforce
- Customer Relationship Management
- Hyperscale Computing
- Open Source Software
- SIRTl
- Electronic Trading
- Data Protection
- Software Development
- Hardware Development
- Financial and Accounting Software

**CONTINUOUS IMPROVEMENT**

- Quality Assurance
- Process Improvement

Reimbursement for retraining is capped at 200 total hours, per trainee, regardless of method of delivery.
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**Training Proposal for:  
TigerConnect, Inc.**

**Small Business**

**ET19-0303**

**Approval Date:** October 24, 2018

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

**CONTRACTOR**

- Type of Industry: Transportation/Communication (I)  
Information / Multi Media (51)  
Priority Industry:  Yes  No
- Number of Full-Time Employees  
California: 85  
Worldwide: 118  
Number to be trained: 85  
Owner  Yes  No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 13%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$66,300
- In-Kind Contribution: \$127,500

**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; Continuous Impr; Management Skills	85	8-60	0	\$780	\$17.54
				Weighted Avg: 30			

- Reimbursement Rate: \$26 Small Business Rate
- County(ies): Los Angeles County
- Occupations to be Trained: Marketing Staff, Sales Staff, Finance and Operations Staff, Client Organization Staff, Engineering and Product Development Staff, Manager/Supervisor
- 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 2010, TigerConnect, Inc. ([www.tigerconnect.com](http://www.tigerconnect.com)), (TigerConnect) is a software company that provides innovative clinical communication and collaboration technology software solutions to the healthcare industry. Products consist of mobile communication platforms, namely TigerText Essentials (Secure Messaging), TigerFlow (Clinical Communications) and TigerFlow Enterprise (Advanced EHR Integration), designed to facilitate secure and efficient communication between clinicians and their patients. TigerConnect is currently servicing more than 4,000 healthcare organizations which includes Torrance Memorial, Adventist Health, Hoag Hospital and White Memorial Medical Center. This is TigerConnect's first ETP proposal.

**Need for Training**

TigerConnect's software technology is supported by continuous research and development to sustain capabilities. New product features are released every 6 months which requires company-wide training. Thus, the Company spends approximately \$150,000 annually for company-wide training twice a year. ETP-funded training will focus on operations, processes and new products—necessary for the Company to keep pace with rapid business growth.

Training in leadership skills, problem-solving, and conflict management will increase employee skills to build a solid foundation of skilled workers.

## **Training Plan**

**Business Skills:** Training will be offered to the Marketing, Sales, Finance & Operations, Client Organization, and Engineering and Product Staff. Trainees will include strategies within the market, business plans for the year, and product knowledge. Additionally, communication skills and interpersonal skills will be offered to improve customer interactions. Sales and Client Organization staff will be trained in customer services and sales skills to improve customer conflict resolution, telephone and in-person sales skills, and general customer relations.

**Management Skills:** Training will be offered to Managers/Supervisors only. Training will focus on improving leadership skills and decision making. Skills will include direct reports, teambuilding, and managing different individuals.

**Continuous Improvement:** Training will be offered to the all occupations. Training will enhance problem-solving and decision making skills.

### ➤ Training Infrastructure

Training will be provided by in-house subject-matter experts and vendors, if necessary. The Company is ready to start training upon approval. The People Operations Partner will administer the proposal. The Company has also assigned a staff member from each department (Human Resources, Finance, and Operations) to assist with administration. In addition, a representative from each occupation group will work closely with them in facilitating the training and submitting training rosters for the ETP Online system.

## **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**

- Project Management and Methodology – Strategic Planning
- Market Business and Strategies
- Business Performance
  - Marketing
  - Business Plans
  - Product Knowledge
  - Financial Strategies
- Communication Skills
  - Negotiating
  - Conflict Management
  - Interpersonal Skills
- Customer Service
  - Customer Relations
  - Telephone Skills
  - Identifying Customer Needs
  - Resolving Customer Complaints
- Sales
  - Customer Needs
  - Product Knowledge
  - Customer Complaints

**CONTINUOUS IMPROVEMENT**

- Problem Solving and Decision Making
- Teamwork Development Skills

**MANAGEMENT SKILLS** (limited to Managers/Supervisors only)

- Leadership Skills
- Decision Making
- Motivation
- Teambuilding
- Coaching Procedures and Management Style

Safety Training will be limited to 10% of total training hours per-trainee.

Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.





**Retrainee - Job Creation  
Training Proposal for:  
True Line Railing, Inc.**

**Small Business**

**ET19-0312**

**Approval Date:** October 24, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** J. Romero

**CONTRACTOR**

- Type of Industry:

Construction (C)

Services (61,71,72,81,92)

Priority Industry:  Yes  No

- Number of Full-Time Employees

California: 21

Worldwide: 21

Number to be trained: 26

Owner  Yes  No

- Out-of-State Competition:

NAICS Code Eligible

- Special Employment Training (SET):

Yes  No

- High Unemployment Area (HUA):

Yes  No

- Turnover Rate:

5%

- Repeat Contractor:

Yes  No

**FUNDING**

- Requested Amount:

\$26,390

- In-Kind Contribution:

\$39,585

**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, Commercial Skills, Computer Skills, Continuous Improvement, OSHA10/30 PL-Commercial	21	8-60	0	\$1,040	\$17.54
				Weighted Avg: 40			
2	Retrainee Job Creation Initiative SB <100 Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, OSHA10/30 PL-Commercial	5	8-60	0	\$910	*\$14.62
				Weighted Avg: 35			

\*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.

- Reimbursement Rate: Job #'s 1 & 2: \$26 Small Business Rate
- County(ies): Los Angeles County
- Occupations to be Trained: Installer, Project Lead Person, Estimator, Project Engineer, Supervisor/Manager, Owner
- Union Representation:  Yes  
 No
- Health Benefits: Job #'s 1 & 2: \$2.50 per hour

**SUBCONTRACTORS**

- Development Services: Training Funding Source (TFS) in Seal Beach assisted in the development of this ETP proposal for a flat fee of \$1,900.
- Administrative Services: TFS will provide administration services for an amount not to exceed 13% of payment earned.
- Training Vendors: To be determined.

**OVERVIEW**

Founded in 2013, True Line Railing, Inc. ([www.truelinerailing.com](http://www.truelinerailing.com)), (True Line) is a full service supply and installation source for all commercial railing needs. The Company specializes in aluminum tube railing, stainless steel railing, frameless glass panel rails and OSHA approved Safety Railing, and also provides full-service and installation of decking and tiles.

True Line has the capability to provide service from pre-construction budgets to project completion, providing completely executed railing installation for the most complex jobs with short time lines and excellent service. True Line focuses on meeting clients' railing needs in multi-family, commercial, retail and condo retrofit sectors. Some notable projects include Legendary Tower Glendale, Marina Shores, Redondo Beach Hotel and T-Lofts.

This is True Line's first ETP proposal. True Line's need for training is based on its continued growth in the last four years and increase market demand for their products and services brought by a growing market in the construction industry.

## Training Plan

Training will upgrade employee skills by providing training in high-technology construction procedures. The Company is implementing new software and developing new policies and procedures to maintain quality and service, standardize internal controls, and maximize efficiency to keep up with growth. Training will also improve field installation job skills, trade related skills, job cost management, upgraded administrative procedures and communication skills.

**Business Skills:** This training will be offered to Installers, Project Leads, Supervisor/Managers, and Owner in order to gain skills and competency in reading architectural documents, interpret contracts, process change orders, improve coaching and communication skills and develop better writing skills and improve customer satisfaction.

**Commercial Skills:** This training will be offered to Installers, Project Leads, Estimator, Supervisors and Managers so they can follow construction/worksite procedures, properly operate equipment and tools, follow field operational procedures and Installation procedures, and improve estimating skills.

**Computer Skills:** This training will be offered to Project Engineers, Project Leads, Supervisor/Managers so they can operate following software: Adobe Acrobat, BlueBeam, Digital job documents, Microsoft office, 365, ProCore, SAGE ERP, Time tracking and Windows 10.

