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Panel Meeting of February 23, 2017

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Memorandum

To:               Panel Members

From: Stewart Knox
Executive Director

Subject: Directions to Meeting Site

The Employment Training Panel will meet on THURSDAY, February 23, 2017 at 9:30 a.m.

New City Hall
Council Chambers, Room 1103, 1st Floor
915 I Street
Sacramento, CA 95814
Telephone (916) 327-5640 (ETP Central Office)
FAX: (916) 445-5972 (ETP Central Office)

Directions to the New City Hall Council Chambers

From Sacramento International Airport:

• Take Hwy 5 South
• Exit on “J” Street to 11th St.
• Turn Left on 11th Street
• Turn Left on I Street
• 915 I Street

From San Francisco:

• Take I-80 E
• Merge onto I-5 N
• Exit on “J” Street to 11th St.
• Turn Left on 11th Street
• Turn Left on I Street
• 915 I Street
Memorandum

To: Panel Members  

From: Stewart Knox  
Executive Director

Date: February 23, 2017  
File: Mtg. Site Memo

Subject: Future Meeting Sites

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| February 23, 2017 | New City Hall – Sacramento  
Time: 09:30 AM  
Council Chambers, Room 1103, 1st Floor  
915 I Street  
Sacramento, CA 95814 |
| March 24, 2017  | California Environmental Protection Agency  
Time: 09:30 AM  
Sierra Hearing Room, 2nd Floor  
1001 I Street  
Sacramento, CA 95814 |
| APRIL           | NO PANEL MEETING IN APRIL                                                            |
| May 25, 2017    | California Environmental Protection Agency  
Time: 09:30 AM  
Coastal Hearing Room, 2nd Floor  
1001 I Street  
Sacramento, CA 95814 |
State of California Employment Training Panel
California Environmental Protection Agency
1001 I Street
Coastal Hearing Room, 2nd Floor
Sacramento, CA 95814
December 16, 2016

Panel Members

Barry Broad  
Chair

Janice Roberts  
Vice-Chair

Gloria Bell  
Member

Sonia Fernandez  
Member

Will Koch  
Ex-Officio Member

Gretchen Newsom  
Member

Edward Rendon  
Member

Sam Rodriguez  
Member

Executive Staff

Stewart Knox  
Executive Director

Maureen Reilly  
General Counsel
STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL
California Environmental Protection Agency
1001 I Street
Coastal Hearing Room, 2nd Floor
Sacramento, CA 95814
December 16, 2016

I. PUBLIC PANEL MEETING CALL TO ORDER

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

II. ROLL CALL

Present
Barry Broad
Diane Banchero (on behalf of Will Koch, Go-Biz)
Sonia Fernandez
Gretchen Newsom
Janice Roberts

Absent
Gloria Bell
Edward Rendon
Sam Rodriguez

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

III. AGENDA

Chairman Broad asked for a motion to approve the Agenda.

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

Motion carried, 5 - 0.

IV. MINUTES

ACTION: Ms. Newsom moved and Ms. Roberts seconded the motion that the Panel approve the Minutes from the October 28, 2016 meeting.

Motion carried, 5 – 0.
V. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director, said, welcome and good morning Panel members, applicants, and stakeholders. Following the Panel meeting in October, we have a larger Panel meeting today with approximately $12.2M in projects with another $1.2M in Delegation Order for a total of just over $13.4M.

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

Regarding the Budget for Alternative Fuels and Vehicle Technology Program, $2M was approved through an Interagency Agreement in partnership with the California Energy Commission. We have approved two Proposals in the last few months for over $900,000; approximately $1M remaining for the year.

In regards to Core Funds for FY 2016/17, today the Panel will consider $12.2M in projects with an additional $1.2M approved by Delegation Order. Should the Panel approve all the projects today, ETP will have approximately $30M for the remainder of the FY 2016/17.

Under Delegation Order, all project proposals are capped at $100,000 to be approved by the Executive Director on a continuous flow basis, and as of today, 22 projects were approved totaling over $1.2M.

For FY 2016/17 program funding to date, we have approximately 549 projects submitted, with a value of just over $100M. If all the projects are approved today, the Panel will have approved 259 projects with a value of over $63M in proposals. Financially we are in good shape for the remainder of the FY.

In regards to the FY 2016/17 Fund Status Report, we have a few items that will take place this year; implementation of the Employment Training Management System (ETMS), and the relocation of our San Diego and Sacramento Regional Office.

Regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at $27M; $9M in allocation. Multiple Employer Contract (MEC) requests are at $10M; $9.5M in allocations. Small Business has $3M in demand; $2.9M in allocations. Critical Proposals are at $870,000 in demand; $6.4M in allocations. Apprenticeships are at $2.5M in demand; $1.2M in allocations. Overall demand is approximately $65M.

Regarding the number of projects remaining in the Regional Offices: Single Employers 93, MECs 27, Small Business 99, Critical Proposals 2, and Apprenticeships; total of 231. AAU by category: Single Employers 26, MECs 6, Small Business 24, Critical Proposals 0, and Apprenticeships 3; total of 59. 90% of the projects have been assigned to the Regional Office at this point.

Regarding legislation, there isn’t anything new to report this month.
Mr. Knox gave an update on the Employment Training Management System (ETMS). He said, we are making more enhancements on the Multiple Employer Contract system. We will wait until those enhancements take place before we preview with the stakeholders and contractors. We are looking at probably late January, before those changes take place. At that time, we will hold a forum.

VI. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

Mr. Knox asked for a motion to adopt Consent Calendar Items #1 through #10.

- Alhambra Hospital Medical Center L.P. ................................................................. $60,240
- California Association of Pest Control Advisers ................................................ $102,596
- California Plumbing & Mechanical Contractors Association ........................... $198,816
- College of Sequoias ......................................................................................... $152,876
- Hathaway Dinwiddie Construction Company ..................................................... $172,044
- Hyperloop Technologies, Inc. dba Hyperloop One ........................................... $239,540
- NIACC-Avitech Technologies Inc. ................................................................. $104,800
- Northern California Construction Training Inc. .............................................. $211,392
- Perrin Bernard Supowitz, Inc. dba Individual FoodService ........................... $151,680
- Syntrol Plumbing, Heating & Air, Inc. .......................................................... $195,990

ACTION: Ms. Newsom moved and Ms. Roberts seconded approval of Consent Calendar Items #1 through #10.

Motion carried, 5 – 0.

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

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

ACTION: Ms. Roberts moved and Ms. Newsom seconded the approval to delegate authority to the Executive Director in event of loss of quorum.

Motion carried, 5 – 0.

Mr. Broad recalled that a decade ago, Jack Stewart, former president of California Manufacturers Technology Association, came before the Panel. He brought up the issue on what happens to kids who are entering into the workforce, but are not bound for a four-year college: are we preparing them for jobs that they can do?

However, Mr. Broad said, due to budget cuts, we’ve seen vocational education eliminated. His comments convinced me that this was an issue of transcendent significance in our society. College education has been widely available since the end of the World War II in American society, but these cuts send a message to our youth that if you don’t go to college, there’s something wrong with you. This is a wrongful thinking, for us to make them feel that way.
Our General Counsel is going to present a new pilot program: Career Work Experience for At-Risk Youth. As well, newly-elected City of Sacramento Mayor Darrell Steinberg will be presenting an initiative that will give a choice of career path to students, other than college. The new pilot will be considered by the Panel for action.

VIII. REPORT OF THE GENERAL COUNSEL

Maureen Reilly, General Counsel presented the new pilot. Today, she said, the Panel will consider adopting a new program: Career Work Experience for At-Risk Youth (CWE). This action would support an education/workforce initiative to be implemented by the City of Sacramento under Mayor Darrell Steinberg, in cooperation with the Sacramento Employment and Training Agency (SETA), a joint-powers agency of the City and County.

As Mr. Broad mentioned, Mayor Steinberg will be speaking on an initiative that will provide vocational skills training to high school students in neighborhoods impacted by poverty, or crime and related issues. With this in mind, the ETP pilot program will be funded as Special Employment Training for Multiple Barriers (SET/MB).

CWE is distinct from the existing Ex-Offender/ At-Risk Youth program approved by the Panel in March 2008, in part because it will reach trainees as young as age 16. The goal of training is to assist students and other youth in a population that tends to have delayed entry into the job market. The trainees may still be students in the 11th or 12th grade, although they may also have dropped out of school, or graduated without employable skills.

CWE is authorized only for a Multiple Employer Contractor (MEC), and Trainees under age 18 would be required to obtain a State of California work permit issued by the Department of Education (DOE) through the high school, consistent with Education Code requirements. Training will take place during the summer months between the junior and senior year of high school, and part-time throughout the school year.

The Panel had no questions.

XI. Mayor Darrell Steinberg

Mayor Steinberg said, in government, there is a tendency to be cautious, and understandably so. I would like to thank Mr. Knox, Mr. Broad, Mr. Meyer, Ms. Reilly and all the members of the Panel for their commitment to this set of issues, and for working with us closely over the last several months to make this pilot a reality.

This is my third day on the job; two nights ago, I stood before the people of the City of Sacramento and made a citywide commitment to connecting public education to our modern workforce. I can’t think of a better action item to launch during my first week in office.

Previously, I served as President of State Senate, and I was appointed to lead the Career Pathways Trust. The idea was to redesign high schools to ensure that students have access to both high-level curriculum, and real workforce experience. College and career are not mutually exclusive; everyone should have the opportunity to go to college, but we also need
to recognize that there should be real opportunities for those who don’t go straight to a four-year college. The state has invested $500M, and that money is at work here.

I laid out an ambitious proposal that within four years, we would commit to assure that at least half of Sacramento high school juniors and seniors have access to year-round paid work-experience in neighborhoods where children are underserved. I’m here before you today, to ask you to join me in lighting that initial spark to help connect our At-Risk Youth to paid work and learn opportunities to serve our community.

Fundamentally, remediation is vital, and preventing dropouts, unemployment and under-employment is important for At-Risk Youth. We can never lessen our commitment to those who are 18 to 24 years old, or who have dropped out of school, and don’t have a clear pathway. If we move our workforce development upstream, as early as high school, age 16 to 17, we can prevent setbacks that so many kids have to deal with. We can prevent failure, and prepare our youth at an early age to understand employers’ expectations.

The proposed program is designed to provide 500 students in Sacramento with two months of training, during the summer months between their junior and senior years. With the resources and employer-base that we have in Sacramento, approximately 350 students would be guaranteed internship placement for at least 10 hours a week in their senior year. That job experience will help those students know better what they want to do when they graduate high school, and may eventually lead to full-time employment.

During my time as Senate President, I took a Senate Delegation to Switzerland; we have a lot to learn from the European model. Their kids have the ability to shift back and forth between college and career pathways. They have a robust connection between their private and public industries. The industries actually help write some of the curriculum in high school. Culturally, in this country, that’s not the way we do it.

Here, public education is separate from the employment training system, which is separate from the business community. I’m not saying that we need to be like Switzerland, but the idea of connecting our high school students, with modern workforce, creates pathways with workforce experience, which puts money in the pockets of kids.

Mayor Steinberg then introduced industry representatives in the audience from: SETA, Sacramento Central Labor Council, Sacramento-Sierra Building Trades Council, IBEW Apprenticeship Program, Kaiser Permanente, North State Building Industry Association, Sacramento Metro Chamber Foundation, and Sacramento Municipal Utilities District.

Mr. Broad said, Sacramento is an ideal place to launch the pilot because it brings together State, City, and County government in one location. I’m happy to go with the Mayor, and find employers who are willing to commit to hiring these students. The link that’s always been most difficult in this issue is you have to have an employer that’s willing to make a commitment to a kid - and maybe a troubled kid - that there is a job, a paid job waiting for you, if you stay in school, and dedicate yourself to do this training. Employees are reticent to do that in this society.
Each one of the 500 students will have to be retained by the employers for a retention period required by law in order to qualify for reimbursement of training costs; that’s what makes this program different. Finding an employer willing to make a commitment to these students will be challenging.

Mayor Steinberg said, we know that the ETP funds are for private sector, but we want to engage our public sector in this campaign as well. John Brauer, California Labor Federation, will work very closely with our school districts.

Panel member Jan Roberts spoke next. She said, together with PepsiCo, Kraft, and Gallo, ETP has approached many high schools in the Central Valley, and tried to recruit them. But we had a difficult time, because the kids couldn’t pass the drug test, or meet other minimum qualifications. Many of the students and young adults have challenging barriers; we want these people to come into our workforce; they just won’t qualify because of drug abuse and other barriers. We’re talking about lifetime careers that pay well, and there is room for advancement. We want to bring the students in; we want fresh ideas in our companies.

Mayor Steinberg said, this is really an important point. This project, both what we’re doing here today, and what I want to do citywide with the paid internship, is a way for us to have a broader conversation and an agenda that links public education and the workforce.

Panel Member Sonia Fernandez said, I just want to commend you and all of your partners on this program. I was one of those kids that had no clear pathway to college. I learned vocational training through the Marine Corps; they provided me with the skills that I need to be able to contribute to a job, which ultimately led me to two college degrees. It’s really important to have these types of programs, because they do make a difference. Most of us don’t have the example that can lead us to college or a career, so this is vital, especially where you have a lot of immigrants, and a lot of people that don’t know what’s going to come next when they finish school, or don’t have anyone encouraging them. I am really proud and excited to see this before the Panel.

Panel member Gretchen Newsom also spoke. She said, I’m excited to see this new pilot program before the Panel. I want to commend you on engaging the different employers that can have a big impact in our community through a program like this; well done.

Mr. Broad said, I would like to make a motion that we approve the concept and guidelines of the program. In the next several months, we will have to present a formal proposal that we can vote on to appropriate the money for this project.

ACTION: Mr. Broad moved and Ms. Roberts seconded approval to adopt the pilot program, Career Work Experience for At-Risk Youth.

Motion carried, 5 – 0.
X. REVIEW AND ACTION ON PROPOSALS

Consent Calendar

Sherwin-Williams Company

Diana Torres, Manager of the San Diego Regional Office, presented a Proposal for Sherwin Williams Company (Sherwin-Williams) in the amount of $204,768. Sherwin-Williams launched in 1866 with the development of ready-mixed paint. Headquartered in Ohio, the Company remains tightly vertically integrated, although it has grown to include many divisions for development, manufacturing and distribution.

Ms. Torres said, there is a correction on Page 6 of 6; the development fee is $14,333.

Ms. Torres introduced Andrew Bernat, Tax Counsel, and Megan Bagley, ADP.

Ms. Roberts said, I'm glad that you are taking advantage of the other programs through Go-Biz.

ACTION: Ms. Roberts moved and Ms. Fernandez seconded approval of the proposal for Sherwin Williams Company in the amount of $204,768.

Motion carried, 5 – 0.

Single Employer Proposals

AHMC Garfield Medical Center, LP dba Garfield Medical Center

Ms. Torres presented a Proposal for AHMC Garfield Medical Center, LP dba Garfield Medical Center (Garfield Medical) in the amount of $561,650. Garfield Medical, located in Monterey Park, is a 210-bed acute care facility that has been serving the needs of the San Gabriel Valley since 1933. Garfield Medical is a for-profit hospital accredited by The Joint Commission for specialized medical services. The Hospital is eligible for ETP funding under Special Employment Training (SET) for frontline workers, and qualifies for priority industry reimbursement as a healthcare employer.

Ms. Torres introduced Karen Lee, Nurse Director.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for AHMC Garfield Medical Center, LP dba Garfield Medical Center in the amount of $561,650.

Motion carried, 5 – 0.
Edmunds.com, Inc.

Ms. Torres presented a Proposal for Edmunds.com, Inc. (Edmunds.com) in the amount of $409,600. Founded in 1966, Edmunds.com is a technology company that developed and operates an online automotive information website (www.edmunds.com) to assist customers with car pricing, car reviews, and other research tools. Edmunds.com is a comprehensive platform that provides customers with instant, upfront pricing information for cars and trucks for sale at more than 10,000 dealer franchises featured on the website.

Ms. Torres introduced Evvy Mankowitz, Treasurer and Accounting, and Lance Wilcox, Curriculum Manager.

Ms. Roberts asked, who will be looking over the day-to-day administration portion of this proposal? I want to see you succeed; do you have anybody else internally that will be helping you with this project? Mr. Wilcox said I’m the developer of the curriculum for Edmunds.com. We have a six person training team, and we will be maintaining our training records, in addition to delivering the training.

Ms. Robert said, that’s what I wanted to hear, and I’m glad to hear that you have the experience behind you to support this contract. This is a great proposal.

ACTION: Ms. Roberts moved and Ms. Newsom seconded the approval of the proposal for Edmunds.com, Inc. in the amount of $409,600.

Motion carried, 5 – 0.

HOB Entertainment, LLC

Ms. Torres presented a Proposal for HOB Entertainment, LLC (House of Blues) in the amount of $394,870. Founded in 1992, House of Blues is a live entertainment and restaurant company. The House of Blues grew out of founder Isaac Tigrett's love for the unique American art form known as "the Blues." House of Blues is home to live music, original folk art, and delta-inspired cuisine. The Company’s venues combine restaurant, nightclub and private-event services. House of Blues has two venues located in California (Anaheim and San Diego), with an additional 9 locations nationwide. The Company’s headquarters is located in Los Angeles. Training will include employees from all three locations.

Ms. Torres introduced Shawn Imitates Dog, Vice President, Human Resources.

Ms. Newsom said, I commend you on the veteran initiative that you are undertaking. The project detail says: “Training in this proposal will focus on implementing Workday, a cloud-based enterprise software that unifies a wide range of nature functionality into a single system”. It seems like the true benefit is to your company, House of Blues, rather than to the worker receiving the training. I’d like you to elaborate a little more on how this will benefit the worker, as opposed to just making sure that they are implementing a new HR system for you.

Mr. Dog said, Workday is not only an HR system that stores all the staff data. There’s a lot of data reporting functions that allows our managers to cut down time when requesting for
reports from HR, payroll, or finance to help run their business. A lot of the operations, financing, budgeting, and other tools can help them access the data at their fingertips, versus putting in a request.

**ACTION:** Ms. Roberts moved and Ms. Fernandez seconded approval of the proposal for HOB Entertainment, LLC in the amount of $394,870.

Motion carried, 5 – 0.

**Lancaster Hospital Corporation dba Palmdale Regional Medical Center**

Ms. Torres presented a Proposal for Lancaster Hospital Corporation dba Palmdale Regional Medical Center (PRMC) in the amount of $465,700. Founded in 1970, PRMC is a 157-bed acute care hospital owned and operated by Universal Health Services (UHS). This will be PRMC’s third ETP Agreement within the last five years.

Ms. Torres introduced Christine Williams, MSN, Nurse Educator.

Ms. Roberts said, you have a good performance record.

**ACTION:** Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for Lancaster Hospital Corporation dba Palmdale Regional Medical Center in the amount of $465,700.

Motion carried, 5 – 0.

**Live Nation Worldwide, Inc.**

Ms. Torres presented a Proposal for Live Nation Worldwide, Inc. (LNW) in the amount of $270,000. Founded in 2010 and headquartered in Beverly Hills, LNW, a subsidiary of Live Nation Entertainment, Inc., is the leader in live entertainment and E-Commerce. As an event management company, LNW operates venues worldwide and is responsible for concert promotions for various artists. Training in this proposal will take place at 10 LNW locations (2 in Beverly Hills, 3 in Hollywood, 1 in San Diego and 4 in San Francisco). This will be LNW’s second ETP Agreement.

Ms. Torres introduced Liz Dyer, Director of Organization and Talent Development.

Ms. Roberts asked, is LNW affiliated with House of Blues? Ms. Dyer said, House of Blues is a subsidiary of LNW, but we function separately.

Mr. Broad said, I just want to make sure that we are not funding multiple trainings for the same company. Ms. Torres said, I made sure that they are not using the same representative for the presentation; they are completely separate.

Ms. Fernandez asked, what level of commitment do you have from your leadership in order to obtain a higher performance rate on this proposal; have you made any changes? Ms. Dyer said, we have a new leadership team, and we have a huge amount of leadership support.
Ms. Roberts asked, will you be conducting the training in one location, or are you doing all the training in five locations? Ms. Dyer said, all locations listed.

Ms. Roberts asked, will you be appointing a person that will be in charge of the project? Ms. Dyer said, we have a training network.

There were no further questions from the Panel.

**ACTION:** Ms. Roberts moved and Ms. Fernandez seconded approval of the proposal for live nation worldwide, Inc. in the amount of $270,000.

Motion carried, 5 – 0.

**Yahoo! Inc.**

Ms. Torres presented a Proposal for Yahoo! Inc. (Yahoo) in the amount of $744,976. Yahoo is a global Internet brand that has changed the way people communicate, access, share and create information. This will be Yahoo’s fourth ETP Agreement within the last five years.

Ms. Torres introduced Linda Blank, Senior Manager, Global Operations, and Michael Hyatt-Evenson, Senior Director.

There were no questions from the Panel.

**ACTION:** Ms. Roberts moved and Ms. Fernandez seconded approval of the proposal for Yahoo! Inc. in the amount of $744,976.

Motion carried, 5 – 0.

**AHMC Anaheim Regional Medical Center, LP**

Ms. Torres presented a Proposal for AHMC Anaheim Regional Medical Center, LP (Anaheim Regional) in the amount of $314,080. Anaheim Regional was acquired by AHMC Healthcare, Inc. in 2004 along with six hospitals to form the current AHMC Corporation. AHMC Healthcare has six hospitals in Southern California (cities of Anaheim, Whittier, San Gabriel Valley, Garfield, Monterey and El Monte). Each hospital operates autonomously. This proposal is only for Anaheim Regional. This is the fourth ETP Agreement between AHMC and ETP; the fourth in the last five years.

Ms. Torres introduced Lee Passow, RN, MSN.

Ms. Newsom said, your sister hospital, AHMC Garfield Medical Center, is represented by SEIU. I noted that you’re not represented by any labor union. Ms. Passow said, we are in Orange County, and we’re operating separately from them.

Ms. Newsom said, the significant decrease in the amount that you pay your RNs is disappointing.
ACTION: Ms. Roberts moved and Ms. Fernandez seconded approval of the proposal for AHMC Anaheim Regional Medical Center, LP in the amount of $314,080.

Motion carried, 5 – 0.

Altman Specialty Plants, Inc.

Ms. Torres presented a Proposal for Altman Specialty Plants, Inc. (Altman) in the amount of $300,754. Founded in 1975 and headquartered in San Diego, Altman is a wholesale nursery. The Company provides a broad assortment of plants, flowers, shrubs, and other botanical products to retail nurseries, home and garden centers, and other stores throughout the southwest and western U.S. Altman operates growing centers in Vista, Salinas, and Perris which will participate in training.

During the August Panel meeting, the Panel was concerned about overtime compensation for those occupations that are considered Agricultural occupations (Production Staff). Altman states that it complies with current law in compensating its non-exempt employees for the hours they work. Specifically, certain agricultural employees (for example those who work in the fields) work under Industrial Welfare Commission (IWC) Wage Order No. 14. These employees are paid overtime for work in excess of 10 hours in a workday or 60 hours in a work week. Other agricultural employees performing different tasks such as preparing products for market (for example those employees who load trucks for delivery) work under Wage Order No. 13. Those employees are paid overtime for work in excess of 8 hours in a work day and 40 hours in a work week.