**Continuous Improvement:** This training will be offered to all occupations so they can improve their understanding of company processes, and gain skills in team building and problem solving.

**Osha 10/30:** This training will be provided to Installers, Project Leads, Supervisor/Managers.

## Certified Safety Training

1. 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 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. This training will be offered to Field Installers, Estimators, Engineers, and Supervisors/Managers to ensure a safe work environment.

## Productive Laboratory (PL)-Commercial Skills

Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training. True Line will provide approximately 30 hours of PL training to Installers, Project Engineers and Estimators on various processes and equipment used during construction listed in their

curriculum under PL-Commercial Skills. This training cannot be duplicated in a Class/Lab setting as the equipment is large and complex. PL training will be conducted at construction sites. ETP ratio requirement is 1:1. However, the Company is requesting a maximum trainer-to-trainee ratio of 1:2 as some equipment requires two employees to operate.

### **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.

True Line has grown from 12 employees in 2013 to a total of 23 employees in 2018. For this proposal, True Line has committed to hiring 5 new employees as (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.

True Line will recruit, hire, and train these 5 new employees within the next two years to fill in positions that will be created in response to the Company’s growing workload due to expanding business operations. Training in this proposal will help newly-hired personnel confidently transition into performing effectively and efficiently.

### **Commitment to 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

True Line is ready to start training upon approval of this proposal. The Chief Financial Officer and a Human Resources staff member will serve as project administrators, working with department heads to schedule and coordinate training. True Line also retained the services of Training Funding Source to assist with enrollment, data collection, and data entry into ETP systems. Training will be delivered by a combination of in-house staff and vendors that are currently being considered by the Company.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

**Exhibit B: Menu Curriculum**

Trainees may receive any of the following:

**Class/Lab Hours**

8 – 60

Trainees may receive any of the following:

**BUSINESS SKILLS**

- How to read architectural documents
- Change order process management
- Coaching and communication skills
- Contracts management and compliance
- Conflict management
- Customer satisfaction
- Leadership
- Planning
- Performance management

**COMMERCIAL SKILLS**

- Change order process
- General construction/worksite procedures
- Equipment and tool operations
- Field operational procedures
- Installation procedures
- Continuous improvement: estimating
- Metal/Steel/Aluminum Railing Installation
- Site Logistics
- Walk through procedures
- Zero punch list

**COMPUTER SKILLS**

- Adobe Acrobat
- BlueBeam
- Digital job documents management
- Microsoft office, 365
- ProCore
- SAGE ERP software
- Time tracking
- Windows 10

**CONTINUOUS IMPROVEMENT**

- Process and productivity improvement
- Team Building/ Problem Solving

**OSHA 10/30**

- OSHA 10
- OSHA 30

**Productive Lab**

0 – 30

**PL - COMMERCIAL SKILLS (1:2 Ratio)**

- Change order process
- General construction/worksite procedures
- Equipment and tool operations
- Field operational procedures
- Installation procedures
- Continuous improvement: estimating
- Metal/Steel/ Aluminum/Glass Railing Installation
- Site Logistics
- Walk through procedures

Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.



**Training Proposal for:  
Uniluv Marketing, Inc. dba Skech**

**Delegation ≤ \$75,000 Single Employer**

**ET19-0311**

**Approval Date:** October 24, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**CONTRACTOR**     [www.skechit.com](http://www.skechit.com)

- Type of Industry: Manufacturing (E)  
Priority Industry:  Yes  No
- Number of Full-Time Employees  **Small Business**
  - California: 13
  - Worldwide: 13
  - Number to be trained: 12Small Business Only:  
Owner  Yes  No
- Out-of-State Competition:  Yes  No
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 13%
- Repeat Contractor:  Yes  NO

**FUNDING**

- Requested Amount: \$16,224
- In-Kind Contribution: \$20,543

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	ETP Required Wage*
				Class / Lab	CBT		
1	Small Business Priority / Retrainee	Computer Skills, Continuous Impr	12	8-200	0	\$1,352	\$17.03
				Weighted Avg: 52			