Mr. Broad said. I believe that statement is only true for the remaining days of December 2016. The new state law requires that agricultural workers have to be paid overtime consistent with the way everybody is paid, which is after eight hours a day, 40 hours a week.

Mr. Prows, General Counsel and V.P. of Human Resources, said, it's a phased-in approach, and it will eventually get to that point. Mr. Broad said, I just want to make sure that we're clear on that matter. Ms. Torres said, Altman has stated that they will go by what the law requires.

Ms. Fernandez asked, were the trainees that were removed from the previous proposal a part of the previous agreement? Mr. Prows said, yes; they might have received training from the previous agreement, and some of them might receive training for this current proposal, but it wouldn’t be reimbursed.

Ms. Fernandez asked, is there a career pathway for the 243 trainees to promote to a higher wage, even though we’re not reimbursing for their training? Mr. Prows said, yes; those are entry level production jobs. They have the opportunity to advance and promote all the way up to lead supervisors. We have many long-term employees that have moved up. Ms. Fernandez said, thank you.

Ms. Newsom asked, pertaining to the new overtime rules and regulations that will eventually go into effect, what is your course of plan? Mr. Prows said, the phase-in starts in January 2019. Ms. Newsom said, the phase-in starts in January 2019, and it’s finalized in 2022.
What is your plan; what will be your pay structure? Mr. Prows said, we’ll pay them according to the hours that they worked; according to their work schedule. If they work 60 hours in a week in 2019, they will receive five hours of overtime, and as that phases down to 40 hours in a workweek, we will pay them accordingly.

Ms. Newsom asked, will you pay them above and beyond what’s required by law? Mr. Prows said, at this point, we’re not; but we treat them fairly, we pay overtime as warranted to get our work accomplished.

Ms. Robert said, I do appreciate you coming back and making all the adjustments. I know that you were bombarded with multiple questions from the previous Panel meeting. We appreciate you coming back, and removing those employees that were not eligible. Mr. Prows said, thank you.

ACTION: Ms. Roberts moved and Mr. Broad seconded approval of the proposal for Altman Specialty Plants, Inc. in the amount of $300,754.

Motion carried, 3 – 1 – 1
(Roll Call Vote: Barry Broad – yes; Diane Banchero – yes; Sonia Fernandez – abstain; Gretchen Newsom – no; Janice Roberts – yes)

HUB International Insurance Services Inc.

Ms. Torres presented a Proposal for HUB International Insurance Services Inc. (HUB) in the amount of $295,310. Founded in 1998, HUB is a full-service insurance brokerage company that provides commercial insurance, personal insurance, employee benefits insurance and individual life, disability and Medicare insurance services for direct consumers and businesses. The Company also provides risk consulting and compensation consulting services to small and large employers. HUB’s “niche” is the mid-sized employer business segment of the marketplace.

Ms. Torres introduced Kathy Quintana, Chief Operating Officer.

Ms. Roberts asked, who are some of your competitors in the market? Ms. Quintana, said Marsh, A One, Leavitt, Lockton, those are part of the top 10. We’re about the 8th largest broker in the U.S.

There were no further questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Fernandez seconded approval of the Proposal for HUB International Insurance Services Inc. in the amount of $295,310.

Motion carried, 5 – 0.
Thales Avionics, Inc.

Ms. Torres presented a Proposal for Thales Avionics, Inc. (Thales Avionics) in the amount of $269,000. Founded in 2009, Thales Avionics is a manufacturer of interactive in-flight entertainment (IFE) and connectivity systems for the airline industry such as Airbus and Boeing. The Company’s brand, InFlyt Experience is installed in a variety of aircraft such as those operated by Airbus and Boeing. Thales Avionics offers a wide range of cabin systems designed to make flying a more enjoyable experience for passengers and crew before, during, and after flight. It delivers comprehensive solutions customized for each aircraft.

Ms. Torres introduced Capucine Deghaye, Director.

Ms. Fernandez asked, have you considered adding a veteran component to your organization? Ms. Deghaye said, we currently don’t have that, but it’s something that we are looking into. Ms. Fernandez said, thank you.

There were no further questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for Thales Avionics, Inc. in the amount of $269,000.

Motion carried, 5 – 0.

UHS Corona, Inc. dba Corona Regional Medical Center

Ms. Torres presented a Proposal for UHS Corona, Inc. dba Corona Regional Medical Center (Corona Regional) in the amount of $347,004. Corona Regional is owned by Universal Health Services, Inc. (UHS). UHS is a healthcare management company that operates behavioral health facilities, acute care hospitals, and ambulatory surgery and radiation centers nationwide. UHS owns and operates five Southern California hospitals in the cities of Corona, Palmdale, Murrieta, Wildomar, and Temecula. Each hospital operates autonomously.

Ms. Torres introduced Mitchell Winnik, COO, and Tracy Kasten, Director of Education.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Fernandez seconded approval of the Proposal for UHS Corona, Inc. dba Corona Regional Medical Center in the amount of $347,004.

Motion carried, 5 – 0.
Mass Precision, Inc.

Anna Nastari, Manager of the Foster City Regional Office, presented a Proposal for Mass Precision, Inc. (Mass Precision) in the amount of $345,170. Founded in 1984, Mass Precision provides custom manufacturing of enclosures, racks, shelves, hardware components, electronic chassis, frames, fabrications and electro-mechanical assemblies built to customer specifications. The Company also provides a full range of services including: design and engineering, precision machining, painting and metal finishing, as well as a system of logistics to control complex component procurement.

Ms. Nastari introduced Will Jones, CFO and Michael Chissel, Training Coordinator.

Ms. Roberts said, thank you for your passion around your employees, I think that’s a great trait to have.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for Mass Precision, Inc. in the amount of $345,170.

Motion carried, 5 – 0.

Samsung Semiconductor, Inc.

Ms. Nastari presented a Proposal for Samsung Semiconductor, Inc. (SSI) in the amount of $339,024. SSI a subsidiary of Samsung Electronics Co. Ltd. headquartered in San Jose, develops new technology for Device Solutions through its Research and Development (R&D) Labs with input from its Sales and Marketing teams.

Ms. Nastari introduced Ricardo Samaniego, Tax Director.

Ms. Roberts asked, what happened to your previous agreement? Mr. Samaniego said, back then, it was like herding cats. Most of our employees are engineers; highly educated, but it’s difficult to manage them. We ended up hiring somebody to help with the administrative portion, and we finally got it figured out. So we’re starting anew; we know that we have the support of management, and we’re moving forward.

Ms. Roberts asked, I know that this proposal was right-sized, but do you have anybody else helping you with the administrative portion of this proposal? Mr. Samaniego said, we started late on our previous contract, and we had some turnover with our two HR departments. We figured out the process, and educated our engineers as they came in. As part of their new hire orientation package, they are trained on how to fill out their training hours; it’s part of the requirement. We now have an individual who is dedicated to this training portion.

Ms. Fernandez asked, what is the level of commitment from your leadership in order to ensure the success of this agreement? Mr. Samaniego said, our engineers understand the importance of training, and we have the support of our management. From the last quarter, we had the highest training hours performed, but they were not recorded, and we can’t bill for training hours that are not recorded.
Ms. Fernandez asked, is there an increase on the training hours for the engineers? Mr. Samaniego said, yes; and two-thirds of the training are for the engineers.

Mr. Broad said, we want you to earn all the money, but it sounds like your engineers are resistant to training. Mr. Samaniego said, two-thirds of our engineers have PhD’s; it’s a different problem set. I’m willing to put myself on the line; I’m an ambassador for the state of California. I believe that training is important, and we are training our engineers to keep track of their training hours. We have the management’s full support on this, and we are confident that we can complete this training.

Ms. Roberts asked, do you have an LMS? Mr. Samaniego said, we are moving away from paper statements; we are now using identification badges to track our training.

Ms. Roberts said, the next time you come before the Panel, bring the right people with you; and I would suggest that you pre-fill out the rosters ahead of time, so all the engineers have to do is sign their paperwork. We love to see companies like yours come before the Panel. If you need help, please contact our staff. Mr. Samaniego said, the staff of ETP has been very helpful.

ACTION: Ms. Roberts moved and Mr. Broad seconded approval of the proposal for Samsung Semiconductor, Inc. in the amount of $339,024.

Motion carried, 5 – 0.

Space Systems/Loral, LLC

Ms. Nastari presented a Proposal for Space Systems/Loral, LLC (SSL) in the amount of $470,000. SSL is a subsidiary of SSL MDA Holdings. SSL designs, manufactures, and tests sophisticated communication satellites, payloads, and subsystems at their facility in Palo Alto. This will be the third ETP Agreement between ETP and SSL.


Ms. Roberts said, you did a great job on your last contract.

ACTION: Ms. Roberts moved and Ms. Fernandez seconded approval of the proposal for Space Systems/Loral, LLC in the amount of $470,000.

Motion carried, 5 – 0.

Viavi Solutions, Inc.

Ms. Nastari presented a Proposal for Viavi Solutions, Inc. (Viavi) in the amount of $363,450. Viavi manufactures optical technologies and network & service enablement products. The Company helps service providers and IT organizations optimize and maintain many of the world’s largest and most complex networks. The Company’s Optical Security and Performance (OSP) segment concerns the management of light.
Ms. Nastari introduced Petra Nagel, Senior Vice President of Human Resources, and Kathy Stafford, Human Resources Director.
There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for Viavi Solutions, Inc. in the amount of $363,450.

Motion carried, 5 – 0.

A. Teichert & Son, Inc.

Willie Atkinson, Manager of the Sacramento Regional Office, presented a Proposal for A. Teichert & Son, Inc. (Teichert) in the amount of $355,680. Founded in 1887 and headquartered in Sacramento, Teichert is a construction company that builds infrastructure such as freeways, commercial and industrial site work, parks, and airports. Services include grading, asphalt paving, concrete curbs and sidewalks, underground pipelines and joint utility installations. Additionally, Teichert produces construction materials such as aggregate rocks, sand, gravel, asphaltic concrete and ready-mixed concrete. Teichert has facilities in Alameda, El Dorado, Fresno, Nevada, Placer, Sacramento, San Joaquin, Sutter, Yolo and Yuba counties, all of which will participate in the training proposal.

Mr. Atkinson introduced Mark Ingram, VP Strategic Services, and Steve Duscha, Consultant.

Ms. Newsom said, it states in your proposal that up to $7.00 per hour maybe used to meet the Post-Retention Wage; that seems high. Can you please elaborate further? Mr. Ingram said, we are proud of the fact that we pay high wages, and maintain a very robust health insurance; it comes with a cost.

There were no further questions from the Panel.

ACTION: Ms. Fernandez moved and Ms. Roberts seconded approval of the proposal for A. Teichert & Son, Inc. in the amount of $355,680.

Motion carried, 5 – 0.

CIGNA Health and Life Insurance Company

Mr. Atkinson presented a Proposal for CIGNA Health and Life Insurance Company (CIGNA) in the amount of $304,500. Founded in 1982, CIGNA is a global health service company dedicated to helping people improve their health, well-being and sense of security.

Mr. Atkinson introduced Terry Hansen, Consultant, and Pam Riley, Business Manager.

There were no questions from the Panel.
ACTION: Ms. Roberts moved, and Ms. Newsom seconded approval of the proposal for CIGNA Health and Life Insurance Company in the amount of $304,500.

Motion carried, 5 – 0.

DNC Parks & Resorts at Tenaya, Inc. dba Tenaya Lodge at Yosemite

Mr. Atkinson presented a Proposal for DNC Parks & Resorts at Tenaya, Inc. dba Tenaya Lodge at Yosemite (Tenaya Lodge) in the amount of $390,000. Founded in 1990, Tenaya Lodge is a year round destination resort located two miles from the Yosemite National Park. Tenaya Lodge is one of the largest employers in Mariposa County with 302 rooms, cottages, restaurants, fitness center and spa treatment rooms. The Resort has two other lodges in the Sequoia National Park and Kings Canyon National. The fourth location is the Tenaya Fresno Office with 15 sales and marketing employees. The Company provides hospitality services to guests from all over the world that visit the national parks. All four locations will participate in training.

Mr. Atkinson introduced Wendy Burke, Director of Human Resources, and Steven Benson, Training Consultant.

ACTION: Ms. Roberts moved and Ms. Fernandez seconded approval of the proposal for DNC Parks & Resorts at Tenaya, Inc. dba Tenaya Lodge at Yosemite in the amount of $390,000.

Motion carried, 5 – 0.

JLS Environmental Services, Inc.

Mr. Atkinson presented a Proposal for JLS Environmental Services, Inc. (JLS) in the amount of $248,180. Founded in 2002 and located in Loomis, JLS 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 their satellite location in Madera.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for JLS Environmental Services, Inc. in the amount of $248,180.

Motion carried, 5 – 0.

Pacific Coast Companies, Inc.

Mr. Atkinson presented a Proposal for Pacific Coast Companies, Inc. (Pacific Coast) in the amount of $749,264. Founded in 1953 and headquartered in Rancho Cordova, Pacific Coast provides business services and support to a “family” of closely affiliated companies. Services include accounting and internal audit, environmental consulting, human resources, finance,
information technology, marketing & advertising, risk management, legal services, tax and treasury management.

Mr. Atkinson introduced Dale Waldschmitt, Chief Financial Officer.

There were no questions from the Panel.

ACTION: Ms. Fernandez moved and Ms. Roberts seconded approval of the proposal for Pacific Coast Companies, Inc. in the amount of $749,264.

Motion carried, 5 – 0.

The Dow Chemical Company

Mr. Atkinson presented a Proposal for The Dow Chemical Company (Dow) in the amount of $296,800. Founded in 1897 and headquartered in Midland, MI, Dow manufactures and sells chemicals and plastics used by the agricultural and pest control industries. Dow also produces food, pharmaceuticals, paints, packaging, and personal care products. This will be Dow’s sixth ETP Agreement, the second in the past five years. Dow has California facilities in Pittsburg, Torrence, Tracy, Rancho Cucamonga, San Diego, and Contra Costa. Only the Contra Costa facility will participate in training.

Mr. Atkinson introduced Ivan Elizondo, Site Training Coordinator.

Ms. Roberts asked, do you have any experience working with ETP? Mr. Elizondo said, I’m new to the department. Ms. Roberts said, please ask our staff if you need help; we want you to succeed.

There were no further comments or questions from the Panel.

ACTION: Ms. Newsom moved and Ms. Roberts seconded approval of the proposal for The Dow Chemical Company in the amount of $296,800.

Motion carried, 5 – 0.

Multiple Employer Proposals

Laborers Training and Retraining Trust Fund for Southern California

Ms. Torres presented a Proposal for Laborers Training and Retraining Trust Fund for Southern California (SoCal Laborers) in the amount of $538,505. Founded in 1970, SoCal Laborers funds training for three separate Apprenticeship Programs, two of which will participate in this proposal: 1) Laborers Southern California JAC and 2) Southern California Laborers Landscape and Irrigation Fitters JAC. SoCal Laborers serves eight Southern California Locals (89, 220, 300, 585, 652, 783, 1309, and 1184) in 12 counties.
Ms. Torres introduced Martin dela Cruz, Marketing and Special Operations Managers, and Jan Borunda, Consultant.

There were no questions from the Panel.

**ACTION:** Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for Laborers Training and Retraining Trust Fund for Southern California in the amount of $538,505.

Motion carried, 5 – 0.

**Southwest Carpenters Training Fund**

Ms. Torres presented a Proposal for Southwest Carpenters Training Fund (SWCTF) in the amount of $949,310. SWCTF provides multi-site training for Journeymen and Apprentices in various carpentry fields throughout Southern California and five other states (Arizona, Nevada, Utah, New Mexico and Colorado).

Ms. Torres introduced Jamie Robison, Educational Services Coordinator.

Ms. Roberts asked, is this your first application? Ms. Robison said, no; we had one prior to this; this is our second application. The first one had a steep learning curve, but we managed to make it through.

There were no further questions from the Panel.

**ACTION:** Ms. Fernandez moved and Ms. Roberts seconded approval of the proposal for Southwest Carpenters Training Fund in the amount of $949,310.

Motion carried, 5 – 0.

**Joint Apprenticeship and Training Committee of the Plumbing and Pipe Fitting Industry of San Mateo County**

Ms. Nastari presented a Proposal for Joint Apprenticeship and Training Committee of the Plumbing and Pipe Fitting Industry of San Mateo County (Plumbers JATC San Mateo) in the amount of $409,176. For over 100 years, Plumbers JATC San Mateo have provided qualified workers in the plumbing, pipefitting and HVAC (heating, ventilation and air-conditioning) trades throughout San Mateo County. This will be the second ETP Agreement for Plumbers JATC San Mateo.

Ms. Nastari introduced Bob Kay, Training Director, and Jan Borunda, Consultant.

**ACTION:** Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for Joint Apprenticeship and Training Committee of the Plumbing and Pipe Fitting Industry of San Mateo County in the amount of $409,176.

Motion carried, 5 – 0.
California Tooling and Machining Apprenticeship Association

Mr. Atkinson presented a Proposal for California Tooling and Machining Apprenticeship Association (CTMAA) in the amount of $86,086. CTMAA began operations 23 years ago as a chapter of the National Tooling & Machining Association. 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 the second ETP Agreement with CTMAA.

Mr. Atkinson said, there’s a correction on Page 1 of 6; this proposal does not have Union participation.

Mr. Broad said, so this is a non-Union apprenticeship program. Dick Herman, Secretary of Board, said that is correct.

Ms. Roberts asked, you are requesting for a small amount. Mr. Herman said, this is a machinist apprenticeship program, and I think some of the Panel members are aware. It’s an extra ordinary intense program, and finding people with skills and capabilities is difficult to do. I’m delighted to hear about the new pilot program that the Panel approved earlier. Our biggest challenge is finding young individuals who are motivated.

ACTION: Ms. Roberts moved and Ms. Fernandez seconded approval of the proposal for California Tooling and Machining Apprenticeship Association in the amount of $86,086.

Motion carried, 5 – 0.

Central Valley Mother Lode Plumbers, Pipe & Refrigeration Fitters Joint Apprenticeship Training Committee

Mr. Atkinson presented a Proposal for Central Valley Mother Lode Plumbers, Pipe & Refrigeration Fitters Joint Apprenticeship Training Committee (Central Valley JATC) in the amount of $208,820. Central Valley JATC was established in 1955. In 1997, Local 492 (Stockton) and Local 437 (Modesto) merged with it to create the Plumbers, Pipe and Refrigeration Fitters Local Union 442. The JATC is funded by signatory employers pursuant to collective bargaining. As usual, the JATC consists of equal representatives from labor and employers.

Mr. Atkinson introduced Greg Vincelet, Training Coordinator, and Kelly Greer.

Ms. Roberts said, it states in the proposal that your performance rate is 35%; can you please clarify? Ms. Greer said, yes; but after our final billing, it will be 75%. Mr. Broad asked, are you earning money for trainees who dropped out? Mr. Vincelet said, that is our retention number. We are from Modesto, and that area hasn’t taken off. Our apprentices are having a difficult time meeting the retention; we’ve extended the contract to meet the retention.
ACTION: Ms. Roberts moved and Ms. Fernandez seconded approval of the proposal for Central Valley Mother Lode Plumbers, Pipe & Refrigeration Fitters Joint Apprenticeship Training Committee (Central Valley JATC) in the amount of $208,820.

Motion carried, 5 – 0.

XI. PUBLIC COMMENTS

There were no public comments.

XII. MEETING ADJOURNMENT

Mr. Broad adjourned the meeting at 12:33 PM.
Single Employer Contractor

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

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

These features apply to core program funding.
Multiple Employer Contractor

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

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

Retraining

- Training hours for retrainees are capped at 200. The Panel may modify this cap for good cause on a case-by-case basis.
- The MEC must provide union letters of support for represented employees.
- The MEC must make an “in kind” contribution toward the cost of training, of at least 50% of the ETP-funded amount. These contributions may consist of:
  1) wages/benefits paid during training by participating employers;
  2) development, recruitment, placement, and assessment costs; and,
  3) facility and material expenses.
- The MEC must provide a list of participating employers to demonstrate actual employer demand for the occupational skills in the curriculum.
- The MEC must have a core group of participating employers for at least 80% of the training plan.
- Participating employers must be subject to the Employment Training Tax.
- Participating employers must demonstrate an ongoing commitment to training, and represent that ETP funds will not displace existing resources.

New Hire Training

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

These features apply to core program funding.

August 20, 2015
Delegation Order Process

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

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

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

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

Training Proposal for:

California Expanded Metal Products Company dba CEMCO

Agreement Number: ET17-0427

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Reeves

PROJECT PROFILE

<table>
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<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Job Creation Initiative</th>
<th>Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
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<td></td>
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<td>Priority Industry:</td>
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<table>
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<tr>
<th>Counties Served:</th>
<th>Contra Costa, Los Angeles</th>
<th>Repeat Contractor:</th>
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<tbody>
<tr>
<td>Union(s):</td>
<td>☐ Yes ☑ No</td>
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Number of Employees in:
- CA: 353
- U.S.: 554
- Worldwide: 554

Turnover Rate: 16%

Managers/Supervisors (% of total trainees): 9%

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs (-)</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
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<tbody>
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<td>$233,000</td>
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<td>$233,000</td>
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In-Kind Contribution: 100% of Total ETP Funding Required $246,195
## TRAINING PLAN TABLE

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<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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<td>Weighted Avg: 50</td>
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<td></td>
<td>Weighted Avg: 50</td>
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*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:** $17.63 per hour for Contra Costa County and $16.96 per hour for Los Angeles County.
- **Job Number 2 (Job Creation):** $14.69 per hour for Contra Costa County and $14.13 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 $3.63 per hour (Job Number 1) and $3.19 per hour (Job Number 2) may be used to meet the Post-Retention Wage.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
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<tr>
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<td>21</td>
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<tr>
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<tr>
<td>Manager</td>
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<td>150</td>
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<td>Sales/Marketing Staff</td>
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<tr>
<td><strong>Job Number 2 (Job Creation)</strong></td>
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<td></td>
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<tr>
<td>Administration Staff</td>
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<td>2</td>
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</tbody>
</table>
INTRODUCTION

Founded in 1974, California Expanded Metal Products Company dba CEMCO (CEMCO) (www.cemcosteel.com) is recognized as one of the largest manufacturers of steel framing and metal lath systems in the United States. CEMCO offers a broad product line of cold-formed steel frames for both commercial and residential construction.

With over 60 state-of-the-art roll formers, using only mill-certified prime steel, CEMCO is equipped to handle small and large construction projects. CEMCO products are distributed throughout the United States, Canada, Mexico, and the Pacific Rim. The Company qualifies for standard retraining under the out-of-state competition provisions as a manufacturer and is eligible for priority industry reimbursement.

CEMCO is headquartered in the City of Industry and also operates a manufacturing facility in Pittsburg. CEMCO also has manufacturing facilities in Colorado and Texas.

PROJECT DETAILS

CEMCO is in the process of making several business improvements to enhance efficiencies in production, purchasing, inventory management, and pricing. Specific improvements include upgrading its Enterprise Resource Planning (ERP) system, improving its Human Capital Management (HCM) system, and increasing the technical knowledge and skills of its workforce. The Company estimates that its investment in new ERP and HCM technology will cost approximately $500,000 over the next two years.

CEMCO’s ongoing transition to a paperless environment requires employees to rely more heavily on technology, teamwork, and process improvement. As such, the proposed training will help CEMCO implement technology improvements.

Training will take place at the Company’s facilities in the City of Industry and Pittsburg. It will be provided by both in-house subject matter experts, and vendors to be identified during the contract term.

Retrainee - Job Creation

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

CEMCO recently moved into a new headquarters building and is also upgrading a separate manufacturing facility in the City of Industry. With this increase in manufacturing capacity, the Company hopes to enter new markets for its steel framing products such as the solar industry, multi-family construction, and medical facilities. In this proposal, CEMCO has committed to hiring 35 new employees across multiple occupations (Job Number 2) to facilitate the Company’s planned growth. Newly-hired employees will require extensive training to successfully support expansion and increased business volume.
The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

**Training Plan**

**Business Skills** (10%) - Training will be offered to all occupations. Training will provide workers with the skills to interact effectively with customers, manage goals and priorities, assess customer expectations, and identify opportunities to increase sales.

**Computer Skills** (15%) – Training will be offered to all occupations. Employees will receive training in the functionality and capabilities of the Company’s improved ERP system. Trainees will learn how to use new system navigation skills and resource planning tools to perform their jobs more efficiently. Select staff will also receive Adobe Suite and Microsoft Office training to assist with productivity.

**Continuous Improvement** (40%) – Training will be offered to all occupations. This training is designed to improve efficiencies throughout the organization, with emphasis on lean concepts, teambuilding, and problem solving. Quality management systems training will provide workers with the technical skills to meet customer demand and industry specifications.

**Management Skills** (5%) – Training will provide Managers and Supervisors with the leadership and strategic planning skills to become more effective leaders within the organization.

**Manufacturing Skills** (30%) – Training will be offered to Production Staff, Engineers, Technicians, and Managers/Supervisors. Trainees will learn to implement good manufacturing practices, operate and maintain equipment, follow standard operating procedures, and manage supply chain issues.

**Temporary to Permanent Hiring**

CEMCO intends to train approximately 35 workers in Job Numbers 1 and 2 under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to CEMCO, the average time for “converting” temporary workers into full-time permanent employment is within six months. Once hired, these workers become eligible to receive employer-paid share-of-cost healthcare premiums after 60 days of 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 CEMCO 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.

**Commitment to Training**

CEMCO spends approximately $50,000 on training annually per location in California. This training consists of new employee orientation, multi-generational diversity, job-specific on-the-job training, and company-wide soft skills. Safety training is provided in accordance with all pertinent requirements under state and federal law.
Training Infrastructure

CEMCO’s internal project team will oversee scheduling, delivery, and tracking of training. The Company has also retained an experienced administrative consultant to ensure that training administration and documentation adhere to ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

California Manufacturing Technology Consulting (CMTC) in Torrance assisted with development of this proposal. CMTC is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000. In this proposal, the fee will be $15,000. This fee does not affect the approved amount of funding.

ADMINISTRATIVE SERVICES

CMTC 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
- Customer Service
- Finance & Accounting
- Goal Setting
- Product Knowledge
- Business Writing
- Conflict Management
- Effective Meeting Skills
- Presentation Skills
- Time Management Skills

### COMPUTER SKILLS
- Adobe Suite
- Microsoft Office (Intermediate & Advanced)
- Enterprise Resource Planning (ERP)

### CONTINUOUS IMPROVEMENT
- Document Control
- Mistake Proofing
- Quality Control Check Points
- Quality Inspection
- Quality Management Systems
- Teams and Team Building
- Problem Solving
- Leadership
- Leading Change
- Lean Manufacturing
- Six Sigma

### MANAGEMENT SKILLS (managers and supervisors only)
- Management/Supervisory Skills
- Strategic Planning

### MANUFACTURING SKILLS
- Inventory Control
- Good Manufacturing Practices
- Equipment Operations
- Material Requirements Planning & Processes
- Preventative Maintenance
- Shop Math and Geometric Dimensioning & Tolerancing
- Productions Skills
- Programmable Logic Controllers
- Writing Standard Operating Procedures (SOPs)
Requirements for Device Safety*  
Supply Chain Management  
Manufacturing Logistics Management

*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.
RETRAINEE - JOB CREATION
Training Proposal for:
Clarkwestern Dietrich Building Systems LLC
Agreement Number: ET17-0431

Panel Meeting of: February 23, 2017
ETP Regional Office: San Diego
Analyst: H. Bernard

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Job Creation Initiative</th>
<th>Priority Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td>Manufacturing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>Yes ☒ No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Counties Served:    | Riverside, Yolo |
| Repeat Contractor:  | Yes ☒ No  |
| Union(s):           | No ☒ Yes  |

Number of Employees in: CA: 200  U.S.: 1,000  Worldwide: 1,282
Turnover Rate: 10%
Managers/Supervisors: (% of total trainees) 3%

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>= Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$187,200</td>
<td>$0</td>
<td>$0</td>
<td>$187,200</td>
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</table>

In-Kind Contribution: 100% of Total ETP Funding Required  $197,600
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority rate</td>
<td>Continuous Impr., Mgmt Skills, Manuf. Skills, OSHA 10/30, HazMat</td>
<td>200</td>
<td>8 - 200, 0</td>
<td>$846</td>
<td>$16.16</td>
</tr>
<tr>
<td>2</td>
<td>Retraineepriority rate</td>
<td>Continuous Impr., Manuf. Skills, OSHA 10/30, HazMat</td>
<td>9</td>
<td>8 - 200, 0</td>
<td>$2,000</td>
<td>*$14.76</td>
</tr>
</tbody>
</table>

*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: $16.16 per hour in Riverside & Yolo Counties; Job Number 2 (Job Creation): $13.22 per hour in Riverside 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 $1.40 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Number 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operations Staff</td>
<td>145</td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff/Technicians</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>Management Staff</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Sales/Administrative Staff I</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Sales/Administrative Staff II</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Job Number 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operations Staff</td>
<td>9</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Clarkwestern Dietrich Building Systems LLC (Clarkwestern Dietrich) (www.clarkdietrich.com) specializes in steel construction products and services across the United States and abroad. Using cold-formed steel, Clarkwestern Dietrich manufactures products for interior framing and finishing; exterior framing; and floor and roof framing. The Company also produces clips, connectors, metal lath, barrier mesh and other accessories. The Company’s products are primarily utilized in commercial buildings including but not limited to schools, hospitals, office
parks and stadiums. Customers include Home Depot and Lowe’s; also, home improvement contractors including architects, engineers, building developers and general contractors.

Clarkwestern Dietrich is headquartered in Ohio and has two California facilities, in Riverside and Woodland. Both California facilities will participate in the proposed Agreement. The Company is eligible as a single employer for standard retraining and priority-industry funding under the out-of-state competition provisions as a NAICS identified industry.

**PROJECT DETAILS**

This will be Clarkwestern Dietrich’s second Agreement, and the second in the last five years. During the first ETP Agreement (ET15-0208), the Company’s training focused on the launch of new manufacturing lines. It also supported the transitioning from a merger: integration of the two company’s personnel, systems, and products. The Agreement trained 135 employees at the Company’s two California facilities. This proposal will include employees that received training in the prior ETP project. However, these trainees will not receive duplicate training. Training will expand upon the previous proposal.

For this proposal, Clarkwestern Dietrich will focus on managing growth. The number of full time staff in California has almost doubled since the last Agreement and the Company expects another 8-10% growth through 2017.

To manage growth, the Company must invest in new equipment and improve processes. The Riverside facility purchased a Press Brake and Lath Line at a cost of over $1M and the Woodland facility installed a new Slitter and TrakLoc machines last year. The Company is also working to improve production processes with the implementation of Lean Manufacturing processes at both facilities.

Clarkwestern Dietrich will also provide cross-training, to allow staff greater flexibility. As an incentive, the Company has installed a system whereby staff can be promoted and receive pay increases as they learn to successfully operate different machines on the production floor.

**Retrainee - Job Creation**

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

Clarkwestern Dietrich is making significant investments in new equipment and has experienced significantly increased business capacity in the last year and will be adding newly-hired employees to existing operations. The Company has committed to hiring nine employees during this term (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**

All training under this ETP project will be provided via Classroom/Laboratory training at the Riverside and Woodland locations. Most training will be provided by in-house trainers; however, some training will require the use of vendors. The Company has created a training plan and will be ready to start training. Training on equipment will begin immediately after approval. The Company will also be providing monthly training sessions for Operations Staff, Managers and Administrative Staff in order to implement new lean processes. These training sessions will
encourage staff to take ownership of the production floor flow and become problem solvers in their respective roles.

**Continuous Improvement** (35%): Training will be offered to all occupations. Training will include the following topics: problem solving, decision making, communication skills and time management. Training will improve reporting, quality controls and internal policies and procedures. Training will also help to eliminate waste and create a high performing workplace.

**Management Skills** (10%): Training will be offered to Management Staff and will include coaching skills, leadership and conflict resolution. This training will allow for more efficient management of staff and plant operations during the project growth initiatives.

**Manufacturing Skills** (45%): Training will be offered to all occupations. Operations, Maintenance Staff/Technicians and Management Staff will receive equipment training, cross-training, automated numeric control, and operating standards. Administrative Staff will be provided training in standard operating procedures to understand plant operations required for fiscal responsibility.

**Certified Safety Training** (10%): Training will be offered to all frontline staff including Operations Staff, Maintenance Staff/Technicians, and Management Staff.

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 also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, operations staff, management staff and maintenance 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.

**Request to Use an Out-of-State Administrator**

The Panel may authorize reimbursement for the cost of services provided by an out-of-state vendor if the Panel finds that such services are unique to the needs of the Contractor per Title 22, California Code of Regulations (CCR), Section 4421.

Clarkwestern Dietrich requests to use an out-of-state administrator: Training Grants Intelligence, Inc. This is the same subcontractor as had been retained in the previous Agreement.

**Commitment to Training**

ETP funds will not displace the Company’s existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under
state and federal law. Clarkwestern Dietrich spends about $50,000 annually per facility for training. The Company is committed to investing in training and skills upgrades.

- **Training Infrastructure**

  Training will be overseen by a staff member at the Company’s headquarters in Ohio. Additionally each location in California will assign a plant manager to oversee and coordinate training. These members will collect and review the ETP rosters. The Company has also retained a subcontractor to assist with administration.

**Impact/Outcome**

Trainees who participate in the OSHA 10/30 training will receive the appropriate certification. Additionally, trainees who participate in Continuous Improvement training may receive certifications through lean six sigma in green and black belt certifications.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0208</td>
<td>Riverside, Woodland</td>
<td>08/04/2014–08/03/2016</td>
<td>$82,800</td>
<td>82,800</td>
<td>(100%)</td>
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</tbody>
</table>

**DEVELOPMENT SERVICES**

Clarkwestern Dietrich retained TGII in Suwanee, GA to assist with development of this proposal at no charge.

**ADMINISTRATIVE SERVICES**

Clarkwestern Dietrich also retained TGII 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:

CONTINUOUS IMPROVEMENT
- Leadership Skills for Frontline Workers
- Quality Concepts
- Process Improvement
- Team Building
- Problem Solving
- Early Management Skills
- Time Management Skills
- Communication Skills
- Project Management
- Business Performance
- Key Performance Indicators
- Environmental Sustainability
- Business Best Practices
- Customer Service
- Finance and Accounting
- Intrapersonal Skills
- Lean Six Sigma
- Cross Training
- Systems Applications and Products (SAP) Software

MANAGEMENT SKILLS (Managers/Supervisors only)
- Quality Management
- Leadership for Managers
- Coaching Skills
- Conflict Resolution

MANUFACTURING SKILLS
- Manufacturing Materials
- Production Equipment Operations and Maintenance
- Lean Manufacturing
- Cross Training in Operations and Maintenance
- Autonomous Maintenance
- Operating Equipment & Processes
- Technical Processes/Technical Support
- Electrical & Electronic Equipment Operation, Maintenance and Repair
- Pneumatic Equipment Operation
- Good Manufacturing Practices
- Equipment Troubleshooting
- TrakLoc Training
- Crane Equipment Operation
- Preventative Maintenance
- Scissor Lift Training
- Machine Shop Equipment
- Trak Lok Equipment Line
- Press Brake Equipment
- Lath Line Equipment
- Slitter Line

**OSHA 10/30** (OSHA-certified instructor)
- OSHA 10 (requires completion of full 10-hour course)
- OSHA 30 (requires completion of full 30-hour course)

**HAZARDOUS MATERIALS**
- Hazardous Materials

Safety Training will be limited to 10% of total training hours per-trainee. This cap does not apply to HazMat and OSHA 10/30.

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

Training Proposal for:

Cobham Advanced Electronic Solutions Inc.

Agreement Number: ET17-0418

Panel Meeting of: February 23, 2017

ETP Regional Office: San Diego  
Analyst: K. Campion

PROJECT PROFILE

<table>
<thead>
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<th>Contract Attributes:</th>
<th>Retrained Industry Manufacturing</th>
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<tr>
<td>Job Creation Initiative</td>
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</table>

<table>
<thead>
<tr>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Industry:</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>San Diego</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat Contractor:</td>
<td>Yes</td>
</tr>
</tbody>
</table>

| Union(s):                            | No                               |

| Number of Employees in:              | CA: 1,450 U.S.: 1,550 Worldwide: 11,505 |

| Turnover Rate:                       | 1%                               |

| Managers/Supervisors:                | 7%                               |

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs:</th>
<th>$149,440</th>
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<tbody>
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<td>(Substantial Contribution):</td>
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<tr>
<td>(High Ener Reduction):</td>
<td>$0</td>
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<tr>
<td>Total ETP Funding:</td>
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<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
<th>100% of Total ETP Funding Required</th>
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<tbody>
<tr>
<td>$155,570</td>
<td>$155,570</td>
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## TRAINING PLAN TABLE

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<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
</table>

*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 (RetraineepriorityRate)**: $16.72 per hour for San Diego County;
- **Job Number 2 (Job Creation RetraineepriorityRate)**: $13.94 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
- Up to $3.55 per hour may be used to meet the Post-Retention Wage.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>JOB NUMBER 1 (RetraineepriorityRate)</strong></td>
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<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
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<td></td>
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<tr>
<td>Customer Service Staff</td>
<td>10</td>
<td></td>
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<tr>
<td>Engineer</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>IT Staff</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Production Worker</td>
<td>77</td>
<td></td>
</tr>
<tr>
<td>Sales &amp; Marketing Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Technical Support Staff</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Supervisor/Manager/Director</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td><strong>JOB NUMBER 2 (Job Creation RetraineepriorityRate)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>2</td>
<td></td>
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<tr>
<td>Customer Service Staff</td>
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<td>Engineer</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>IT Staff</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION


PROJECT DETAILS

Only the Cobham facility in San Diego will participate in this proposal. The Company has an additional California facility, under a different division, located in San Jose. The products manufactured at the San Jose facility are different from the products manufactured in San Diego, and the San Jose facility operates separately from San Diego. The San Jose division has its own active ETP contract, ET15-0396. This will be the Company’s third proposal in the last five years, the second for the San Diego facility.

In its first project, training focused on new quality initiatives and projected implementation of a new Enterprise Resource Planning (ERP) computer system designed to meet customer demands and support new business processes. The Company had invested more than $3M to convert from a SAP platform to an Oracle platform. However, training was delayed due to business issues with implementation (See Prior Projects). Training in the new ERP system is now scheduled to begin in the first quarter of 2017. This proposal will finish the training planned for the previous ETP Agreement. There will be no duplication of training for trainees who also participated in the prior contract. Curriculum content has been updated since the prior Agreement.

Cobham is a supplier to Orbital ATK Inc. a manufacturer of missile systems. Orbital is requiring Cobham to increase quality and detail of component manufacturing, testing, and shipping information. The Company will meet this requirement by implementing its new ERP system in 2017. The ERP system will allow the Company to meet customer requests quickly and forecast production accurately.

Additionally, Orbital is upgrading its missile system technology and requiring Cobham to modify its technical manufacturing processes. Employees will need training to meet manufacturing demands.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.
Cobham is expanding existing business capacity by adding newly-hired employees to existing administrative, customer service, engineering, management, production, and technical support functions. These hiring projections are based on projected sales, design, engineering and production requirements to meet current and future demand. The Company is committed to hiring at least ten 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 Plan**

The majority of the training will be conducted by in-house instructors. Training vendors may be utilized if necessary.

**Continuous Improvement** (20%) – This training will be provided to all occupations to make significant improvements to Cobham’s quality culture, including areas of error-free manufacturing, general manufacturing procedures, improving operating procedures, Lean Manufacturing, quality systems, root-cause analysis, troubleshooting processes, and waste analysis and elimination.

**Computer Skills** (15%) – This training will be provided to all occupations. Employees will learn to navigate the new ERP operating system. Additionally, they will receive training in desktop applications. Knowledge of these skills will increase output and accuracy of daily tasks.

**Manufacturing Skills** (35%) – This training will be provided to Production Workers and Technical Support Staff. Training on control systems, design standards & processes, equipment cross-training, inspection equipment, machine operation, maintenance procedures, soldering skills, supplier auditing, materials and equipment testing will help improve workplace efficiency and reduce manufacturing errors.

**Business Skills** (20%) – This training will be provided to all occupations except Production Workers. Cobham is improving its customer contact capability. Administrative Staff, Customer Service Staff, Directors, Managers, Supervisors, and Sales/Marketing Staff will learn ways to better communicate with customers. Trainees will receive training on coaching and mentoring, conflict management, customer service and sales skills, effective business reports, goal setting, negotiation skills, and project management. Training will help reduce order errors and improve communication with customers.

Engineers, IT Staff and Technical Support Staff will receive advanced training on effective writing, financial systems, negotiation skills, presentation skills, and project management to present technical specifications to better meet the needs of less technical audiences. Training will improve communication within the organization and improve workers’ understanding of products and manufacturing processes.

**Hazardous Materials** (5%) – This non-certified training will be provided to Production Workers and Technical Support Staff. Cobham uses hazardous materials to clean, prepare, plate, etch, and wash circuit boards. Trainees will receive hazard communication, hazardous materials, and hazardous waste skills training.

**Productive Laboratory** (5%) –

Cobham requests Productive Lab (PL) in Manufacturing Skills for 20 Production Workers. Workers must learn how to operate technical, calibrated RF equipment housed in the production lab. During training, trainees will observe machine operation while the trainers demonstrate functions of the machines, show the trainee how to use the equipment, observe the trainee
using the equipment, correct incorrect behavior, and ultimately certify trainees competent on the equipment. Workers will need between 8 to 30 hours of training on each tool/equipment/process to become proficient. Some trainees could receive up to 100 PL hours; of which a maximum of 40 hours is reimbursable by ETP. The remaining hours are at Cobham’s expense.

The Company projects that 95% of the PL training will be provided in a trainer-to-trainee ratio of 1:1, however, if needed, Cobham requests a trainer-to-trainee ratio of 1:3. This will allow Cobham to train workers rapidly and have knowledgeable workers available to support the production process during times when product delivery is accelerated.

Temporary to Permanent Hiring

Cobham will train ten Production Workers (Job Number 1) under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. The average time for “converting” temporary workers into full-time permanent employment is six months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, 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 Cobham 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.

Director

Of the 15 management trainees in Job Number 1, two have the title of Director. However, these trainees are not executives who set company policy. Therefore these trainees are eligible for ETP reimbursement as management employees.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law. Cobham's annual training budget is approximately $160,000 primarily allocated to new-hire orientation, OSHA-mandated training, sexual harassment prevention, first aid, basic computer skills, and some on-the-job training.

Training Infrastructure

This project will be administered by the Human Resources department. The Senior HR Manager will be responsible for implementation of the training program. A Training Coordinator will schedule training classes, train supervisors on ETP recordkeeping requirements, and collect and file attendance rosters. Cobham will utilize a subcontractor for ETP administration services, including entering data into ETP on-line systems.

The Company has increased the number of dedicated trainers on this proposal available to provide training. The Company has also assigned a dedicated Training Coordinator to take charge of the program and work closely with the trainers on a weekly basis to make sure training objectives are met even in times of high production.
RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by Cobham’s San Jose division under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0396</td>
<td>$199,110</td>
<td>06/30/2015–06/29/2017</td>
<td>330</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

ET15-0396: Based on ETP Systems, 1,513 reimbursable hours have been tracked to date for potential earnings of $28,531 (14% of approved amount). Training is ongoing through March 29, 2017.

The Contractor’s representative reports that the Company has experienced heavy growth during the term of the Agreement, which was unexpected. New hire trainees required more hands-on, on-the-job training than planned, which took resources away from planned ETP training for incumbent workers. Additionally, due to heavy production demands coupled with the Company’s growth, many trainees have been unable to be released to attend classes. As a result of these challenges, the San Jose division projects to earn approximately $37,922 or 19% of the Agreement amount by the end of the Agreement.

PRIOR PROJECTS

The following table summarizes performance by Cobham (formerly REMEC Defense & Space, Inc. dba Cobham Defense Electronics Systems) under an ETP Agreement that was completed within the last five years:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0164</td>
<td>San Diego</td>
<td>7/08/2014–7/07/2016</td>
<td>$327,600</td>
<td>$198,648 (61%)*</td>
<td></td>
</tr>
</tbody>
</table>

*ET15-0164: The Company’s new Enterprise Resource Planning (ERP) system implementation was delayed and a substantial amount of training was never delivered. Additionally, Cobham was challenged with releasing trainees for training due to increased production demands. As a result of these challenges, the Company finished at 61% performance.

For the proposed Agreement, the new ERP system will be implemented by the end of 2017. Therefore, the Company needs to begin training in the first quarter of 2017. To ensure 100% performance, the Company has reduced the weighted average training hours (from 56 hours to 40 hours), reduced the number of workers to receive training, and is only requesting 75% of what they earned under the prior San Diego contract.

DEVELOPMENT SERVICES

Cobham retained National Training Company, Inc. (NTC) in Irvine to assist with development of this proposal for a flat fee of $7,000.