- Reimbursement Rate: \$26 Priority / Program Initiatives
- County(ies): San Diego
- Occupations to be Trained: Customer Service, Sales, Administrative Support, Accounting, Manager, Operations Director, Executive Staff, Owner
- Union Representation for Trainees:  Yes  No
- Health Benefits: (Employer Paid to Meet ETP Wage)  No  Yes

**OVERVIEW**

<b>Year Company Founded:</b>	2011	<b>Company Headquarters:</b> <input checked="" type="checkbox"/> Single location San Diego, CA
<b>Facility location(s) where training will occur</b>		San Diego, CA

<b>Nature of Business</b>	Uniluv Marketing, Inc. dba Skech (Skech) is a manufacturer, wholesaler, and retailer of smartphone and tablet accessories such as phone/tablet cases, car mounts, and screen protectors. The Company also provides marketing, sales, warehouse, and distribution services to various retailers across the US.
<b>Customer Base</b>	Direct consumers and small to mid-sized retailers, wireless dealers, and distributors such as Target, Walmart, AT&T, and T-Mobile.

<b>Business / Industry Needs / Changes</b>	<p>This will be Skech’s second Agreement, the second in the last five years. In the previous project, training focused on extensive computer skills training for the Company’s newly implemented Enterprise Resource Planning (ERP) system to support customer demands and facilitate growth. Skech projects continued growth as it plans to improve distribution services through indirect channels.</p> <p>For this project, the Company is focusing on increasing wholesale distribution to big box retailers, wireless dealers, and large distributors. These customers require the Company to install an Electronic Data Interchange (EDI) system to its current ERP to submit orders. The ERP is also currently undergoing system advances to allow fully integrated automations, requiring employees to learn new functions, capabilities, and procedures. The Company will add Customer Relationship Management (CRM), assembly building, and custom workflows and automations</p>
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	upgrades to create a fully integrated and enhanced ERP System. These upgrades will allow the Company to improve overall productivity, increase efficiency, decrease costs, and streamline processes within the Organization.
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**Training Plan**

<b><i>Need for Training</i></b>	<p>The proposed training plan will build upon training delivered in the previous project.</p> <p>Training will focus on Computer Skills and Continuous Improvement. Training will allow employees to understand new fields and automations, advanced PDF templates, campaign building, and EDI system communications. Training will help the Company maintain customer requirements, support overall business expansion, and remain competitive in the marketplace.</p>
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Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- Class/lab     
  E-Learning     
  CBT     
  Productive Lab

<b>Computer Skills</b>	<b>Continuous Improvement</b>
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**Modifications from Standard**

<input checked="" type="checkbox"/> Weighted Average Hours over 45	52 Hours
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Modification(s) fall within Panel guidelines whereas, the Company needs extensive training for its complex ERP system.

Skech was able to provide an average of 60 training hours to 11 trainees within 2 months of the 9-month training period. The significant amount of training was necessary to provide training needed through the go-live phase of the ERP system.

For this project, the Company conducted a training needs assessment, which determined that 11 workers will require an average of 56 hours of training and an in-house trainer (super user) will require 10 hours of training as part of the Train-the-Trainer program. As such, the request for 52 training hours per trainee is required to support the business goals mentioned above.

<b><i>Training Infrastructure &amp; Administrative Plan</i></b>	<p><b>Coordination of Training (Oversight):</b> The Company’s Director of Operations will oversee the ETP project including the administration and implementation of training.</p> <p><b>Trainers:</b> Trainers will consist of an in-house subject-matter expert and vendors, if necessary. Training will start at contract approval.</p> <p><b>Administrative Duties:</b> The Company’s Product and Web Manager (who administered the prior ETP Agreement).will provide day-to-day administration of the ETP project.</p>
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**Repeat Contract**

<b>Number Of Agreements in last 5 years:</b>	1
<b>Training provided / focus in last Agreement:</b>	Company-wide training on the newly-purchased ERP software system which focused on the beginning stages of implementation.
<b>Difference in Training Plan:</b>	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. Further, ERP training topics will be intermediate or advanced, depending on each phase of implementation of module upgrades.