ADMINISTRATIVE SERVICES

Cobham also retained NTC to perform administrative services in connection with this proposal for an amount not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- Error Free Manufacturing
- General Manufacturing Procedure Training
- Improving Operating Procedures
- Leadership Skills
- Lean Manufacturing
- Measuring for Success
- Quality Systems Training
- Root Cause Analysis
- Scheduling & Planning
- Standard Work Instructions
- Team Building
- Train the Trainer
- Troubleshooting Processes
- Waste Analysis and Elimination

COMPUTER SKILLS

- Cobham Software Applications
- Computer Networking
- Enterprise Resource Planning (ERP) Systems
- Database Administration
- Internal Customer Applications
- Internet Applications
- Inventory Control
- Microsoft Office (Intermediate and Advanced)
- Oracle Software Applications
- Project Software

MANUFACTURING SKILLS

- Control Systems
- Design Standards & Processes
- Equipment Cross-Training
- Equipment Maintenance/Repair Skills
- Inspection Equipment
- Machine Operation
- Maintenance Procedures
- Mechanical Systems
- Microwave Assemblies
- Operating Procedures
- Production Systems
- Radio-Frequency Processors
- Soldering Skills
- Supplier Auditing
- Technical Specifications/Procedures
- Testing Materials and Equipment
- Tuning and Test Procedures
- Troubleshooting
- Using Equipment Safely
- Wire Bonding Skills

**BUSINESS SKILLS**
- Coaching and Mentoring
- Conflict Management
- Customer Service and Sales Skills
- Effective Business Reports
- Effective Writing
- Financial Systems
- Goal Setting
- Mentoring for Change
- Negotiation Skills
- Presentation Skills
- Proactive Listening
- Product Knowledge
- Project Management
- Time and Priority Management

**HAZARDOUS MATERIALS**
- Hazard Communication
- Hazardous Materials
- Hazardous Waste

**Productive Lab Hours**

0 – 40

**MANUFACTURING SKILLS** (max of 1:3 trainer-to-trainee ratio)
- Calibration Equipment
- Fault Detection Systems
- Inspection Systems
- Integrated Circuit Board Processors
- Material Handling
- Production Equipment
- Technical Tools
- Wire Bonding Equipment

Safety Training will be limited to 10% of total training hours per-trainee.

**Note:** Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 40 hours per-trainee.
# RETRAINEE - JOB CREATION

## Training Proposal for:

Gar Tootelian, Inc.

**Agreement Number:** ET17-0411

**Panel Meeting of:** February 23, 2017

**ETP Regional Office:** Sacramento  
**Analyst:** W. Sabah

## PROJECT PROFILE

| Contract Attributes: | Retrainees  
| Job Creation Initiative  
| SET  
| HUA | Industry Sector(s): | Wholesale Trade  
| Retail | Priority Industry: | ☒ Yes  
| ☐ No | Counties Served: | Fresno  
| Repeat Contractor: | ☒ Yes  
| ☐ No | Union(s): | ☐ Yes  
| ☒ No | Number of Employees in: | CA: 111  
| U.S.: 111  
| Worldwide: 111 | Turnover Rate: | 5%  
| Managers/Supervisors: | (% of total trainees) | 0% |

## FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$124,575</td>
<td>$0</td>
<td>$0</td>
<td>$124,575</td>
</tr>
</tbody>
</table>

**In-Kind Contribution:** 100% of Total ETP Funding Required  
**Required Amount:** $132,000
# TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineer SET HUA</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat, PL-Comm Skills</td>
<td>111</td>
<td>8-200</td>
<td>$825</td>
<td>*$14.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraineer Job Creation SET HUA</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat, PL-Comm Skills</td>
<td>22</td>
<td>8-200</td>
<td>$1,500</td>
<td>*$11.00</td>
</tr>
</tbody>
</table>

*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:**  SET/HUA: $12.12 per hour for Job Number 1 and $10.50 for Job Number 2 in 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
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>16</td>
<td></td>
</tr>
<tr>
<td>Pest Control Advisor</td>
<td>39</td>
<td></td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Plant Nutrition Staff</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Compliance Staff</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Blending Plant Operator</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Front Line Manager</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blending Plant Staff</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Pest Control Advisor</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Plant Nutrition Staff</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Gar Tootelian, Inc. (Gar Tootelian) (www.gtipros.com) began as a farm in 1944 and later expanded to a small retail fertilizer and agricultural chemical business in Reedley. The Company provides environmentally safe bio-technology, agricultural chemical, and crop services to farming operations in California. Gar Tootelian also provides services on pest diagnosis and control, yield monitoring, water conservation and management, soil analysis, crop analysis, micro-irrigation, and complete nutrition. With the Company’s registered Environmental Protection Agency products and organic products, Gar Tootelian’s specialists are able to maximize crop yields by controlling weeds, pests and plant diseases.

Training will be funded under Special Employment Training (SET). Under SET, the participating employer will not be required to demonstrate out-of-state competition.

PROJECT DETAILS

This will be Gar Tootelian’s third ETP proposal, the third within the last five years. The previous contract focused on increasing staff’s expertise in the science of proper crop nutrition and pest control in drought conditions. In this proposal, training will focus on new technology including Capacity Requirements Planning (CRP) software system to increase efficiency and crop monitoring equipment. This proposal includes employees who participated in prior Agreements and some repeated Curriculum; however, the course content of Curriculum has been updated to eliminate duplication of training. In addition, the trainee population has been expanded to include recently hired employees who have not received ETP-funded training in the past.

Gar Tootelian has updated its processes, due to changes in technology, to better service clients. The Company’s new CRP software system will be implemented in early 2017. This system is specifically designed for the Company’s operational needs, combining sales orders, customer service, accounting, inventory, and HazMat reports into one program (as opposed to multiple computer programs). This system will improve the Company’s inventory control and distribution practices. Additionally, technology such as drones and crop monitoring tools will allow the Company to receive real-time climate/weather reports to monitor crop conditions.

Retrainee - Job Creation

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

With the expansion of a 30,000 sq. ft. warehouse facility, Gar Tootelian must hire new employees to meet operational demands. The Company has committed to hiring 22 new employees (Job Number 2). Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Class/Lab and Productive Lab training will be provided by in-house instructors and vendors.

Business Skills (10%): Training will be offered to all occupations to address the growing need for improved customer service and processes. Training will focus on product expertise, upselling, identifying customer needs, special orders, and business writing to allow employees to better serve clients. Coaching and mentoring skills will be provided to cultivate a positive, high performance workplace environment.
Commercial Skills (20%): Training will be offered to all occupations except Administrative Staff. Pest Control Advisors and Plant Nutrition Staff will receive training on the usage of drones to monitor crop conditions and advising on crop nutrition. Training will focus on the effects of crops when certain chemicals and fertilizers are applied. Compliance Staff will receive training to ensure all new products and equipment are being handled in a safe and efficient manner. All other staff will receive training on the newly purchased blending equipment to properly produce, blend, label, store and deliver products.

Computer Skills (45%): Training will be offered to all occupations. Training will allow staff to utilize the complex CRP software system. Trainee’s will learn to utilize the computer systems for sales, accounting, scheduling, processing, delivery, inventory control and all reporting requests. Training will improve all company processes.

Continuous Improvement (15%): Training will be offered to all occupations on Lean processes, team building and leadership. In the prior contract, the Company focused on identifying terms and theories of process analysis. In this proposal, training will focus on tools and formulas to identify ineffective processes. Teambuilding and leadership training is also needed to improve the company culture and to develop strong organizational leaders.

Hazardous Materials (5%): Training will be offered to Front Line Managers, Pest Control Advisors, Warehouse Staff and Plant Nutrition Staff. Trainees will acquire the skills to identify, contain, and clean waste or accidental chemical spills.

Productive Laboratory – Commercial Skills (5%)

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. Up to 7 hours of PL will be provided to Blending Plant Operators on Augers, Blenders/Mixers and Scales. PL will supplement Class/Lab training. Trainees will learn the precision scales for the measuring of raw products at the beginning of a blending process to the final product for packaging. Trainers will be subject matter experts trained by the equipment manufacturer. Trainers will demonstrate the process prior to observing trainees perform the task. The trainer will mentor trainee until the trainee has an increased level of efficiency, speed and capacity and has been deemed competent in the area. During training, production is expected to decrease while waste and defects are expected to increase. The trainer-to-trainee ratio will not exceed 1:2. Gar Tootelian is requesting this higher trainer-to-trainee ratio because the equipment requires at least two employees to operate.

SET/HUA

Under Special Employment Training (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.

➢ Wage Modification

All trainees work in Fresno, a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. Under SET, HUA trainees qualify at the ETP Standard Minimum Wage instead of the Statewide Average Hourly Wage. Additionally, HUA trainees may qualify for a modification of up to 25% of the ETP Standard Minimum Wage if post-retention wages exceed pre-retention wages. Gar Tootelian is requesting the HUA wage modification from $16.16 per hour to $14.00 per hour for Job Number 1 (13% reduction) and from $13.22 per hour to $11.00 per hour for Job Number 2 (16% reduction).
Commitment to Training

ETP funds will not displace the existing financial commitment to training. Gar Tootelian spends approximately $50,000 annually on training in California. Company-funded training has consisted of new employee orientation, sexual harassment prevention and basic safety. 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 Director will oversee scheduling, documenting and tracking to ensure all training meets ETP requirements. Additionally, the Company has contracted with Strategic Business Solutions to assist with data entry, invoicing, and project management.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0455</td>
<td>$49,588</td>
<td>05/16/2015-05/15/2017</td>
<td>98</td>
<td>58</td>
<td>55</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 2,169 reimbursable hours have been tracked for potential earnings of $47,718 (96% of approved amount). The Contractor projects final earnings of 96% based on training conducted through April 2016. Gar Tootelian has already submitted the final closeout invoice.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>Payment Earned %</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0330</td>
<td>Reedley</td>
<td>04/05/13-04/04/15</td>
<td>$49,456</td>
<td>$47,242</td>
<td>(96%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

Gar Tootelian retained Strategic Business Solutions, LLC in Visalia to assist with development of this proposal for a flat fee of $6,750.

ADMINISTRATIVE SERVICES

Gar Tootelian also retained Strategic Business Solutions, LLC 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**
- Advanced Account Development
- Effective Communications
- Coaching/Mentoring/Evaluation Skills
- Advanced Fiscal and Accounting Strategies
- Advanced Inventory Controls

**COMMERCIAL SKILLS**
- Agronomy Best Practices
- Fertilizer Blending Equipment Operation Best Practices
- Product Knowledge
- Crop Water Utilization Best Practices
- Crop Management Monitoring

**COMPUTER SKILLS**
- Advanced Agriam Software
- CRP Software Operating System

**CONTINUOUS IMPROVEMENT**
- LEAN Processes
- Team Building
- Leadership

**HAZARDOUS MATERIALS**
- Safe Storage and Handling of Hazardous Inventory

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

Productive Lab Hours
0-7

**COMMERCIAL SKILLS** (Trainer-to-trainee ratio of 1:2)
- Fertilizer Blending Equipment Operation Best Practices

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 7 hours per-trainee.
Retrainee – Job Creation
Training Proposal for:
Gardena Hospital, L.P. dba Memorial Hospital of Gardena
Agreement Number: ET17-0432

Panel Meeting of: February 23, 2017
ETP Regional Office: North Hollywood
Analyst: M. Paccerelli

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainee Priority Rate</th>
<th>Job Creation Initiative</th>
<th>SET</th>
<th>Medical Skills Training</th>
<th>Industry Sector(s):</th>
<th>Healthcare</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>☑ Yes</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Los Angeles</td>
<td></td>
<td></td>
<td></td>
<td>☑ Yes</td>
<td>No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>☑ Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 1,400</td>
<td>U.S.: 1,400</td>
<td>Worldwide: 1,400</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>15%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>= Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$224,000</td>
<td>$72,000</td>
<td>$0</td>
<td>$152,000</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $336,000
<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate Medical Skills Training SET</td>
<td>MST Didactic &amp; Clinical Preceptor, Cont. Improvement, Computer Skills</td>
<td>200</td>
<td>8-200</td>
<td>0</td>
<td>*$360</td>
</tr>
<tr>
<td></td>
<td>Priority Rate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Priority Rate Job Creation Initiative</td>
<td>MST Didactic &amp; Clinical Preceptor, Cont. Improvement, Computer Skills</td>
<td>20</td>
<td>8-200</td>
<td>0</td>
<td>$2,000</td>
</tr>
<tr>
<td></td>
<td>Priority Rate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Reflects Substantial Contribution

**Minimum Wage by County:** Job Number 1 (SET/Priority Industry): $22.04 per hour statewide; Job Number 2 (Job Creation): $14.13 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 $3.00 per hour may be used to meet the Post-Retention Wage in Job Number 1.

<table>
<thead>
<tr>
<th>Wage Range by Occupation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Occupation Titles</td>
</tr>
<tr>
<td>----------------------------</td>
</tr>
<tr>
<td><strong>Job Number 1</strong></td>
</tr>
<tr>
<td>Registered Nurse</td>
</tr>
<tr>
<td>Licensed Vocational Nurse</td>
</tr>
<tr>
<td>Therapist</td>
</tr>
<tr>
<td>Technician</td>
</tr>
<tr>
<td>Social Worker</td>
</tr>
<tr>
<td>Scientist</td>
</tr>
<tr>
<td>Case Manager</td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
</tr>
<tr>
<td>New Graduate RN</td>
</tr>
<tr>
<td>Registered Nurse</td>
</tr>
</tbody>
</table>

ETP 130 - Single (10/02/14)
INTRODUCTION

Established in 1952, Memorial Hospital of Gardena, a subsidiary of Avanti Health System, LLC (MHG) (mhg.avantihospital.com) is a 172-bed hospital offering medical/surgical, perinatal, intensive care, telemetry, surgical, sub-acute, out-patient, and Level II Emergency services to an estimated population of 70,000 residents.

Although MHG is a subsidiary of Avanti Health Systems, it maintains its own leadership and workforce. The hospital is licensed by the California Department of Health and the United States Department of Health and Human Services’ Centers for Medicare and Medicaid Services (CMS) through Joint Commission accreditation.

MHG is eligible for ETP funding under Special Employment Training provisions for frontline workers and qualifies for ETP’s priority industry reimbursement as a healthcare employer.

PROJECT DETAILS

This will be the MHG’s fourth ETP Agreement, and the fourth within the last five years. This year, the hospital is undergoing a review that will designate it as a Primary Stroke Center. As a result, MHG is developing a more robust New Graduate Registered Nurse (RN) program, while also expanding its mentoring and precepting support programs. MHG also invested $15,000 in Stroke Telemedicine equipment.

MHG’s training goals are to increase quality, accessible healthcare to the community of Gardena and surrounding communities; and to elevate the level of knowledge and skills needed to provide patient care for complex patient populations.

The proposed Curriculum differs from or expands on training delivered in prior projects. Those projects focused on new equipment and an electronic medical record system; and gaining designation as a pediatric center. This proposed training will focus on the new computer system and services not provided in prior projects.

Retrainee - Job Creation

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

MHG is creating new jobs with the expansion of its services, and to keep up with the escalating high demand of its patient population. The hospital is designated by CMS as a Disproportionate Share Hospital; thus, the hospital provides care for a large uninsured, low income population. The hospital averages 150 in-patients per day and 116 Emergency Department visits per day. MHG is committed in hiring 10 Registered Nurses (Job Number 2).

Training Plan

Training will be delivered by in-house subject matter experts and training vendors retained during the contract term.

Medical Skills Training (50%): The Panel has established a “blended” reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model. Training will be offered to all nurses in both Clinical-Preceptor and Didactic environments.
Some allied healthcare occupations listed herein will receive Medical Skills Didactic training topics that are specific to their roles. Recognizing a higher cost of delivery for clinical skills training, the $22 per hour rate, will apply to both Didactic and Preceptor modes of delivery.

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

**Computer Skills (2%):** Training will be offered to all occupations to navigate MHG’s Electronic Medical Recordkeeping system and document patient information electronically.

**Continuous Improvement (48%):** Training will be offered to all occupations to improve staff’s communication and critical thinking skills, enabling them to work independently.

### Special Employment Training/Wage Modification

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage of $29.38 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. MHG requests this wage modification from $29.38 to $22.04 for trainees in Job Number 1.

### Substantial Contribution

MHG is a repeat contractor with payment earned in excess of $250,000 and a former Substantial Contribution at the 30% level, at the Gardena facility within the past five years (see Prior Project Table). Accordingly, reimbursement for trainees at this facility in Job Number 1 will be reduced by 50% for this project, to reflect the hospital’s $72,000 Substantial Contribution to the cost of training. The Substantial Contribution requirement is not applicable for Retraine – Job Creation trainees (Job Number 2).

### Commitment to Training

ETP funds will not displace the existing financial commitment to training. Its annual training budget is $150,000 to $250,000 for on-boarding orientation and other job-specific skills training. Hospital representatives report that safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### Training Infrastructure

The MHG Education Department will oversee all administration under the supervision of the Director of Clinical Education. As a repeat ETP contractor, MHG has well-established internal administrative procedures in place to capture training using rosters completed according to ETP guidelines.
RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0313</td>
<td>Gardena</td>
<td>11/15/14 – 11/14/16</td>
<td>$252,460</td>
<td>$252,460 (100%)</td>
</tr>
<tr>
<td>ET13-0203</td>
<td>Gardena</td>
<td>12/01/12 – 11/30/14</td>
<td>$99,750</td>
<td>$99,750 (100%)</td>
</tr>
<tr>
<td>ET11-0500</td>
<td>Gardena</td>
<td>12/09/10 – 09/30/12</td>
<td>$168,912</td>
<td>$168,912 (100%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

The following vendor has been retained to provide training for an amount to be determined prior to the start of training:

FlexEd (Chino) – Medical Skills training
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

MEDICAL SKILLS TRAINING – CLINICAL PRECEPTOR

- Behavioral Health/Psychiatric Acute Care Services Unit
  - Patient Assessment & Care
  - Acute Psychiatric Care
  - Behavioral Health Nursing Skills
  - Electroconvulsive Therapy (ECT) Skills
  - Care of Pediatric/Adolescent Psychiatry Patient

- 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
  - Intra-Aortic Balloon Pump (IABP) Therapy
  - Intracranial Pressure Monitoring & Ventriculostomy
  - Hemodynamic Monitoring
  - Pre and Post-Operative Care
  - Care of Trauma Patient
  - Management of the Renal Transplant Surgical Patient
  - Ventilator & Tracheotomy Care
  - Stroke Care

- Long Term Care Unit
  (Sub-acute, Skilled Nursing, Transitional Care & Hospice)
  - Patient Assessment & Care
  - Geriatric Nursing Skills
  - Med/Surg Nursing Skills
  - Pre and Post-Operative Care
  - Orthopedic Nursing Skills
  - Hospice Nursing Skills

- Medical/Surgical Unit Training
  - Patient Assessment & Care
  - Medical/Surgical Nursing Skills
  - Pre and Post-Operative Care
  - Orthopedic Nursing Skills
  - Management of the Renal Transplant Surgical Patient
  - Oncology Nursing Skills
• **Obstetrics Unit Training**
  - Patient Assessment & Care
  - Antepartum, Labor, Delivery and Postpartum Skills
  - Neonatal Nursing Skills
  - S.T.A.B.L.E.
  - Advanced & Electronic Fetal Monitoring
  - Neonatal Resuscitation Provider (NRP)
  - Neonatal Intensive Care Unit (NICU) Nursing Skills

• **Operating Room and Post-Anesthesia Care Unit (PACU) Training**
  - Patient Assessment & Care
  - Trauma Nursing Skills
  - Care of the Burn Patient
  - Peri-operative Nursing Skills
  - Pre and Post-Operative Care

• **Pediatric Services Unit**
  - Care of Pediatric Patients – ED
  - Patient Assessment & Care – ED
  - Pre & Post-Operative Care – Outpatient

• **Rehabilitation Services Unit Training**
  - Patient Assessment & Care
  - Medical/Surgical Nursing Skills
  - Pre and Post-Operative Care
  - Post-Orthopedic Surgery Nursing Skills
  - Post-Trauma Injury Nursing Skills
  - Post-Neurological Injury Nursing Skills

• **Special Care Unit Training**
  - Patient Assessment and Care
  - Critical Care Nursing Skills
  - Ventilator & Tracheotomy Care
  - Hemodynamic Monitoring
  - Total Parenteral Nutrition

• **Surgical Services Unit Training**
  - Patient Assessment & Care
  - Trauma Nursing Skills
  - 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
  - Care if the Neurosurgical Patient
  - Intravenous (IV) Therapy
MEDICAL SKILLS TRAINING – DIDACTIC

- Psychiatric Care
- Acute Myocardial Infarction
- Advanced Cardiac Life Support (ACLS)
- Arterial Blood Gas (ABG) Interpretation
- Behavioral Health Nursing Skills
- Basic Life Support (BLS)
- Body Mechanics
- Care of Bariatric Patient
- Care of the Cardiac Patient
- Care of Pediatric Patients - ED
- 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 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
- 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
- Nurse Orientation Training (for New Grads only)
- Nursing Diagnosis Skills
- Nursing Process Skills
- Orthopedic Nursing Skills
- Ostomy & Continence Care
- Pain Management (Acute & Chronic)
- Patient Assessment & Care
- Patient Fall Prevention
- Pediatric Advanced Life Support (PALS)
- Peri-Operative Nursing Skills
- PICC Line Insertion
- Pre and Post-Operative Care
- Psychiatric Nursing Skills
- Psychotropic Medications
- Rapid Response Skills
- Renal Assessment & Management
- Respiratory Assessment & Care
- Restraints
- Surgical Nursing Skills
- S.T.A.B.L.E.
- Telemetry Nursing Skills
- Total Parenteral Nutrition (TPN)
- Transfer Techniques
- Triage Nursing Skills
- Ventilator and Tracheotomy Care
- Wound & Skin Care

CONTINUOUS IMPROVEMENT
- Case Management/Discharge Planning
- Charge Nurse Training/Frontline Leadership Skills
- Communications Skills
- Conflict Resolution Skills
- CORE Measures
- Crisis Prevention Intervention (CPI)
- Critical Thinking Skills
- Culturally Appropriate Care
- Customer Service Skills
- Documentation Skills
- Organization and Time Management Skills
- Patient and Family Centered Care Skills
- Preceptor Skills (train-the-trainer)
- Performance and Quality Improvement and Procedures Skills
- Team Building Skills
- Utilization Review

COMPUTER SKILLS
- Microsoft Office/Excel Skills (Intermediate and Advanced)
- Patient Billing and Accounts Receivable (PBAR) tracking Skills
- Paragon Order Entry Skills
- Electronic Medical Records Application Skills

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

**Training Proposal for:**

**Inter-State Oil Co.**

**Agreement Number:** ET17-0408

**Panel Meeting of:** February 23, 2017

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

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Job Creation Initiative</th>
<th>Industry Sector(s):</th>
<th>Goods Movement</th>
<th>Warehousing</th>
<th>Transportation/Logistics</th>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Sacramento, Yolo, Shasta, Fresno, Alameda</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Repeat Contractor:</th>
<th>Yes</th>
<th>No</th>
</tr>
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<tbody>
<tr>
<td></td>
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<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Yes</th>
<th>No</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 175</th>
<th>U.S.: 210</th>
<th>Worldwide: 210</th>
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</thead>
<tbody>
<tr>
<td>Turnover Rate:</td>
<td>9%</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors: (% of total trainees)</th>
<th>0%</th>
</tr>
</thead>
</table>

### FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$160,560</td>
<td>$0</td>
<td>$0</td>
<td>$160,560</td>
</tr>
</tbody>
</table>

| In-Kind Contribution: | 100% of Total ETP Funding Required | $200,000 |
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority rate</td>
<td>Business Skills, Commercial Skills, Computer Skills</td>
<td>88</td>
<td>8-200</td>
<td>0</td>
<td>$1,620</td>
</tr>
<tr>
<td>2</td>
<td>Retraineepriority rate</td>
<td>Business Skills, Commercial Skills, Computer Skills</td>
<td>10</td>
<td>8-200</td>
<td>0</td>
<td>$1,800</td>
</tr>
</tbody>
</table>

*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: $17.63 for Alameda County; $16.46 for Sacramento County and $16.16 for Yolo, Shasta, and Fresno Counties. Job Number 2: $14.69 for Alameda County; $13.72 for Sacramento County and $13.22 for Yolo, Shasta, and Fresno 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 $3.63 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Up to $0.22 per hour may be used to meet the Post-Retention Wage for Job Number 2.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Driver</td>
<td></td>
<td>55</td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>Sales Staff</td>
<td></td>
<td>17</td>
</tr>
<tr>
<td>Transloading Staff</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Driver</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Sales Staff</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Transloading Staff</td>
<td></td>
<td>3</td>
</tr>
</tbody>
</table>

## INTRODUCTION

Founded in 1970 and headquartered in Sacramento, Inter-State Oil Co. (Inter-State) produces, sells and distributes fuel, automotive lubricants, and Biodiesels used by the Agricultural Industry, Government Agencies and Service Stations. The Company’s retail clients include Quaker State and Pennzoil. Inter-State has facilities throughout CA. Only the six facilities in Sacramento, Yolo, Shasta, Fresno and Alameda counties will participate in ETP-funded training.
PROJECT DETAILS

Over the next 2 years, Inter-State will spend over $1 million in new equipment in an effort to expand rail transloading services (training not included in the price). This new equipment includes four new Transloaders, Fuel Storage Tanks & Trucks, a custom built Diesel Exhaust Fluid (DEF) Truck and testing and processing equipment for biodiesel and renewable diesel products. The equipment will allow the Company to service more clients and expand fuel products offered. Training will ensure employees can safely operate and maintain equipment. Additionally, Inter-State is looking to improve sales. The Company has developed a training plan focused on product knowledge to equip workers with skills to better explain and recommend products based on client needs. The product training plan will also focus on sales skills to effectively market new and existing product lines. This training will allow Inter-State to expand their client base and encourage company growth.

Retrainees - 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.

Inter-State is increasing business capacity by hiring new employees. The Company has committed to hiring 10 new employees (Job Number 2). Most of the new employees will be hired for the newly expanded Sacramento facility which will accommodate an expanded sales branch and used oil processing plant. This expansion will allow the Company to reach more clients and create a greater investment in renewable fuels.

The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Class/Lab training will be delivered by internal subject-matter experts and vendors.

Business Skills (15%): Training will be offered to Sales Staff to improve marketing and sales techniques as well as increase product knowledge. Courses include Marketing, Product Features & Benefits, Sales Techniques and Accounting Methods. Training will improve product knowledge and client satisfaction.

Commercial Skills (75%): Training will be offered to Drivers, Warehouse Staff and Transloading Staff to ensure trainees have the knowledge to effectively use and maintain the new equipment. Topics include Rail Transloading, Fuel Hauling and Delivery, Quality Assurance and Used Cooking Oil Processing.

Computer Skills (10%): Training will be offered to all occupations to increase knowledge of internal systems. Training will ensure competency in all aspects of software including procurement, accounting and distribution. Courses include Delivery Scheduler, Shell Connect and Summit software.

Commitment to Training

Inter-State has an annual training budget of $35,000 per facility. Training includes new-hire orientation, staff development 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**

Most training will be provided by in-house subject matter experts consisting of senior-level staff and dedicated technical trainers. Inter-State may also use vendors. Given the industry, the Company normally provides training on an ongoing basis to ensure safe and efficient production practices are used at all facilities at all times. The Company has a detailed training plan and is ready to commence training upon Panel approval.

A training coordinator will be assigned to each participating facility. The coordinators will track, schedule and administer ETP-funded training. The Chief Operating Officer at the HQ facility in Sacramento will oversee all training.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

To Be Determined
Class/Lab Hours

8-200  Trainees may receive any of the following:

**BUSINESS SKILLS**
- Marketing
- Product Features & Benefits
- Sales Techniques
- Accounting Methods
- Route Management
- Leadership
- Processing Paperwork

**COMPUTER SKILLS**
- Sales Force
- DM2 Upgrades
- Delivery Scheduler
- Shell Connect
- Summit

**COMMERCIAL SKILLS**
- Rail Transloading
- Fuel Hauling and Delivery
- Lab Analysis
- Customer Collection
- Loading at the Rack
- Warehouse Oversight
- Storage
- Labeling
- Quality Assurance
- Facility Safety
- Placarding
- Emergency Response
- Used Cooking Oil Processing
- Tank Refurbishing

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:

Riverside County Economic Development Agency

Agreement Number: ET17-0414

Panel Meeting of: February 23, 2017

ETP Regional Office: San Diego

Analyst: J. Davey

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Rate Retraine</td>
<td>Manufacturing</td>
</tr>
<tr>
<td>SB &lt;100 SET HUA</td>
<td>Services</td>
</tr>
<tr>
<td></td>
<td>Warehousing</td>
</tr>
<tr>
<td></td>
<td>Healthcare</td>
</tr>
<tr>
<td></td>
<td>Technology/Other</td>
</tr>
<tr>
<td></td>
<td>Priority Industry: Yes No</td>
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</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Riverside, San Bernardino, Orange, Los Angeles</td>
<td>Yes No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Turnover Rate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes No</td>
<td>≤20%</td>
</tr>
</tbody>
</table>

| Managers/Supervisors: (% of total trainees) | ≤20% |

FUNDING DETAIL

Program Costs + Support Costs = Total ETP Funding

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<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$228,600</td>
<td>$15,715 (8%)</td>
<td>$244,315</td>
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In-Kind Contribution: 50% of Total ETP Funding Required

<table>
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<tr>
<th>In-Kind Contribution:</th>
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<tbody>
<tr>
<td>Job No.</td>
<td>Job Description</td>
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<tr>
<td>---------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>1</td>
<td>Retrainee</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Priority Rate SB&lt;100</td>
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<td></td>
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<td></td>
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<td>3</td>
<td>Retrainee Priority Rate HUA</td>
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<td>4</td>
<td>Retrainee Priority Rate SB&lt;100 HUA</td>
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<td>5</td>
<td>Retrainee Priority Rate SET</td>
</tr>
<tr>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Minimum Wage by County: Job Numbers 1-2: $16.16 per hour for Riverside and San Bernardino Counties; $17.22 per hour for Orange County; and $16.96 per hour for Los Angeles County; Job Numbers 3-4: $12.12 per hour for Riverside and San Bernardino Counties; $12.92 per hour for Orange County; and $12.72 per hour for Los Angeles County; Job Number 5: $22.04 per hour (modified SET Statewide 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

Participating employers may use health benefits to meet the Post-Retention Wage.
**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Staff</td>
<td></td>
<td>78</td>
</tr>
<tr>
<td>Engineers</td>
<td></td>
<td>41</td>
</tr>
<tr>
<td>Healthcare Professionals</td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>Managers</td>
<td></td>
<td>49</td>
</tr>
<tr>
<td>Manufacturing Technicians/ Mechanics</td>
<td></td>
<td>41</td>
</tr>
<tr>
<td>Nurses</td>
<td></td>
<td>20</td>
</tr>
<tr>
<td>Production Staff</td>
<td></td>
<td>67</td>
</tr>
<tr>
<td>Supervisors</td>
<td></td>
<td>56</td>
</tr>
<tr>
<td>Technicians</td>
<td></td>
<td>41</td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Riverside County Economic Development Agency (RivCoEDA) oversees Workforce Innovation and Opportunity Act (WIOA) employment training and career services for nearly two million residents in Riverside County. RivCoEDA promotes economic and community development through programs including Community Development, Job Training, Employer Services, and Community Development Block Grants. Employment and training services to workers are offered through three full-service Workforce Development Centers, satellite offices, and partnering subcontractor facilities.

This will be the ninth Agreement, fourth in the last five years between RivCoEDA and ETP. RivCoEDA is eligible as a local Workforce Development Board.

**PROJECT DETAILS**

**Employer Demand**

The core group of employers represents 80% of the proposed number of trainees. RivCoEDA representatives report that its core group of employers has identified their business operational needs and completed recent training assessments. These employers identified training topics that are critical to improving staff skill sets to increase productivity and meet their business needs. Some curriculum courses are repeated from prior Agreements. However, no trainees among the previous participating employers will receive the same level of training in the same skills.

To ensure employer need and commitment, RivCoEDA revised its employer needs analysis to include questions targeted to measure each employer’s training needs and commitment to send employees to training and to anticipate post-training employee job skill enhancements. Targeted employers were instructed that training must be planned around current production and staffing needs in order to gain the employee skills identified in the needs analysis.

For this proposal, RivCoEDA has also added healthcare trainees, primarily at Riverside Medical Clinic. The Clinic recently expanded and will need to upgrade the skills of current personnel to be a quality healthcare provider. Training will be for Healthcare Professionals, Administrative Clerks, and Technicians hired in the last year to better prepare them to assume roles in new facilities.
Training Plan

Business Skills (15%) – Training is designed to enable trainees from all occupations to incorporate team-oriented processes to enhance product quality and improve operating efficiencies at each participating employer’s facility.

Computer Skills (10%) – Training will provide trainees from all occupations the skills to use software effectively. Only trainees from Small Businesses will take Beginning Microsoft Office and Internet Usage courses to improve company operating efficiencies.

Continuous Improvement (15%) – Training will equip trainees from all occupations with the tools to make informed decisions that will have the maximum positive affect on a company’s performance. Trainees will acquire skills in problem-solving techniques, identifying obstacles, and achieving expected outcomes. Employees, working in a team environment, will identify action plans, priorities, and measure results to improve internal operating procedures.

Literacy Skills (10%) – Training will be provided to Administrative Staff, Manufacturing Technicians, Mechanics, Production Workers, and Supervisors in Vocational English as a Second Language (VESL). These skills will be focused on job-related English to facilitate the skills training each trainee will receive. No more than 45% of a trainee’s total training hours will be given in Literacy Skills.

Management Skills (20%) – Training will give Managers and Supervisors the tools and interpersonal skills needed to effectively lead individuals and teams. Managers and Supervisors will learn to motivate, build trust, create partnerships, handle conflicts, and help employees adapt to change.

Manufacturing Skills (15%) – Training is mainly for Production Workers, though some Engineers, Managers/Supervisors, and Technicians may take one or more courses. The focus will be on helping Production Workers to perform efficiently and better understand manufacturing processes.

Hazardous Materials (5%) – Training will give Managers, Manufacturing Technicians, Mechanics, and Supervisors the skills to safely identify, store, pack, and ship different types of hazardous materials. This training can also be delivered as a series of courses, specific to industry sectors involved in the transport of hazardous materials. However, Hazardous Materials training in this project will be limited in scope and customized to the individual needs of the employer.

Certified Safety Training

OSHA 10/30 (10%) – Managers, Manufacturing Engineers, Manufacturing Technicians, Mechanics, Production Workers, Supervisors, and Technicians will take customized courses as needed by their employer. This training is a series of courses “bundled” by industry sector, 10 hours 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.
Commitment to Training

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

Support Costs/Marketing Plan

RivCoEDA uses direct marketing, e-mail campaigns, local newspaper advertising, flyers, website, and telemarketing notification of available training services to employers and business organizations in its service area. A core group of employers was established for the proposed training plan. The core group represents at least 80% of the requested funding. RivCo EDA will continue to market to potential participating employers throughout the Agreement, as may be needed to maintain 100% participation. RivCoEDA requests 8% support costs which will also cover Needs Analysis and training plan development.

Approximately 80% of all training will take place at each participating employer’s worksite and the remaining will be delivered at facilities located at the University of California, Riverside (UCR). Support costs will be divided equally between UCR and RivCoEDA.

Trainer Qualifications

As a Workforce Investment Board, RivCoEDA does not employ staff qualified to deliver the proposed training topics. The UCR Extension Center has provided all instructors for RivCoEDA’s past ETP Agreements. RivCoEDA representatives report a history of positive employer feedback regarding the quality of UCR-delivered training.

UCR will again be retained to provide all training for this project, based on each individual employer’s needs analysis for the proposed training plan. The trainers will be employees of the college and will have, at minimum, bachelor’s degrees from accredited colleges as well as experience in their area of expertise. All trainer resumes and qualifications will be approved by the UCR Academic Review Board.

Training Coordinator

RivCoEDA’s Project Administrator will be responsible for coordinating the administration of this ETP-funded training plan. In addition, one UCR staff member will assist with administration activities, which will include marketing, employer needs assessments, and scheduling of class/lab training. RivCoEDA evenly splits earned ETP payment reimbursement for administration.

High Unemployment Area

The 131 trainees in Job Numbers 3 & 4 work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. Participating employers located in these areas of Los Angeles, Orange, Riverside and San Bernardino counties qualify for HUA status under these standards. 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. RivCoEDA is asking for a 25% wage modification (See Minimum Wage by County table on page 2).

RECOMMENDATION

Staff recommends approval of this proposal.
**ACTIVE PROJECT**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term (Estimated)</th>
<th>No. Trainees</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0213</td>
<td>$75,362</td>
<td>12/31/2015-12/30/2017</td>
<td>114</td>
<td>57</td>
<td>13</td>
</tr>
</tbody>
</table>

*ET16-0213 – Based on ETP Tracking Systems, 3,003 reimbursable hours have been tracked for potential earnings of $64,989 (86% of approved amount), which the Contractor expects fully earn. The closeout invoice will be processed in March.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term (Estimated)</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0108</td>
<td>Multiple</td>
<td>09/03/2013-09/02/2015</td>
<td>$75,778</td>
<td>$61,793</td>
<td>(82%)</td>
</tr>
<tr>
<td>ET11-0226*</td>
<td>Multiple</td>
<td>05/10/2011-05/09/2013</td>
<td>$121,932</td>
<td>$69,185</td>
<td>(57%)</td>
</tr>
</tbody>
</table>

*ET11-0226 – The original funding amount approved was $69,402. RivCoEDA was approved for additional funding of $52,560 to cover a second phase of training. However, in the second phase, employers were unable to complete training and retention within the remaining two year contract period.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

UCR has been retained for the provision of all class/lab training for an amount to be determined.
Exhibit B: Menu Curriculum

Class/Lab Hours
Jobs 1, 3, & 5: 8-200  Trainees may receive any of the following:
Jobs 2 & 4: 8-60

BUSINESS SKILLS
- Project Management
- Construction Management
- Leadership Skills for Frontline Workers
- Communication
- Business Writing
- Customer Service
- Organizational Behavior

COMPUTER SKILLS
- Windows (Intermediate/Advanced)
- MS Project
- MS Office (Beginning, small business only)
- MS Office (Intermediate/Advanced)
- Internet Usage (Small businesses only)
- Information Technology Security
- Shipping Solutions or Related Logistics Software

CONTINUOUS IMPROVEMENT
- Process Improvement
- Problem Solving/Decision Making
- Team Building
- Quality Control Concepts
- Total Quality Management (TQM) Tools
- Lean Manufacturing Concepts
- 5S (Sort, Straighten, Sweep, Standardize, Sustain)
- Internal Auditing
- Facilities Management and Operations
- Risk Management
- Energy Management
- Lean Six Sigma (Greenbelt)
- Project Scheduling
- New Product Development
- ISO 9000-9001/AS9100
- SMART Goals

HAZARDOUS MATERIALS
- Hazardous Materials Tables
- Hazardous Materials Classifications
- Packing
- Marking
- Labeling
- Loading and Storage
- Placarding
- Shipping Documents
- Hazardous Waste
- Incident Recording

**LITERACY SKILLS**
- Vocational English as a Second Language
- Communication Skills
- Reading, Writing, Speaking and Comprehending Simultaneously
- Introduction to and Comprehension of Short Written Work Products
- Writing Correct Sentences as They Relate to Job Functions
- Pronunciation Skills
- Reading and Comprehension Skills
- Speaking and Understanding Spoken English
- Work Related Communication Skills
- Completing Work Forms and Writing Notes
- Spelling, Phonics, and Capitalization
- Flow Charts
- Basics to Problem Solving
- Effective Listening Skills

(Literacy Skills must be job related and cannot exceed 45% of total training hours, per-trainee.)

**MANAGEMENT SKILLS** (management trainees only)
- Leadership Skills for Managers
- Motivating/Coaching
- Conflict Management
- Managing Differences
- Change Management
- Delegation Skills
- Teambuilding
- Coaching and Mentoring

**MANUFACTURING SKILLS**
- Manufacturing Processes
- Construction Drawings for Building Trade
- Blue Print Reading
- Material Handling/Storage
- Equipment Operation
- Shop Math
- Variance Calculations
- Tolerances

**OSHA 10/30** (Certified OSHA instructor)
OSHA 10 (requires completion of full 10-hour course)
OSHA 30 (requires completion of full 30-hour course)

(Safety Training will be limited to 10% of a trainee's total training hours per-trainee)

**Note:** Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
## Participating Employers in Retraining Multiple Employer Contracts

**Company:** Fireblast Global  
**Address:** 545 Monica Circle  
**City, State, Zip:** Corona, CA 92880  
**Collective Bargaining Agreement(s):** N/A  
**Estimated # of employees to be retrained under this Agreement: 25**  
**Total # of full-time company employees worldwide:** 75  
**Total # of full-time company employees in California:** 50

**Company:** I-Herb  
**Address:** 17825 Indian Street  
**City, State, Zip:** Moreno Valley, CA 92551  
**Collective Bargaining Agreement(s):** N/A  
**Estimated # of employees to be retrained under this Agreement: 50**  
**Total # of full-time company employees worldwide:** 800  
**Total # of full-time company employees in California:** 400

**Company:** Kamm Industries dba PRP Seats  
**Address:** 27555 Commerce Center Dr.  
**City, State, Zip:** Temecula, CA 92590  
**Collective Bargaining Agreement(s):** N/A  
**Estimated # of employees to be retrained under this Agreement: 12**  
**Total # of full-time company employees worldwide:** 50  
**Total # of full-time company employees in California:** 50

**Company:** Luxfer Gas Cylinders/Superform USA  
**Address:** 1995 3rd Street  
**City, State, Zip:** Riverside, CA 92507  
**Collective Bargaining Agreement(s):** N/A  
**Estimated # of employees to be retrained under this Agreement: Luxfer/45, Superform USA /50=95**  
**Total # of full-time company employees worldwide:** 513  
**Total # of full-time company employees in California:** 419
### Participating Employers in Retrainee
### Multiple Employer Contracts

**Contractor’s Name:** Riverside County Economic Development Agency  
**Reference No.:** 16-0664  
**CCG No.:** ET17-0414  

**PRINT OR TYPE IN ALPHABETICAL ORDER**

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<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s):</th>
<th>Estimated # of employees to be retrained under this Agreement:</th>
<th>Total # of full-time company employees worldwide:</th>
<th>Total # of full-time company employees in California:</th>
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<tbody>
<tr>
<td>NFI Industries</td>
<td>3700 Indian Ave.</td>
<td>Perris, CA 92571</td>
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<td>30</td>
<td>7,731</td>
<td>1934</td>
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<tr>
<td>Phenix Technology</td>
<td>12391 Sampson St., Suite H</td>
<td>Riverside, CA 92503</td>
<td>N/A</td>
<td>9</td>
<td>11</td>
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<tr>
<td>Riverside Medical Clinic</td>
<td>3660 Arlington Ave.</td>
<td>Riverside, CA 92506</td>
<td>N/A</td>
<td>75</td>
<td>900</td>
<td>900</td>
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<tr>
<td>RSVC Company</td>
<td>891 Iowa Ave.</td>
<td>Riverside, CA 92507</td>
<td>N/A</td>
<td>40</td>
<td>75</td>
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<tr>
<td>Company: United Natural Foods, Inc.</td>
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<tr>
<td>Address: 22150 Goldencrest Drive</td>
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<tr>
<td>City, State, Zip: Moreno Valley, CA 92553</td>
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<td>Collective Bargaining Agreement(s): N/A</td>
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</tr>
<tr>
<td>Estimated # of employees to be retrained under this Agreement: 50</td>
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<tr>
<td>Total # of full-time company employees worldwide: 300</td>
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<tr>
<td>Total # of full-time company employees in California: 250</td>
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</table>
DELEGATION ORDER

Training Proposal for:
Simpson Strong-Tie Company Inc.
Agreement Number: ET17-0391

Approval Date: January 25, 2017
ETP Regional Office: San Diego
Analyst: M. Ray

## PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraineer Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>Yes</td>
</tr>
</tbody>
</table>

| Counties Served: | Riverside | Repeat Contractor: | Yes | No |

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles Sheet, Metal, Air, Rail, and Transportation Local 170 and Communications Workers of America Local 9415</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Number of Employees in: | CA: 450 | U.S.: 1,500 | Worldwide: 2,000 |

| Turnover Rate: | 6% |

| Managers/Supervisors: (% of total trainees) | 5% |

## FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$99,180</td>
<td>$0</td>
<td>$0</td>
<td>$99,180</td>
</tr>
</tbody>
</table>

| In-Kind Contribution: | 100% of Total ETP Funding Required | $104,690 |
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, OSHA 10/30, PL - Manufacturing Skills</td>
<td>95</td>
<td>8 - 200 0</td>
<td>Weighted Avg: 58</td>
<td>$1,044</td>
</tr>
</tbody>
</table>

Minimum Wage by County: $16.16 per hour 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

Up to $1.16 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Service/Sales</td>
<td></td>
<td>25</td>
</tr>
<tr>
<td>Mechanic</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Production</td>
<td></td>
<td>55</td>
</tr>
<tr>
<td>Engineering/Information Technology</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Finance</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td>5</td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1956, Simpson Strong-Tie Company Inc. (SST) (www.strongtie.com), a subsidiary of Simpson Manufacturing Company, Inc., designs and manufactures a myriad of metal connectors, shearwall panels, as well as anchor and fastening systems for building construction to help increase the structural integrity of homes and buildings. Its product lines include Structural Connectors, Fasteners, Wood and Steel Strong-Wall® prefabricated shearwalls, Anchor Tiedown Systems (for multi-story buildings), Quik Drive® auto-feed screw driving systems, and Anchor Systems (for concrete and masonry). SST is an international supplier of structural building products to industrial, commercial, and residential construction industry.

SST employs more than 2,000 workers worldwide, including 450 in its three California facilities: headquarters in Pleasanton, and manufacturing facilities in Stockton and Riverside. All three locations have benefited from ETP funding in the past (see Prior Project Table).

This will be the second ETP Agreement at the Riverside facility in the last five years, for approximately 95 workers. Concurrently, SST is also submitting a separate funding proposal for
its Stockton facility. This is consistent with the Company’s administrative approach under its two recent projects (ET15-0330 and ET12-0150), to ensure internal control over tracking and documentation (see Prior Project table for ET12-0150). The combined requested funding does not exceed the amount the Company earned under the two most recent projects. In total, both current proposals are under the SEC cap of $425,000.