**ACTIVE PROJECTS**

The following table summarizes performance under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
18CS-0141	\$15,600	11/8/2017 – 11/7/2018	11	11	11

\*The last day of training was 1/5/18. Skech documented 660 eligible training hours to equal more than 100% of the Agreement amount for 11 trainees who completed the maximum training hours (60). The Company has submitted and received \$11,700 in progress payments. Skech submitted the final closeout invoice on 8/1/18 and is currently being processed by ETP for projected final earnings of \$15,600 (100%).

**RECOMMENDATION**

Staff recommends approval of this proposal.

**SUBCONTRACTORS**

Subcontractor Type	Subcontractor Name	City	Cost / %
• Development	N/A		
• Administrative	N/A		
• Training Vendors	To Be Determined	N/A	N/A

**Exhibit B: Menu Curriculum**

**Class/Lab and E-Learning Hours**

8 – 200 Trainees may receive any of the following:

**COMPUTER SKILLS**

- ✚ Netsuite Software Management Skills
  - Advanced KPI and Saved Search Reporting
  - EDI Trading Partner requirements and Procedures
  - Product Maintenance and Connector Feed Updates

**CONTINUOUS IMPROVEMENT**

- ✚ Train the Trainer
- ✚ Assembly Building/Work Orders and Forecasting Transfer Orders and Consignment Locations
- ✚ Email Marketing Campaign Management
- ✚ New Department Workflow and Functionalities
  - Shipping Automation Workflow
  - Amazon Returns and Seller Fees
  - Automation/Integration
  - Sell Through and Customer Sales Trend Reporting
  - Advanced Shipping and Labeling

Reimbursement for retraining is capped at 200 total hours per trainee, regardless of method of delivery.
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**DELEGATION ORDER**

**Retrainee - Job Creation  
Training Proposal for:**

**Vinotheque Wine Cellars, dba WhisperKOOL Corp.**

**Small Business**

**ET19-0317**

**Approval Date:** November 1, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Jones

**CONTRACTOR**

- Type of Industry: Manufacturing (E)  
Priority Industry:  Yes  No
- Number of Full-Time Employees  
California: 70  
Worldwide: 70  
Number to be trained: 66  
Owner  Yes  No
- Out-of-State Competition: NAICS Code Eligible 33415
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 3%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$60,060
- In-Kind Contribution: \$32,326

## **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 HUA	Business Skills, Continuous Improvement, Manufacturing Skills	60	8-200	0	\$910	\$12.53
				Weighted Avg: 35			
2	Retrainee Job Creation Initiative SB <100 Priority Rate	Business Skills, Continuous Improvement, Manufacturing Skills	6	8-200	0	\$910	*\$11.00
				Weighted Avg: 35			

\*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.

- Reimbursement Rate: Job #1 & 2: \$26 Small Business Rate
- County(ies): San Joaquin
- Occupations to be Trained: Production Staff, Administrative Staff, Management
- Union Representation:  Yes  
 No
- Health Benefits: Job #1: \$0.53 per hour

## **SUBCONTRACTORS**

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: Cookson Consulting, LLC of Sacramento will provide Business Skills training.

## **OVERVIEW**

Founded in 1995 and headquartered in Stockton, Vinotheque Wine Cellars, dba WhisperKOOL Corp. (WhisperKOOL) (<http://whisperkool.com/>) manufactures cooling units for commercial and residential wine cellars. The cooling units are designed to cool wine slowly, maintaining the ideal temperature and humidity for wine storage. WhisperKOOL's commercial customers include The Wine Enthusiast, Wine Racks of America, Wine Cellar Innovations, RB Sales LLC, Wineracks.Com, and Leisure Product Systems. The Company also manufactures cooling units for residential clients with personal wine cellars in their homes.

This will be WhisperKOOL's first ETP Agreement. Training will take place at the Company's Stockton location.

## **Project Details**

Training will be provided by senior level staff and managers, designed to increase trainee skills and promotional opportunities for staff. Training will make production practices more efficient and reduce production waste. Courses include The Seven Quality Control Tools, Communication is the Key to Teamwork, and Practical Problem Solving.

Training will also focus on production and marketing of the Company's two new cooling units, the 24 Volt Infield Conversion Kit and Copeland Condensing Unit. These new cooling units are designed to be more energy efficient, saving customer's money and reducing environmental impact. Traditionally, the compressors used in wine cellar cooling units have been loud. WhisperKOOL's new units, however, are designed for noise reduction, creating a quiet wine cellar for customers. Training on these new products will ensure staff have the knowledge and skills to produce and market the cooling units. Courses include 3P Production Preparation Process, and Dealing with the Seven Deadly Wastes.

Training on production practices and equipment is needed to ensure trainees have the knowledge to be successful at WhisperKOOL. The courses are designed to increase production capabilities, ensuring WhisperKOOL can meet the needs of their clients. Training on Product Knowledge will also be provided to Administrative Staff to ensure staff have the knowledge to better market and promote WhisperKOOL products.

## **Training Plan**

WhisperKOOL will provide Class/Lab training delivered by in-house experts and vendors in the following:

**Business Skills:** Training will be provided to all occupations to promote administrative efficiency and a culture of leadership. Training topics include Project Management, Product Knowledge and Leadership.

**Manufacturing Skills:** Training will be offered to Production Staff and Management to increase production efficiency and consistency in production processes. Training topics include Hand Tools, The Kaizen Way, Total Production Maintenance, and New Product Production Processes.

**Continuous Improvement:** Training will be offered to all occupations. Training topics will include Communication is the Key to Teamwork, Attitude is Everything, Learn and Grow, Transforming Your Value Streams, Practical Problem Solving, Workplace Visualization, and Practice Makes Progress.

## **Retrainee - Job Creation**

The Panel offers incentives to companies that commit to hiring new employees. Trainees will be subject to a lower post-retention wage.

WhisperKOOL is expanding its product offerings to include two new cooling units. The new products are expected to increase production by 5% over the next fiscal year. The increased production requires WhisperKOOL hire and train Production and Administrative Staff.

WhisperKOOL will hire six new employees (Job Number 2). The date-of-hire for 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 Infrastructure**

The Human Resources Supervisor will oversee all administration and implementation of training including scheduling, and record-keeping compliance. The Administrative Assistant will assist with administration. WhisperKOOL has a training plan in place and is ready to begin upon approval.

### **High Unemployment Area**

Trainees work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages.

#### ➤ Wage Modification

The Company requests a wage modification, from \$16.70 per hour to \$12.53 per hour, for the 60 trainees in Job Number 1, and from \$13.66 per hour to \$11.00 per hour, for the 3 trainees in Job Number 2.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **Exhibit B: Menu Curriculum**

Trainees may receive any of the following:

#### **Class/Lab Hours**

8-200

#### **BUSINESS SKILLS**

- Leadership
- Product Knowledge
- Project Management

#### **CONTINUOUS IMPROVEMENT**

- How to Be Successful at WhisperKOOL
  - A3 Thinking
  - Attitude is Everything
  - Built in Quality
  - Communication is the Key to Teamwork
  - Learn and Grow
  - Practical Problem Solving
  - Practice Makes Progress
  - The Seven Quality Control Tools
  - Transforming Your Value Streams
  - Workplace Visualization

#### **MANUFACTURING SKILLS**

- 3P Production Preparation Process
- 5S Workplace Productivity
- Dealing with the Seven Deadly Wastes
- Forklift/Material Handling
- Hand Tools
- Hazard Communication/SDS
- Lock-out/Tag-out
- New Product Production Processes
- Production Safety
- The Kaizen Way
- Total Production Maintenance

\*Safety Training will be limited to 10% of total training hours per-trainee.

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