Prior Performance

In its first ETP project, the training plan included skills training for all three California facilities. Training focused on implementing new processes for die set-up used to manufacture the Company's products as well as increased its development efforts for products used in Do-It-Yourself home improvement, multi-family residential, and some light commercial and industrial markets. Training also focused on innovative new products in green building technology.

In its two most recent projects, SST provided computer, continuous improvement, and manufacturing skills training to a total of 205 trainees (45 weighted average hours). Training supported the implementation of computerized modules on conveyors, robotic welders, auto presses, and forklifts at the Riverside plant which were driven by computer programs. Training also focused on implementation of new lateral system product which was designed to prevent structural damage during a seismic event.

PROJECT DETAILS

Company representatives report that there is a continued increase in customer demands for structural building products, at the rate of 10% in 2016 and a projected (additional) 10% in 2017. In order to keep up with this growth, SST Riverside has committed to more automation in equipment and systems. Specifically, the Company will be upgrading welding robots, automating three auto presses, and improving software systems used to manipulate this equipment.

SST Riverside recently invested $3.4M in other new machineries such as welding fixtures, material handling conveyors/robots, paint line equipment, and wall assembly conveyors and tools. The implementation of new equipment is scheduled for May 2017. Consequently, the Company has designed an extensive training program specifically to provide workers the knowledge and skills to successfully operate new machineries and implement respective computerized operational processes.

In addition, SST Riverside will roll out a comprehensive performance-based training program to formally address skill gaps, with performance assessment.

Training Plan

ETP training will begin upon approval and will be delivered by in-house trainers. Specialized training vendors may be retained during the contract term. Training will be delivered via class/lab and, for the first time in this project, via Productive Lab setting in the following:

Business Skills (5%) – Training will be offered to Customer Service/Sales Staff and Managers. Course topics include Business Strategies, Customer Service Skills, Leadership Skills, and Sales & Marketing Skills. Training will provide workers the skills necessary to provide exemplary customer service and support growth initiatives to successfully implement new and updated business processes.

Computer Skills (10%) – Training will be offered to all occupations. Training topics include applications skills in CAD/CAM, intermediate/advanced software systems and Microsoft Office Suite, and Proprietary Reporting & Support Systems, and Server & Hardware Configurations.
Training will allow workers to generate accurate and up-to-date reports and provide financial and operational visibility.

**Continuous Improvement** (20%) – Training will be offered to all occupations. Course topics such as Quality Concepts, Best Practices, ISO, High Performance Workplace Systems, and Lean Six Sigma will support the Company’s effort to eliminate wasteful activities within its manufacturing and business processes. All frontline workers will receive Decision Making & Problem Solving skills training to empower them to make decisions and take effective actions.

**Hazardous Materials** (5%) – Training will be provided to all occupations. Training in HazMat Handling will increase employee knowledge and skills on how to effectively handle all types of hazards within their working environment.

**Manufacturing Skills** (40%) – Training will be offered to all trainees to develop skills in all areas of production, processes, and procedures. Training topics include Advanced Techniques for new products, industries clients, & processes; Logistics Skills; Design & Engineering; Assembly Skills, Warehousing Skills; Production Skills; and Quality Control. A significant amount of training will focus on newly-acquired equipment and computerized modules to provide workers with knowledge and skills to operate equipment in start-up/installation and operating standards.

**OSHA 10/30** (5%)

OSHA 10/30 training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of training for frontline Production Staff and 30 hours for supervisors.

Completion of the training results in a certificate that expands employment opportunities. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour or 30-hour course.

**Productive Laboratory – Manufacturing Skills** (15%)

The Panel has adopted regulations to authorize reimbursement for training delivered in a Productive Laboratory (PL) setting. PL trainees may produce goods for profit as part of the training, in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training, and special attendance rosters will be used to assist in monitoring.

SST requests PL training for approximately 66 Production Staff, Mechanics, Engineers, and Managers. Training topics include Steel Strong Walls, Material Handling Conveyor, Paint Line, Special Moment Frames, Manual Press Machines, Welding Robots, Automatic Press Machines, and Auto Punch and Cut Press. Trainees may receive all their training hours in PL-Manufacturing Skills (up to 40 hours) or a combination of class/lab including PL hours. Training will be specific to the type of equipment and/or process to ensure trainees receive a broader understanding of the entire manufacturing process.

PL trainers will be qualified, skilled, subject-matter experts, and/or machine-certified to instruct and deliver the course content and material. Trainers are responsible for directing the operations and instructions as well as to provide coaching, mentoring, evaluating, and critiquing trainees as work is performed.

SST also requests that the trainer-to-trainee ratio to vary between 1:1 and 1:3, depending on the type of equipment being used. Staff will benefit from being trained at the same time, rather than two or three repetitive sessions to keep trainer costs to a minimum. The 1:3 ratio for machinery training will also allow the Company to break down equipment once, rather than three times.
The Company anticipates a decrease in production on particular machinery or process during PL to allow trainees to learn the equipment and possibility of products with higher defect levels. This will allow trainees to acquire the skills to become competent in the operation of the equipment without the pressure of normal production requirements.

**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. Its current annual training budget per facility is $50,000 for all training including new employee orientation; on-the-job manufacturing skills; management skills; safety, health, and environmental; clinical trials; forklift; basic computer skills; and any federal/state law mandated training.

➢ Training Infrastructure

SST plans to contract with an administrative subcontractor to assist with ETP project administration. In addition, the Riverside facility has a designated staff member to oversee the training as well as collect and submit training rosters to the administrative subcontractor for data entry into the ETP systems.

**Union Support**

This proposal is supported by, and letters of support have been received by, the following:

1. Los Angeles Sheet Metal, Air, Rail, and Transportation Union Local 170 to train Production Staff; and
2. Communications Workers of America Local 9415 to train Mechanics.

**Out-of-State Vendor**

SST is requesting to use an out-of-state consultant, located in Suwanee, GA. This is Training Grants Intelligence, Inc. (TGII), which assisted in development at no cost. TGII administered the previous ETP projects.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0326</td>
<td>Riverside</td>
<td>12/1/14 – 11/30/16</td>
<td>$162,000</td>
<td>$162,000 (earned – in process)**</td>
<td></td>
</tr>
<tr>
<td>ET15-0330</td>
<td>Stockton</td>
<td>11/17/14 – 11/16/16</td>
<td>$161,250</td>
<td>$160,043 (99%)</td>
<td></td>
</tr>
<tr>
<td>ET12-0150</td>
<td>Pleasanton, Brea, and Riverside</td>
<td>9/16/11 – 9/15/13</td>
<td>$80,910</td>
<td>$51,923 (65%)*</td>
<td></td>
</tr>
</tbody>
</table>
**ET15-0326: The last day of ETP training was 8/29/16. SST Riverside has documented 9,159 eligible training hours for 205 trainees who completed retention to earn 100% of the Agreement amount.

*ET12-0150: SST representatives reported that this Agreement was managed through the Pleasanton facility, and there was a lack of communication between the Pleasanton and Riverside staff. In addition, there were problems with overall recordkeeping. To address these administrative challenges, the Riverside and Stockton facilities requested separate ETP Agreements and training plans for ET15-0326. The improved performance under these ETP Agreements is illustrated above.

**DEVELOPMENT SERVICES**

SST retained TGII in Suwanee, Georgia, to assist with development of this proposal at no charge.

**ADMINISTRATIVE SERVICES**

TGII 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 Strategies
- Customer Service Skills
- Leadership Skills
- Sales & Marketing Skills

**COMPUTER SKILLS**
- Computer Aided Design/Computer Aided Manufacturing (CAD/CAM)
- Intermediate/Advanced Software Systems
- Intermediate/Advanced Microsoft Office Suite Applications
- Proprietary Reporting & Support Systems
- Server & Hardware Configurations

**CONTINUOUS IMPROVEMENT**
- Continuous Improvement Techniques
- Team Building
- Quality Concepts
- Frontline Decision Making & Problem Solving
- High Performance Workplace Systems
- Lean Six Sigma
- Best Practices
- ISO 9001:2008

**HAZARDOUS MATERIALS**
- Hazmat Handling

**MANUFACTURING SKILLS**
- Advanced Techniques for New Products, Industries Clients & Processes
- Logistics Skills
- Equipment Operation and Maintenance
- Design & Engineering
- Equipment Maintenance
- Assembly Skills
- Warehousing Skills
- Production Skills
- Quality Control

**OSHA 10 (Certified OSHA Instructor)**
- OSHA 10 (requires 10 hours completion)

**OSHA 30 (Certified OSHA Instructor)**
- OSHA 30 (requires 30 hours completion)

Safety Training will be limited to 10% of total training hours, per-trainee. This cap does not apply to OSHA 10/30.
**PL Hours**

0 – 40

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

- Steel Strong Walls
- Paint Line
- Material Handling Conveyor
- Special Moment Frames
- Manual Press Machines
- Welding Robots
- Automatic Press Machines
- Auto Punch and Cut Press

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 40 hours per-trainee.
September 20, 2016

Andre El-Khoury
Simpson Strong Tie
12246 Holly Street
Riverside, CA 92509

From: SMART Local Union 170

Dear Andre El-Khoury:

We are aware that employees of Simpson Strong Tie Company, Inc. 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 Simpson Strong Tie Company Inc. 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 Simpson Strong Tie Company Inc., 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 Local Union 170 office at (562) 695-4066.

Sincerely,

Ernesto Tolentino
Business Manager

cc: Mario Vega
Union Business Representative
September 20, 2016

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Simpson Strong Tie
12246 Holly Street
Riverside, CA 92509

From: SMART Local Union 170

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If you should have questions or concerns with regard to this letter of support, please contact our Local Union 170 office at (562) 695-4066.

Sincerely,

Ernesto Tolentino
Business Manager

cc: Mario Vega
Union Business Representative
Training Proposal for:

Squar, Milner, Peterson, Miranda, & Williamson, Certified Public Accountants, LLP

Agreement Number: ET17-0416

Panel Meeting of: February 23, 2017

ETP Regional Office: San Diego

Analyst: J. Davey

### PROJECT PROFILE

| Contract Attributes: | Retraineel | Industry Sector(s): | Services | Financial |
|----------------------|------------|----------------------|----------|
|                      |            |                      | Priority Industry: | Yes | No |

| Counties Served: | Los Angeles, Orange, San Diego | Repeat Contractor: | Yes | No |
|------------------|--------------------------------|--------------------|------|
| Union(s):        | Yes | No |

Number of Employees in:


Turnover Rate: 6%

Managers/Supervisors: 14% (% of total trainees)

### FUNDING DETAIL

- Program Costs: $159,000
- (Substantial Contribution): $0
- (High Earner Reduction): $0
- Total ETP Funding: $159,000

In-Kind Contribution: 100% of Total ETP Funding Required: $566,360
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainees</td>
<td>Business Skills, Comm’l Skills, Computer Skills</td>
<td>212</td>
<td>8-200</td>
<td>0</td>
<td>$750</td>
</tr>
</tbody>
</table>

Minimum Wage by County: $16.96 per hour for Los Angeles County; $17.22 per hour for Orange County; $16.72 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

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate</td>
<td>124</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Manager I</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Senior Manager</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Senior Manager I</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>33</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1951 and headquartered in Newport Beach, Squar, Milner, Peterson, Miranda, & Williamson, Certified Public Accountants, LLP (Squar Milner) is an independent accounting and consulting firm. Its services include accounting, tax, audit, financial and business advisory services to Charter Schools and organizations in the Entertainment, Industrial, Commercial, Hospitality, Government, Restaurant and Real Estate.

Squar Milner maintains five California offices in Encino, Los Angeles, Newport Beach, Rancho Bernardo, San Diego and the Cayman Islands with nearly 300 professionals and staff. All California offices will participate in ETP training. Squar Milner is a member of Allinial Global (formerly PKF North America), an association of over 100 independent accounting and consulting firms that offer international support by connecting its member firms to providers and global networks of accounting firms worldwide.
Squar Milner must keep up-to-date on the constant federal and state tax legislation, the latest Securities and Exchange Commission accounting rules, tax issues and business concepts affecting its clients to remain competitive and grow business. For example, recent accounting rules changes by the Financial Accounting Services Board, the Affordable Care Act, and Pension and Profit Sharing plan changes have created a need for training the accounting teams. Staff must deliver value and expertise to provide maximum benefit to its clients to fully earn the cost of its services.

Training will increase proficiency in the Company's core competencies, so that Squar Milner can provide the best advice and support to its clients.

**Senior Managers**

ETP does not fund training for top level managers that set company policy. No such occupations are included in this proposal. ETP does allow training for a percentage of managers who are exempt from overtime, but do not hire/fire workers (20%). Squar Milner will train 30 Senior Managers (14%), consistent with the cap on managers.

**Frontline Workers**

Managers: Squar Milner will train 25 Managers; whose duties are to manage the work of client engagement. They have less experience and/or expertise than a Senior Manager. Based on the nature and scope of their job duties, these trainees meet the Panel's definition of frontline worker.

Supervisors: Squar Milner will train 33 Supervisors who are work on projects at least 50% of the time. Their occupational title reflects the fact that these trainees have less experience and expertise than Managers. Based on the nature and scope of their job duties, these trainees meet the Panel's definition of frontline worker.

As frontline workers, these trainees are not held to the 20% cap on Managers.

**PROJECT DETAILS**

**Training Plan**

Training will be delivered via class/lab by qualified in-house and training vendors in the following:

**Business Skills** (25%): Training will be offered to all occupations to ensure that employees develop skills to provide quality customer service, deliver informed product presentations and recommendations, and manage project assignments efficiently. Topics in Leadership, Communication, Critical Thinking, Networking, and other topics will give trainees the necessary skills to meet with clients, conduct meetings, make sales presentations, and prospect for new clients.

**Commercial Skills** (50%): Training will be offered to all occupations to ensure compliance with IRS and other regulatory agencies with rapidly changing compliance rules. In order to be the best client advisors, the Company must keep-up with the rule changes and anticipate future changes. Training in a variety of more than 30 course topics, ranging from Accounting & Auditing updates to specific tax code revisions, will be targeted to individual trainees' needs depending on the type of clients they serve. Training in these skills will not replace or duplicate annual certification training to maintain certifications.
Computer Skills (25%): Training will be offered to all occupations in tax accounting, MS Office, Accounting Process and other software skills to improve productivity. This training will enable employees to use these tools to a much greater extent. Training in new versions of the software will also be delivered, as new releases come out. The goal of training will be to enable workers to spend less time on routine tasks and improve efficiency and effectiveness.

Commitment to Training

In 2016, Squar Milner spent $713,734 on training at its five California facilities. The Company provided Discrimination, Sexual Harassment & Retaliation training, New Hire Orientation, Diversity, Conflict Resolution and other general skills training. The Company must train its workers on the changing tax laws and other government requirements that are essential to its business. Most of the training is mandatory as required by law. Squar Milner also provides cross-functional training for trainees who want to move to other positions within the firm.

ETP funds will not displace the existing financial commitment to training.

➢ Training Infrastructure

A Principal will lead the administrative efforts and each location will have an administrative staff person responsible for the tasks required to fully document and implement training. Squar Milner will also be assisted by Training Refund Group.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Training Refund Group in Anaheim assisted with development for a flat fee of $5,000.

ADMINISTRATIVE SERVICES

Training Refund 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
8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Leadership Training
- Marketing
- Communication
- Critical Thinking skills
- Conflict Resolution
- Networking Skills
- Managing Growth
- Presentation Skills
- Time Management
- Project Management

**COMMERCIAL SKILLS**
- Accounting & Auditing Update
- Auditing and Accounting for Fair Value
- Auditing and Accounting for Derivatives
- New Revenue Recognition
- Senior Basics Series
- Staff Basics Series
- Real Estate Auditing and Accounting
- Charter School Auditing and Accounting
- Uniform Guidance Training
- Advanced Senior Training
- Book Ups/Step Ups
- Sampling, Materiality & Staff Accounting Bulletin 108
- Inventory Observation Training
- Internal Controls/Sarbanes Oxley Training
- Acquisitions of Property Entities
- Financial Accounting Standards Tax Provisions for Auditors
- Fraud
- Annual SEC Update
- SEC Quarterly Updates
- Tax Law Updates
- 1031 Exchanges
- Form 990: Non-Profits
- Estate Training
- Basic Int'l Filings & Requirements
- Passive Activity Loss
- Tax Interest
- Tax Provisions
- Research & Development Tax Credit
- IRC Sections 451 & 461
- Foreign Reporting
- Tax Sensitive Investing
- Benefit Plan Training
- Pension Planning
- Municipal Bond Market Today
- Best Practices & Projects
- Overview - All Things Partnerships
- Estimates/Projections
- Form 1099 & Bond Reporting

**COMPUTER SKILLS**
- Tax Research Accounting Skills
- ProSystem FX Tax Software Training
- Advanced MS Office
- Accounting and Process Software
- Accelerated Workflow Automation Software
- ARM Software Training
- Project Scheduling Software

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
Ventura County Community College District

Agreement Number: ET17-0430

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Reeves

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainee SB &lt;100 Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Manufacturing Agriculture</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Ventura</th>
<th>Repeat Contractor:</th>
<th>Yes ☒ No ☐</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Yes ☐ No ☒</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>≤20%</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors: (% of total trainees)</th>
<th>≤20%</th>
</tr>
</thead>
</table>

### FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
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<tbody>
<tr>
<td>$83,000</td>
<td>$5,750</td>
<td>$88,750</td>
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*8%*

<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
<th>50% of Total ETP Funding Required</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$70,000</td>
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</table>
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100 Priority Rate</td>
<td>Business Skills, Computer Skills, Continuous Imp., Literacy Skills, Mfg. Skills</td>
<td>25</td>
<td>8-200 0</td>
<td>$2,780</td>
<td>$16.16</td>
</tr>
<tr>
<td>2</td>
<td>Retraine Priority Rate</td>
<td>Business Skills, Computer Skills, Continuous Imp., Literacy Skills, Mfg. Skills</td>
<td>10</td>
<td>8-200 0</td>
<td>$1,925</td>
<td>$16.16</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $16.16 per hour for Ventura County.

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

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

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

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production Staff</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Support Staff</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

## INTRODUCTION

Founded in 1925, Ventura County Community College District (VCCCD) ([www.vcccd.edu](http://www.vcccd.edu)) is a public multi-college district serving residents and companies throughout Ventura County. VCCCD’s three community colleges (Moorpark, Oxnard, Ventura) provide programs for transfer to four-year colleges and universities, career technical education, basic skills instruction, economic development, and continuing education opportunities. VCCCD is part of the California Community College System and is accredited by the Accrediting Commission for Community and Junior Colleges of the Western Association of Schools and Colleges.

VCCCD is eligible for ETP funding as a public training agency. This proposal targets small to medium-sized manufacturing and crop production companies. The core group of participating employers represents at least 80% of the requested funding.
**PROJECT DETAILS**

VCCCD conducted assessments with each of the participating employers to identify specific training needs and industry-related demands. Employers specifically indicated the need to improve workers’ equipment operation/production skills, workplace communication, and use of software applications to create spreadsheets, manage databases and generate reports. As a result, VCCCD crafted a comprehensive training program that can be customized to meet the unique needs of each employer.

VCCCD anticipates that approximately 80% of the proposed training will be delivered at employer worksites and the remaining 20% will be held at the District’s training facility in Ventura. Training will be provided by VCCCD faculty/staff whenever possible; however, the District may retain specialized training vendors if necessary.

**Training Plan**

**Business Skills** (15%): Training will be offered to all occupations. Training in customer service, communication, and sales/marketing skills will teach trainees how to interact more effectively with internal and external customers, while enhancing overall business performance.

**Computer Skills** (25%): Training will be offered to all occupations. Trainees will learn the effective use of various office productivity solutions and project management tools. Training modules will focus on Microsoft Office applications.

**Continuous Improvement** (10%): Training will be offered to all occupations. Training will focus on Lean principles and process improvement techniques. These modules will provide workers with the skills needed to implement new processes, enhance productivity, and raise efficiency levels within their respective organizations.

**Literacy Skills** (25%): Training will be provided to Production Staff. This training is intended to improve both written and verbal communication, as well as basic math skills for employees with limited English proficiency.

**Manufacturing Skills** (25%): Training will be provided to Production Staff. Trainees will gain the skills and knowledge to operate and maintain equipment, ensure product quality, and implement best practices in manufacturing environments. This training will focus on workplace essentials designed to improve productivity and reduce waste.

**Marketing and Support Costs**

VCCCD’s marketing and recruitment efforts include email campaigns targeting key industry sectors, website communication, and various social media platforms. In addition, VCCCD connects with the community through collaboration with the Workforce Development Board, Job and Career Centers, Ventura County Civic Alliance, South Central Coast Regional Consortium, and other local agencies spurring economic development throughout Ventura County.

VCCCD also allocates resources to perform needs assessments, recruitment, and curriculum customization based on employer feedback. VCCCD is requesting support costs to fund extensive marketing efforts and the recruitment of additional participating employers. 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 Agreement.

**Commitment to Training**

ETP funds will not displace the existing financial commitment to training by participating employers. ETP funds will provide training for businesses with very limited training resources and allow structured training to occur that would not be possible otherwise due to budget constraints. Current training provided by employers includes new employee orientation and compliance-related topics. Safety training is provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  VCCCD has three lead staff members to oversee the implementation of this project. The District is also hiring additional staff to assist with marketing, recruiting, scheduling, and tracking of training to ensure that project administration adheres to ETP requirements.

**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
- Customer Service
- Sales and Marketing

COMPUTER SKILLS
- Microsoft Office Excel (Intermediate and Advanced)
- Microsoft Project

CONTINUOUS IMPROVEMENT
- Lean Six Sigma
- Product Management

LITERACY SKILLS*
- Workplace English/Terminology
- Workplace Mathematics

*Literal training cannot exceed 45% of total training hours per trainee

MANUFACTURING SKILLS
- Workplace Essentials
  - Equipment Operation
  - Equipment Maintenance
  - Troubleshooting

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s)</th>
<th>Estimated # of employees to be retrained under this Agreement</th>
<th>Total # of full-time company employees worldwide</th>
<th>Total # of full-time company employees in California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Materials Corporation dba TenCate Performance Composites</td>
<td>1150 Calle Suerte</td>
<td>Camarillo, CA 93012</td>
<td>N/A</td>
<td>25</td>
<td>145</td>
<td>48</td>
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<tr>
<td>Sunrise Growers</td>
<td>2640 Sturgis Road</td>
<td>Oxnard, CA 93030</td>
<td>N/A</td>
<td>10</td>
<td>1,800</td>
<td>50</td>
</tr>
</tbody>
</table>
# Critical Proposal

Retrainee – Job Creation

Training Proposal for:

Northrop Grumman Systems Corporation

Agreement Number: ET17-0400

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood

**Analyst:** M. Reeves

## PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Critical Proposal</th>
<th>Retrainee</th>
<th>Job Creation Initiative</th>
<th>Veterans</th>
<th>Priority Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td>Manufacturing</td>
<td>Aerospace and Defense</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>☑ Yes</td>
<td>☐ No</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Counties Served:     | Kern, Los Angeles, San Diego, Santa Barbara, Santa Clara, Sonoma, Ventura |
| Repeat Contractor:   | ☑ Yes            | ☐ No      |

| Union(s):            | ☐ Yes            | ☑ No      |

| Number of Employees in: | CA: 29,390 | U.S.: 60,000 | Worldwide: 65,000 |
| Turnover Rate:         | 7%          |
| Managers/Supervisors:  | 9%          |

## FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$862,728</td>
<td>$0</td>
<td>$0</td>
<td>$862,728</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $1,600,000
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority Rate</td>
<td>Business Skills, Computer Skills, Continuous Imp., Hazardous Mat., Mfg. Skills, Advanced Tech., PL-Mfg Skills</td>
<td>1,400</td>
<td>8-200</td>
<td>0</td>
<td>$432</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 24</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraineepriority Rate</td>
<td>Business Skills, Computer Skills, Continuous Imp., Hazardous Mat., Mfg. Skills, Advanced Tech., PL-Mfg Skills</td>
<td>330</td>
<td>8-200</td>
<td>0</td>
<td>$700</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 35</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Retraineepriority Rate</td>
<td>Business Skills, Computer Skills, Continuous Imp., Hazardous Mat., Mfg. Skills, Advanced Tech., PL-Mfg Skills</td>
<td>34</td>
<td>8-200</td>
<td>0</td>
<td>$792</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 36</td>
<td></td>
</tr>
</tbody>
</table>

### Minimum Wage by County:
- Job Numbers 1 & 3 (Veterans): $17.63 per hour for Santa Clara County; $16.96 per hour for Los Angeles County; $16.72 per hour for San Diego County; and $16.16 per hour for Kern, Santa Barbara, Sonoma and Ventura Counties
- Job Number 2 (Job Creation): $14.69 per hour for Santa Clara County; $14.13 per hour for Los Angeles County; $13.94 per hour for San Diego County; $13.22 per hour for Kern, Santa Barbara, Sonoma and Ventura counties

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

### Used to meet the Post-Retention Wage?:
- **Yes** ☑ No ☐ Maybex ☐
  Up to $2.21 per hour may be used to meet the Post-Retention Wage in Job Numbers 1 & 3.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operations Staff</td>
<td></td>
<td>125</td>
</tr>
<tr>
<td>Information Technology/Engineering Staff</td>
<td></td>
<td>325</td>
</tr>
<tr>
<td>Sr. Information Technology/Engineering Staff</td>
<td></td>
<td>150</td>
</tr>
<tr>
<td>Manufacturing/Production/Mechanics Staff</td>
<td></td>
<td>475</td>
</tr>
<tr>
<td>Quality Staff</td>
<td></td>
<td>175</td>
</tr>
<tr>
<td>Supervisor/Manager</td>
<td></td>
<td>150</td>
</tr>
</tbody>
</table>
Critical Proposal

This proposal for Northrop Grumman Systems Corporation (NGSC) has been designated a Critical Proposal by the Governor’s Office of Business and Economic Development based on NGSC’s planned business expansion and commitment to adding new jobs in California. The Company has designated its Palmdale facility as a Manufacturing Center of Excellence, one of only two in the nation; and its San Diego facility as an Engineering Center of excellence, one of three in the nation.

INTRODUCTION

Founded in 1939, NGSC (www.northropgrumman.com) is a global security company that develops innovative products and solutions in unmanned systems, cyber, C4ISR (Command, Control, Communications, Computers, Intelligence, Surveillance and Reconnaissance), and logistics for government and commercial customers worldwide. NGSC operates in four different business sectors: Aerospace Systems, Information Systems, Technical Services, and Electronic Systems. This proposal represents NGSC’s Aerospace Systems Sector only, which focuses on developing, integrating, producing, and supporting manned and unmanned aircraft, spacecraft, high-energy laser systems, microelectronics, and other systems and subsystems critical to maintaining the nation’s security. These systems and technologies are used in a variety of mission areas including intelligence, protected communications, battle management, strike operations, electronic warfare, missile defense, and space science and exploration.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage. However, NGSC is not asking for a reduced wage, as all trainees in this proposal will meet the standard ETP Minimum Wage (including health benefits).

NGSC’s Aerospace Systems Sector plans to add more than 900 new jobs in California. These jobs are expected to be added over the next five years and are anticipated to be created primarily at the Company’s facilities in El Segundo, Mojave, Palmdale, San Diego and Redondo Beach. However, additional hiring may occur at other Aerospace Systems Sector locations throughout California.

<table>
<thead>
<tr>
<th>Job Number 2 (Job Creation)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Operations Staff</td>
<td>35</td>
</tr>
<tr>
<td>Information Technology/Engineering Staff</td>
<td>65</td>
</tr>
<tr>
<td>Manufacturing/Production/Mechanics Staff</td>
<td>210</td>
</tr>
<tr>
<td>Quality Staff</td>
<td>10</td>
</tr>
<tr>
<td>Supervisor/Manager</td>
<td>10</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Number 3 (Veterans)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Operations Staff</td>
<td>2</td>
</tr>
<tr>
<td>Information Technology/Engineering Staff</td>
<td>5</td>
</tr>
<tr>
<td>Manufacturing/Production/Mechanics Staff</td>
<td>15</td>
</tr>
<tr>
<td>Quality Staff</td>
<td>5</td>
</tr>
<tr>
<td>Supervisor/Manager</td>
<td>7</td>
</tr>
</tbody>
</table>
In this proposal, NGSC has committed to hiring a total of 330 new employees over the next two years. 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.

Prior Projects

This will be NGSC’s third ETP Agreement within the past five years (See Prior Projects Table). The Company currently has an active contract that is projected to earn 100% prior to the term end date. Due to NGSC’s large number of planned new hires and extensive amount of training needed to support the Company’s accelerated growth in California, the active project was also designated a Critical Proposal.

This proposal is a continuation in the advancement of NGSC’s manufacturing capabilities and is driven by new training initiatives associated with recently procured aerospace/defense contracts. Some incumbent employees may have participated in a previous contract; however, the Company has confirmed that the subject matter differs by contract/project specifications, so there will be no duplication of training.

PROJECT DETAILS

There are several initiatives impacting the Company’s planned growth, some of which must remain classified. However, the following key developments are driving the need to hire and train net new workers, as well as retrain incumbent staff:

1) NGSC recently secured several new contracts that will require workforce expansion and increased production capacity:
   a) The U.S. Navy has awarded NGSC a contract for the modification of the Japanese E-2D aircraft.
   b) NGSC was also awarded a contract by the U.S. Navy for work relating to the modification of the MQ-4C Triton Drone program.
      These new contracts, which include complex upgrades to aircraft and systems, require that NGSC equip its workforce with the requisite skills to accommodate increased production.
   c) The U.S. Air Force awarded NGSC a contract for work on the Long Range Strike Bomber. The Company will be engineering and manufacturing the aircraft, which is currently planned to be released in the mid-2020s timeframe. This contract will require NGSC to expand its California workforce, as well as upgrade the skills of its incumbent staff as the Company prepares for this new project.

These initiatives require completely new production processes and procedures. NGSC continues to expand its footprint in Palmdale and Mojave to accommodate new manufacturing processes and the global supply-chain needs brought about by production expansion.

Training Plan

Training will take place at multiple NGSC Aerospace Systems Sector locations throughout California. Training will be delivered by in-house subject matter experts and training vendors to be identified during the contract term.
**Business Skills** (10%): Training will be offered to all occupations. This training will focus on communication, negotiation, customer service and documentation skills. Trainees will learn how to provide improved and consistent customer service throughout all business activities.

**Computer Skills** (15%): Training will be offered to all occupations. NGSC uses a variety of complex systems to run its operations and to build and/or test its products. Employees will receive training on systems and computer applications applicable. Automation and manufacturing software are vital tools for NGSC’s operations, and employees must be proficient in these systems.

**Continuous Improvement** (15%): Training will be offered to all occupations, with emphasis on Business Development, Change Management, Leadership/Coaching, Process Improvement and Six Sigma skills. A critical component of all products delivered by NGSC Aerospace Systems is “Zero Defect”. Training is designed to help the Company establish and maintain flawless production processes and quality assurance measures.

**Hazardous Materials** (10%): Training will be offered to Manufacturing/Production/Mechanics, Engineering and Quality Staff. This training will provide supplemental hazardous materials skills to frontline workers and lead personnel. Trainees will learn proper handling of hazardous materials and gases commonly associated with the Company’s manufacturing processes.

**Manufacturing Skills** (30%): Training will be offered to Manufacturing/Production/Mechanics, Quality and Information Technology/Engineering Staff. This training will ensure that workers have the requisite skills to manufacture products using engineering and design directives to produce aircraft that meet strict quality, safety, and zero defect standards.

**Advanced Technology** (10%): Training will be offered to Information Technology/Engineering Staff. This training is designed exclusively for highly technical professionals in the engineering/aviation manufacturing industry. Technical courses include Architectural Modeling, Computer Aided Design, Computer Language, Programming/Software Development, and Software Configuration Management. This training is intended to foster a high level of innovation and product development expertise for the next generation of aerospace manufacturing specialists and engineers.

Advanced Technology (AT) training is costlier to deliver than more generalized computer-related subjects. The Company estimates that costs associated with this specialized training will likely range from $72 to $200 per hour, per trainee, depending on the subject matter. Delivery of AT requires expensive system/design equipment and complex software. The 1:10 trainer-to-trainee ratio will be maintained for AT training, providing in-depth coverage of complex course material and personal attention from the instructor.

**Productive Laboratory** (10%)

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

Certain production skills are best learned through direct observation and hands-on experience. PL training will allow for practical, hands-on instruction that cannot be adequately duplicated in a classroom setting. PL training will be provided to approximately 450 Manufacturing/Production/Mechanics and Quality Staff. PL training will take place at various NGSC Aerospace Systems facilities in California.
Equipment to be used during the proposed PL training includes cranes, forklift, tow tractor, robotic control arm, Moen heater, light cart, air compressor, liquid coolant, hydraulic test stand, aircraft jack, cabin leakage tester, cooling air unit, and paint mixer. Training will be taught by subject matter experts with demonstrated knowledge and expertise in the aerospace manufacturing industry.

NGSC’s training consists of highly technical subject matter that is generally delivered in small group settings to ensure consistency and optimal skills transfer. This small group setting (typically 1:3) allows the trainer to address critical questions while also achieving valuable knowledge sharing among trainees. Therefore, NGSC is requesting a PL trainer-to-trainee ratio of 1:3 and training will be capped at 60 hours per trainee.

Veterans Program

NGSC conservatively plans to train 34 Veterans (Job Number 3) who have served on active full-time duty in the Armed Forces. The Panel has established a higher reimbursement rate and other incentives for training California veterans, as will be reflected in the contract.

Individuals with Disabilities

The Individuals with Disabilities (IWD) program, recently adopted by the Panel, is designed to encourage California employers in their effort to “recruit, hire, train, and retain” workers with disabilities. ETP funding will be available to train these workers, along with other staff who support or have job responsibilities for these trainees. In this proposal, IWD training (Business Skills) will be delivered to incumbent workers and new staff hired during the Agreement term.

Substantial Contribution

NGSC is a repeat Contractor. However, a Substantial Contribution is not being applied because no single NGSC facility has earned $250,000 or more within the past five years.

Commitment to Training

NGSC’s budget for training in California is approximately $7 million for 2017/2018. Company-funded training includes basic job skills training, new employee orientation, diversity, performance management, anti-harassment, extensive on-the-job training, and introductory computer skills. The Company also provides a library of self-paced computer-based training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

   NGSC has two administrators directly responsible for internal project management. In addition, the Company has several trainers responsible for managing the scheduling, delivery, and documentation of training at the various California facilities. NGSC has also retained an administrative consultant to ensure training adheres to ETP requirements.

Recordkeeping

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

RECOMMENDATION

Staff recommends approval of this proposal.
### ACTIVE PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0228</td>
<td>$899,940</td>
<td>11/16/15 – 11/15/17</td>
<td>1,300</td>
<td>*TBD</td>
<td>*TBD</td>
</tr>
</tbody>
</table>

*Based on ETP Systems, 32,152 reimbursable hours have been tracked for potential earnings of $598,494 (67% of approved amount). The Contractor projects final earnings of 100% based on training and in progress.

### PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET12-0208</td>
<td>Palmdale, Manhattan Beach, San Diego</td>
<td>12/19/11 – 12/18/13</td>
<td>$529,505</td>
<td>$226,749</td>
<td>(43%)</td>
</tr>
</tbody>
</table>

The Company’s primary customer is the U.S. Government, and the agreement term for this particular ETP project coincided with the Budget Control Act of 2011, calling for Department of Defense (DOD) budget cuts. Additional mandated reductions took place during the U.S. Government sequestration process which required an additional $40 billion in defense budget cuts during the time period of the ETP Agreement. These budget cuts immediately caused delays in DOD contract awards, suspending deliverables from NGSC. The planned delivery of training was delayed or postponed, as a result.

### DEVELOPMENT SERVICES

Training Funding Partners (TFP) in Fountain Valley assisted with development for a flat fee of $28,500.

### ADMINISTRATIVE SERVICES

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

### TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

**Class/Lab Hours**
8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Business/Technical Writing Skills
- Communication Skills
- Contract/Negotiation Skills
- Customer Service Skills
- Documentation Skills
- Finance/Accounting Skills
- Metrics/Measurement
- Planning and Scheduling
- Presentation Skills
- Sourcing and Procurement Skills
- Supply Chain Management
- Train-the-Trainer Skills

**Individuals with Disabilities**
- Accessibility 102
- Disability Sensitivity and Awareness
- Employment Laws: Disability and Discrimination
- Hiring People with Disabilities
- Interviewing Applicants with Disabilities
  - Leading a Disability Inclusive Workforce

**COMPUTER SKILLS**
- Business Intelligence/Data Management Skills/Digital Data Overview
- Computer Programming/Software Development Skills
- Document Sharing Process System
- Earned Value Management System
- Enterprise Export Management System Skills
- Enterprise Resource Planning System
- Information Handling System
- Information Systems Security
- Intermediate/Advanced MS Office Skills (Word/Excel/PowerPoint)
- Learning Exchange System Skills
- Microsoft Project
- Microsoft Visio
- Opportunity Tracking Tool
- Parts System Skills
- PeopleSoft System Skills
- Product Data Management
- Publication Training (Acrobat Professional XI)
- QuickSilver Training
- Real Time Operating System
- SAP Skills
- Software/Hardware Skills
- System Architecture/Design Skills
- Visual Basic Skills
CONTINUOUS IMPROVEMENT
- Business Development Skills
- Change Management Skills
- Conflict Management Skills
- Resource Planning
- Global Perspectives
- ISO Standards
- Leadership/Coaching Skills
- Meeting Management Skills
- Process Improvement/Six Sigma Skills
- Project/Program Management Skills
- Quality Assurance/Quality Control
- Risk Management Skills
- Strategic Thinking Skills
- Team Building Skills
- Troubleshooting Skills

HAZARDOUS MATERIALS
- Central Transfer Station Hazwaste Generator
- Transportation of Dangerous Goods
- Hazardous Materials/Hazard Communication Skills/Gases
- Resource Conservation and Recovery Act for Environmental Monitors and Supervisors

MANUFACTURING SKILLS
- Advanced Safety Skills
  - Asbestos Awareness
  - Certified Oxygen Cleanliness Instructor
  - Laser Safety and Hazard Awareness
  - Nuclear Safety Training
  - Weapon System Safety Training
  - Integrated Assembly Line Safety
- Aerospace Manufacturing Equipment Training
- Aerospace Manufacturing Operations Skills
- Aircraft Maintenance, Modification and Testing
- Aircraft Structural Design/Development
- Assembly/Subassembly/Fabrication Skills
- Aviation Systems Support Skills
- Engineering Design/Engineering Skills
- Flight Operations
- Manufacturing Automation Systems
- Manufacturing Resource Planning
- Measurement Device Skills
- Metrology
- Missile Defense Agency/Missile Systems
- Paperless Manufacturing Systems
- Process Control Lab Skills
- Production Control
- Robotic Technology
- Sanding/Stripping
- System Test/Checkout

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

**ADVANCED TECHNOLOGY**
- Abortext Software (Authoring for DITA using Arbortext Editor 5.4)
- Architectural Modeling Skills
- Computer-Aided Design Skills
- Computer-Aided Production Environment
- Computer-Assisted Three-Dimensional Interactive Application
- Computer Language Skills
- Computer Programming/Software Development Skills
- Dynamic Object Oriented Requirements System
- Electronic Data Technology
- Engineering Software Skills
- Enterprise Architecture Software/Systems
- Fibre Channel Storage Networking
- Red Hat Enterprise Linux Admin and User
- Service Oriented Architecture
- Software Configuration Management
- Software/Hardware Skills
- System Architecture/Design Skills
- Web Design/Content Management

**Productive Lab Hours**
0-60

**MANUFACTURING SKILLS (1:3 ratio)**
- Aerospace Manufacturing Equipment Training
- Aircraft Maintenance, Modification and Testing
- Aircraft Structural Design/Development
- Assembly/Subassembly/Fabrication Skills
- Robotic Technology

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

Training Proposal for:

Providence West Valley Healthcare Center, LLC dba Providence West Valley

Agreement Number: ET17-0394

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood Analyst: M. Paccerelli

PROJECT PROFILE

Contract Attributes:
- Retrainees
- Priority Rate
- SET
- Medical Skills Training
- HUA

Industry Sector(s):
- Healthcare Services

Priority Industry: ☑ Yes ☐ No

Counties Served:
- Los Angeles, Riverside, Tulare, San Bernardino, Ventura

Repeat Contractor: ☐ Yes ☑ No

Union(s): ☐ Yes ☑ No

Number of Employees in:
- CA: 2,479
- U.S.: 3,373
- Worldwide: 3,373

Turnover Rate: 9%

Managers/Supervisors:
- (% of total trainees) N/A

FUNDING DETAIL

Program Costs: $618,458
(Substantial Contribution) $0
(High Earner Reduction) $0
Total ETP Funding: $618,458

In-Kind Contribution: 100% of Total ETP Funding Required $715,000
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>MST Didactic &amp; Clinical Preceptor, Computer Skills, Cont. Imp.</td>
<td>481</td>
<td>8-200 0</td>
<td>$738 $22.04</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Weighted Avg: 41</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Medical Skills Training Priority Rate SET</td>
<td>MST Didactic &amp; Clinical Preceptor, Computer Skills, Cont. Imp.</td>
<td>392</td>
<td>8-200 0</td>
<td>$540 $12.12</td>
<td>*$12.12</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Weighted Avg: 30</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Job Creation Initiative Medical Skills Training Priority Rate SET HUA</td>
<td>MST Didactic &amp; Clinical Preceptor, Computer Skills, Cont. Imp.</td>
<td>37</td>
<td>8-200 0</td>
<td>$1,400 $10.68</td>
<td>*$10.68</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Weighted Avg: 70</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*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: $22.04 per hour for SET Priority Frontline Workers statewide; Job Number 2 (SET/HUA): $12.12 per hour in Ventura, San Bernardino, Riverside, and Tulare Counties; Job Number 3 (SET/HUA/Job Creation): $10.50 per hour in Ventura County

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

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

Up to $1.23 per hour for Job Number 1 and up to $1.44 per hour for Job Number 2 may be used to meet the Post-Retention Wage.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registered Nurse</td>
<td></td>
<td>66</td>
</tr>
<tr>
<td>Licensed Vocational Nurse</td>
<td></td>
<td>274</td>
</tr>
<tr>
<td>Therapy Assistant</td>
<td></td>
<td>22</td>
</tr>
<tr>
<td>Therapist</td>
<td></td>
<td>119</td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Certified Nurse Assistant</td>
<td></td>
<td>392</td>
</tr>
<tr>
<td><strong>Job Number 3</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registered Nurse</td>
<td></td>
<td>66</td>
</tr>
<tr>
<td>Licensed Vocational Nurse</td>
<td></td>
<td>274</td>
</tr>
<tr>
<td>Therapist</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Certified Nurse Assistant</td>
<td></td>
<td>6</td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 2012, Providence West Valley Healthcare Center, LLC dba Providence West Valley (PWV) (www.westvalleyhc.com) is a skilled nursing facility owned and managed by Providence Healthcare Center, LLC (Providence) based in Utah. PWV’s services include skilled nursing, clinical care, post-surgical care, intravenous therapy, tracheotomy care, pain management, parenteral TPN/PPN therapy, wound care, custodial care, hospice care, respite care, memory care, activity programs, social services, dietary services, occupational therapy, speech therapy, physical therapy and rehabilitation for various disorders including fractures, wounds, joint replacements, amputees, stroke, dysphagia, COPD, decubitis ulcers, general weakness and debilitation, chronic pain, arthritis, Parkinson’s disease, and forms of dementia.

There will be 10 Providence-owned facilities in California participating in this proposal with PWV as the contract holder. The nine other facilities participating in this proposal are as follows:

- Providence Healthcare of Del Rosa Villa, LLC dba Providence Del Rosa Villa in San Bernardino
- Providence Healthcare of Waterman, LLC dba Providence Waterman in San Bernardino
- Providence Healthcare of Mt. Rubidoux, LLC dba Providence Mt. Rubidoux in Jurupa Valley
- Providence Healthcare of Orange Tree, LLC dba Providence Orange Tree in Riverside
- Providence Group, Inc. of Sun Villa, LLC dba Providence Sun Villa of Porterville
- Providence Group, Inc. of Valley Care Center, LLC dba Providence Valley Care Center of Porterville
- Providence Group, Inc. of Lindsay Gardens, LLC dba Providence Lindsay Gardens in Lindsay
- Providence Ojai Gardens Nursing Facility, LLC dba Providence Ojai in Ojai
- Providence Healthcare of Ontario, LLC dba Providence Ontario in Ontario

All these facilities are eligible for priority-industry funding as a Healthcare facility under Special Employment Training (SET) for frontline workers.

PROJECT DETAILS

The proposed training plan will address multiple changes impacting Providence’s business, from the Affordable Care Act to regulatory changes that will be enacted through 2018. These changes have resulted in new quality standards, decreasing reimbursement for services, targeted reduction in hospital readmissions, increased patient population due to more insured patients, and early release of patients.

Additionally, in 2016, the Centers for Medicare and Medicaid Services unveiled major changes to the Nursing Home Compare’s (NHC) five-star rating system (a system that allows consumers to compare information about nursing homes) with new quality measures that must be integrated under the new system. The NHC contains quality of care and staffing information for all Medicare- and Medicaid-participating nursing homes.

Providence has established a system-wide, strategic training plan for all of its facilities with the goal of improved clinical outcomes, advanced skill levels to provide superior care to higher acuity patients, and the training required for the implementation of new technology as follows:

- **“No Falls” Initiative**: Training will greatly reduce the occurrence of patient falls per facility. A fall can significantly limit an older adult’s ability to remain self-sufficient. Over one-third of people aged 65 and older fall each year. A major training initiative for Providence facilities
in the coming year will be an increased emphasis on the prevention of falls among the patient population.

- **Quality Improvement Training:** Training will upgrade clinical outcomes and patient satisfaction through knowledge of ventilator and tracheotomy care, team skills, quality improvement, interdisciplinary team skills, documentation, therapy skills, electronic medical records, wound care, patient fall prevention, cardiac care, atrial fibrillation, preceptor skills, prevention of ventilator acquired pneumonia, congestive heart failure, infection control, pain management, intravenous therapy, diabetes management, dialysis care, medication management and administration, behavior management, psychotropic medication management, mental health program, and dementia/Alzheimer’s patient care skills.

- **Implementation of New EMR System:** Providence is implementing a new Electronic Medical Records (EMR) System utilizing the Point Click Care software to provide an integrated clinical and financial electronic medical record across the Post-Acute Care continuum. The new EMR system is a substantial investment for the Providence facilities and the ETP-funded training will insure that there is a significant return on investment through extensive training of the staff. The cost of the Point Click Care system is approximately $50,000 per facility and training is not included in the purchase price.

**Retraining - Job Creation**

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

Providence is investing $400,000 in a new sub-acute wing at its Ojai facility which will require hiring and training of new employees. Sub-acute care merges the sophisticated technology of a hospital with the efficient operation of a skilled nursing facility. To staff the new sub-acute wing, the Company has committed to hiring 37 employees (Job Number 3) during the term of the proposal.

The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract.

**Training Plan**

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

**Computer Skills** (5%) – Training will be offered to all occupations in the use of the new EMR system to accurately enter and retrieve patient information. Staff will also receive training in the new data set requirements for the new CMS Five Star Rating system.

**Continuous Improvement** (15%) – Training will be offered to all occupations to foster improvement in multiple skills such as team building, culturally appropriate care, medical records, documentation, customer service, standard operating procedures, communication skills, interdisciplinary team skills, and quality improvement.

**Medical Skills** (80%) – Training will be offered to all occupations in order to better understand advanced clinical process, ensure competency, and maximize patient satisfaction and safety.
For Medical Skills training, the Panel has established a higher reimbursement rate of $22 per hour for nurse training, recognizing the higher cost of delivery for the Clinical Preceptor model. The standard class/lab rate, $18 per hour for priority industries will apply to Computer Skills and Continuous Improvement training.

**Special Employment Training**

Under Special Employment Training (SET), employers are 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.

- **Wage Modification**

  Trainees in Job Number 1 are employed in a Priority Industry and qualify for a wage modification up to 25% below the Statewide Average Hourly Wage. The wage modification, from $29.38 per hour to $22.04 per hour, is requested for trainees in Job Number 1.

**High Unemployment Area**

All trainees in Job Number 2 and 3 work in San Bernardino (San Bernardino County), Jurupa Valley (Riverside County), Porterville and/or Lindsay (Tulare County), and Ojai (Ventura County), regions with unemployment exceeding the state average by at least 25%. Trainees qualify for the Standard Wage rather than the SET Statewide Average Hourly Wage. Additionally, the Standard Wage may be modified by up to 25% if the post-retention wage reflects an increase from wages earned at the start-of-training.

For Job Number 2, PWV is asking for a 25% wage modification from the ETP Standard Minimum Wage to the HUA Minimum Wage (from $16.16 per hour to $12.12 per hour) for San Bernardino, Riverside, Tulare, and Ventura Counties. For Job Number 3, the Company is also requesting a 19% wage modification from the ETP Standard New Hire Wage to the HUA New Hire Minimum Wage (from $13.22 per hour to $10.68 per hour) for Ventura County.

**Commitment to Training**

The Company’s current training budget is approximately $35,000 per facility. Training programs include new hire orientation, sexual harassment prevention, safety training, annual computer skills training, skills updates and in-service 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**

  PWV’s staff will coordinate training centrally with the help of a subcontractor, National Training System Inc. Directors of Staff Development at each facility will oversee the internal project administration and training at their corresponding facility.

  The Company has a training plan in place. Employees will need extensive training: patient care providers require significant training to deliver high quality care and Job Creation trainees will need considerable training on processes and systems. The Company is ready to start training when approved.
RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

PWV retained National Training System Inc. (NTS) in Ladera Ranch to assist with development of this proposal for a flat fee of $27,939.

ADMINISTRATIVE SERVICES

PWV also retained NTS to perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

MEDICAL SKILLS (DIDACTIC)
- Restorative Nursing Program
- Annual Skills Update
- Infection Control
- Basic Life Support
- Body Mechanics
- Patient Transfer Techniques
- Equipment Skills (including, but not limited to pumps, vital monitoring devices, support systems, therapeutic modalities)
- Advanced Cardiac Life Support
- Change of Condition Management
- Interdisciplinary Team Process
- Pain Management (Acute and Chronic)
- Intravenous Therapy
- Enteral Feeding Tube Management
- Respiratory Care
- Wound Management
- Diabetic Management
- Urinary Management (foley catheter, input/output)
- Resident and Family Education
- Medication Administration Management
- Restraint and Restraint Reduction
- Behavior Management
- Psychotropic Medication Management
- Patient Assessment & Care
- Physical, Occupational, Speech Therapy
- End of Life Care
- Patient Fall Prevention
- Dementia/Alzheimer’s
- Neurovascular System
- Residents with Special Needs
- Gastrointestinal System
- Laboratory
  - Electrolyte Imbalance
  - Arterial Blood Gas Interpretation
- Cardiac Conditions
- Neurological Conditions
- Resident Emergency Response
- Skeletal/Orthopedic Conditions
- Incontinence Management (colostomy care, urinary catheter care)
- Pro Act Training - Professional Assault Crisis Training and Certification (Pro Act)
MEDICAL SKILLS – CLINICAL PRECEPTOR

- Inpatient & Outpatient Care Unit
  - Medication Management
  - Infection Control
  - Patient Safety
  - Clinical Skills Review
  - Patient Assessment and Care
  - Intravenous Therapy
  - Enteral Management
    - Bolus
    - Intermittent
    - Continuous
  - Feeding Tube
    - Insertion
    - Site Care
    - Removal
  - Dementia Care
  - Assessing of Tube-Fed Individuals with Diabetes Mellitus
  - Preventing and Identifying Complications Related to Tube Feedings
  - Respiratory Care
  - Wound Management
  - Dementia/Alzheimer’s
  - Managing Patients with Neurovascular Conditions
  - Rehabilitation Services
    - Physical Therapy
    - Occupational Therapy
    - Speech Therapy
  - Residents with Special Needs
  - Gastrointestinal Conditions
  - Cardiac Conditions
  - Skeletal/Orthopedic Conditions
  - Incontinence Management (colostomy care)
  - Assisting and Performing Self Care Skills with Patients; Facilitating Functional Gains of Each Patient
  - Functional Mobility and Ambulation
  - Bowel and Bladder Training of Patients
  - Identification of Skin Impairments and Prevention
  - Identification of Patient Change in Condition
  - Monitoring of Cardiovascular Changes Such as Vital Signs, Endurance, Level of Consciousness
  - Breathing Patterns and Respiratory Function
  - Pain Management
  - Positioning of Patients for Correct Body Alignment
  - Monitor Blood Pressure of Patients
  - Operate Safety Devices with Patient
  - Activities of Daily Living
  - Conduct Range of Motion Exercises with Patient
  - Patient Care of Foot and Hand
  - Infection Control
  - Charting
  - Colostomy Care
  - Hazardous Waste Handling
Isolation Techniques
- Safe Patient Handling
- Use of the Call Light System
- Safe Linen Handling
- Equipment/Modalities
- Therapeutic Safety
- Proper Use of Exercise Equipment
- Therapeutic Activities
- Therapeutic Exercises
- Assistive Devices
- Procedures for Temperature Check for Hydrocollator/Paraffin

**COMPUTER SKILLS**
- Electronic Medical Records Application Skills
- Patient Services Billing Software
- Electronic Tablet for Bedside Charting

**CONTINUOUS IMPROVEMENT**
- Administration
- Medical Records
- Customer Service
- Communication Skills
- Problem Analysis and Problem Solving
- Clinical Services System Management
- Interdepartmental Collaboration
- Interdisciplinary Team
- Incident/Accident Management
- Resident Centered Care
- Mobility Skills
- Documentation
- Continuous Quality Improvement Workshop
- Culturally Appropriate Care
- Team Building

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.
RETRAINEE - JOB CREATION

Training Proposal for:

QVC, Inc.

Agreement Number: ET17-0401

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Reeves

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainee Job Creation Initiative Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Transportation/Logistics Goods Movement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>San Bernardino</td>
<td>Repeat Contractor:</td>
<td>Yes</td>
</tr>
<tr>
<td>Union(s):</td>
<td></td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: *175</td>
<td>U.S.: 17,000</td>
<td>Worldwide: 27,000</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>(% of total trainees)</td>
<td>7%</td>
<td></td>
</tr>
</tbody>
</table>

*Based on payroll reporting in Q4 2016 (Oct.-Dec.)

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>= Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$648,000</td>
<td>$0</td>
<td>$0</td>
<td>$648,000</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $680,000
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Imp.</td>
<td>405</td>
<td>8-200</td>
<td>$1,600</td>
<td>*$13.22</td>
</tr>
</tbody>
</table>

*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:
$13.22 per hour for San Bernardino County.

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

### Used to meet the Post-Retention Wage?
☑️ Yes ☐ No ☐ Maybe
Up to $0.22 per hour may be used to meet the Post-Retention Wage.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receiving Staff</td>
<td></td>
<td>40</td>
</tr>
<tr>
<td>Put Away Staff</td>
<td></td>
<td>40</td>
</tr>
<tr>
<td>Pre-Receiving Staff</td>
<td></td>
<td>20</td>
</tr>
<tr>
<td>Picking Staff</td>
<td></td>
<td>35</td>
</tr>
<tr>
<td>Yard Jockey</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Packing Staff/Material Supply Staff</td>
<td></td>
<td>53</td>
</tr>
<tr>
<td>Shipping Staff</td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>Smart Automation Staff</td>
<td></td>
<td>16</td>
</tr>
<tr>
<td>Inventory Control Staff</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Pack Auditor</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Return to Stock Staff</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Non Customer Orders Staff</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Manifesting Staff</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Bagger (Poly/Auto)</td>
<td></td>
<td>20</td>
</tr>
<tr>
<td>Universal Sorter</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Returns Staff/Cancellations Staff</td>
<td></td>
<td>93</td>
</tr>
<tr>
<td>Multi Line Staff</td>
<td></td>
<td>10</td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1986, QVC, Inc. (QVC) is a leading television and ecommerce retailer of consumer goods including beauty products, apparel, electronics, kitchenware, jewelry and more. QVC is headquartered in West Chester, Pennsylvania, and has multiple call centers and distribution centers in the United States. The Company is eligible for standard retraining as a provider of products/services to customers located inside and outside of California.

Retrainee - Job Creation

QVC recently opened its first West Coast distribution center (www.distributionbyqvc.com) in Ontario, to better serve its customers throughout the western region. The 1 million square foot facility is expected to reduce delivery times significantly by eliminating days from traditional transit times. The Company anticipates the facility will house approximately 500 employees by 2018, and another 500 by 2020.

Hiring began shortly before the facility’s “grand opening” in August 2016. The Company had 175 employees reported on payroll in California by the end of 2016. In this proposal, QVC has committed to hiring 405 employees to work at the new facility, during the term of contract and within the Job Creation timeframe. This is the population of trainees in Job Number 1.

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

As a start-up location, the Ontario facility will require a steady sequence of hiring employees into full-time positions, for every aspect of its operation. The initial hiring phase took place from July through December. Another phase will begin soon. The Company is projecting that units shipped from the new distribution center will nearly double by 2018. Several high-technology pieces of equipment have been installed, with additional technology/machinery expected to come online well into 2017 and beyond. QVC’s investment in new equipment already exceeds $85 million. This includes conveyor systems, electric pallet jacks, stock pickers, forklifts, and dock locks. The Company is also launching a new warehouse management system, tablets, and other handheld equipment.

Training Plan

The proposed training is designed to help QVC maximize efficiencies and ensure that its new distribution center is poised to accommodate increasing volume. Most trainees are expected to receive at least two weeks of training. However, some occupations may require additional hours of instruction, depending on their respective job duties. Training will be delivered at the Ontario facility by in-house subject matter experts, and outside training vendors to be identified during the contract term. Only classroom training will be funded by ETP.

Business Skills (5%) – Training will be offered to all occupations and will help employees improve communication, inventory control, and project management skills. Trainees will learn to perform tasks more efficiently, and interact more effectively with internal and external customers.
**Commercial Skills** (65%) – Training will be offered to all occupations. This training will focus on the distribution and warehousing skills needed to effectively receive, process, and ship products.

**Computer Skills** (10%) – Training will be offered to all occupations. Employees will learn the features and functionality of the Company’s warehouse management system and handheld equipment. This training will enhance productivity by teaching workers how to manage data, process orders, resolve problems, and perform tasks at a high level of efficiency.

**Continuous Improvement** (20%) – Training will be offered to all occupations. These modules are intended to maximize output by placing emphasis on process improvements, problem solving, frontline leadership, and team building.

**Commitment to Training**

The Company estimates that it has spent approximately $197,750 on training in California thus far. Company-funded training has consisted of functional warehouse skills, as well as basic computer and equipment training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. QVC is fully committed to the professional development of its employees and plans to incorporate the successful elements of the proposed training into its ongoing training efforts.

➢ Training Infrastructure

QVC’s lead trainer at the Ontario facility played a central role in the development of the training plan, and has begun assembling the necessary on-site support team to manage training scheduling, tracking, and reporting. The Company also intends to utilize various train-the-trainer techniques to facilitate skills development during the ramp up of personnel. Training will be rolled out in phases in keeping with new employee recruitment.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

Intelligrated in Ontario will provide Commercial Skills (Conveyor Operation) training. 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**
- Inventory Control
- Time Management
- Project Management
- Communication Skills

**COMMERCIAL SKILLS**
- Distribution Equipment Skills
- Order Picking
- Packing
- Transporting
- Receiving
- Pre-Receiving
- Returns
- Shipping
- Material Handling
- Forklift and Hand Truck Operation
- Conveyor Operation
- Dock Safety*
- Trailer Safety*
- Pallet & Skid Building Techniques
- General Warehouse Safety*

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

**COMPUTER SKILLS**
- Warehouse Management System
- Scheduling System
- RF Scanners
- Tablets/Handheld Equipment

**CONTINUOUS IMPROVEMENT**
- Decision Making
- Process Improvement
- Six Sigma
- Leadership Skills for Frontline Workers
- Teambuilding
- Ergonomics
- Problem Solving

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
Critical Proposal
Retrainee – Job Creation
Training Proposal for:
The Boeing Company

Agreement Number: ET17-0404

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood
Analyst: M. Paccerelli

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Critical Proposal Retrainee Job Creation Initiative Priority Rate</th>
<th>Industry Sector(s): Manufacturing Aerospace and Defense</th>
<th>Priority Industry:</th>
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<th>No</th>
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</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Los Angeles, Orange</td>
<td>Repeat Contractor:</td>
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<td>Yes</td>
<td>No</td>
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<tr>
<td>Union(s):</td>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 14,864 U.S.: 135,793 Worldwide: 156,921</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>4%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>(% of total trainees)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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</table>

FUNDING DETAIL

\[
\text{Program Costs} - \text{(Substantial Contribution)} - \text{(High Earner Reduction)} = \text{Total ETP Funding}
\]

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>$386,300</th>
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</thead>
<tbody>
<tr>
<td>(Substantial Contribution)</td>
<td>$53,125 (15% Job 1)</td>
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<tr>
<td>(High Earner Reduction)</td>
<td>$0</td>
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<tr>
<td>Total ETP Funding</td>
<td>$333,175</td>
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</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $901,600
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>A/Class / Lab</th>
<th>CBT</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine Priority Rate</td>
<td>Adv. Technology, Computer Skills, Commercial Skills</td>
<td>425</td>
<td>8-200</td>
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<td></td>
<td>$703</td>
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</tr>
<tr>
<td>2</td>
<td>Retraine Job Creation Initiative Priority Rate</td>
<td>Adv. Technology, Computer Skills, Commercial Skills</td>
<td>43</td>
<td>8-200</td>
<td>0-40</td>
<td></td>
<td>$800</td>
<td>$24.00</td>
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<tr>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
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<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** Job Number 1: $16.96 per hour for Los Angeles County and $17.22 per hour for Orange County. Job Number 2 (Job Creation): $14.13 per hour for Los Angeles County and $14.35 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

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineer</td>
<td>468</td>
<td></td>
</tr>
</tbody>
</table>

**Critical Proposal**

This project has been designated a Critical Proposal by the Governor's Office of Business and Economic Development based on Boeing's plan to expand its business capacity in California by adding several hundred new high-skilled, high-wage engineering jobs in 2017.

**INTRODUCTION**

The Boeing Company (Boeing) ([www.boeing.com](http://www.boeing.com)) is a manufacturer of commercial jetliners and military aircraft. Boeing also designs and manufactures defense systems, satellites, and launch vehicles. The Company's customers include most domestic and international airline carriers, NASA, and all branches of the military.

The proposed training will be provided to employees of Boeing's Southern California Design Center (SCDC) in Long Beach and Seal Beach. The SCDC consists of the Commercial Aviation Services (CAS), which includes the following businesses: Customer Support Engineering, Modifications and Freighter Conversions, and Fleet Services. Additionally, the SCDC encompasses the business of Production Airplane Programs and Core Engineering activities.
PROJECT DETAILS

The SCDC recently received a comprehensive work statement to provide full customer engineering support for the in-production 787 airplane. To support this effort, the SCDC need to add more Engineers, new hires and incumbents. Some incumbent Engineers are at risk of layoff due to changes in the economic climate in aerospace, primarily defense. This new work statement requires different tools and processes to support the 787. Workers require extensive training.

Currently, the SCDC provides support for the DC-8, DC-9, DC-10, MD-11, MD-80/-90, 707, 717, 727, 757 models and plans to support the Next-Generation 737, 747, 767 and 777 models as well as commercial product support for the KC-46 Tanker and P-8. Advanced training in airplane technologies, tools, and processes is required to support these work statements.

The goal of this training proposal is the development of teams able to support current and new work statements, specifically those based on support or design of Boeing's 7-series products. The expected outcome of training is a team of employees with engineering skills to work independently or semi-independently (under supervision). Additionally, Engineers are expected to have working knowledge of the configuration management process and tools to apply them correctly.

Boeing anticipates strong growth in commercial aviation over the next several years and increasing internal capability and capacity to meet the expected demand for commercial airplanes and related service. The expansion will allow Boeing to streamline processes and develop common practices by establishing a single location for airplane support.

This will be Boeing's ninth ETP Agreement and second within the last five years. Training will be provided to newly-hired staff who have not participated in the prior ETP projects. Some trainees who participated in previously provided ETP-funded training will continue training in other course offerings. Training will focus on 787 customer engineering which was not provided in prior projects.

Retrainee - Job Creation

In 2016, the Company completed the refurbishment of its facilities in Seal Beach to accommodate a new, state-of-the-art Boeing Operations Center (BOC). The BOC is designed to address customer needs (24-hours a day, 7 days a week, 365 days per year), and provide services for both McDonnell Douglas heritage airplanes and the newly added Boeing 7-series.

To staff this new facility, Boeing has committed to hiring 43 new employees (Job Number 2). New Engineers will undergo extensive training alongside incumbent Engineers to develop the requisite skills to facilitate the Company’s expansion.

Training for newly hired employees will be reimbursed at a higher rate, and trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Trainees' date-of-hire will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Advanced Technology (60%): AT will be provided to Engineers. Although the trainees possess degrees in accredited course study in engineering, computer science, mathematics, physics or chemistry; many of the new advanced analysis and design skills needed to work specifically on the Boeing 7-series models are not taught in universities and are not currently among the trainees' skills set.
AT will be reimbursed at a higher rate given it is delivered in highly technical learning environments, includes special curricula, expensive training materials, high-end equipment, and certified training personnel. The trainer-to-trainee ratio is 1:10 to allow for in-depth coverage and personal attention from the instructor.

Computer Skills (30%): While the content of this curriculum is the same as AT courses, it will be classified as Computer Skills for the purpose of lower reimbursement rate because training will exceed the required AT trainer-to-trainee ratio of 1:10.

Commercial Skills (10%): Training will be offered primarily to newly-hired Engineers, which includes Airplane Certification, Airplane Flight Test, Airplane Structures and Systems, Aviation Safety and Airplane Certification. Training will be provided via classroom and Computer-Based Training (CBT). CBT will supplement the trainees’ class/lab training and is capped at 50% of the total training hours per trainee.

Substantial Contribution

Boeing is a repeat contractor with anticipated earnings in excess of $250,000 at the Long Beach and Seal Beach facilities within the past five years (see Active Project Table below). Accordingly, reimbursement for trainees at these facilities in Job Number 1 will be reduced by 15% for this project, to reflect the company’s $53,125 Substantial Contribution (SC) to the cost of training. The Substantial Contribution requirement is waived in Job Number 2 for Retrainees – Job Creation trainees as SC is not applicable to Job Creation.

Commitment to Training

Boeing’s current training budget is approximately $17.5M. The Company provides many training opportunities through its Learning, Training and Development (LTD) services. Ongoing training consists of new employee orientation, technical skills development, and soft skills enhancement through team building and leadership 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 delivered by in-house subject matter experts. For project administration, Boeing has identified specific members of its Engineering Operations Staff to ensure that training and documentation adheres to ETP requirements. As a repeat ETP contractor, the Company has well-established internal administrative procedures using Boeing LTD, an established service that provides standardization, enrollment, training, and tracking services.

Electronic Recordkeeping

Boeing will use its Learning Management System to document training. Staff has reviewed and approved the system.

RECOMMENDATION

Staff recommends approval of this proposal.
ACTIVE PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
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<tbody>
<tr>
<td>ET15-0381</td>
<td>$747,484</td>
<td>1/26/15 – 1/25/17</td>
<td>347</td>
<td>781</td>
<td>683</td>
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</table>

Boeing’s projected performance is 90% based on the total reimbursable hours of 37,756 entered into the ETP Online System. This will result in projected earnings of approximately $672,908. The remaining trainees are expected to complete the retention period by January 2017, at which time, Boeing will submit the Final Closeout Invoice.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 200
Trainees may receive any of the following:

ADVANCED TECHNOLOGY
- B01 Electrical Engineering
- B02 Propulsion
- B03 Mechanical and Structures Engineering
- B04 Airplanes and Systems Engineering
- B05 Tools and Processes
- B06 Regulatory Compliance Training
- B07 Payloads

COMPUTER SKILLS
- B11 Electrical Engineering
- B12 Propulsion
- B13 Mechanical and Structures Engineering
- B14 Airplanes and Systems Engineering
- B15 Tools and Processes
- B16 Regulatory Compliance Training
- B17 Payloads

CBT Hours
0 - 40

COMMERCIAL SKILLS
- Aviation Safety 101 [.3 hours]
- Airplane Certification: Compliance with Airworthiness Regulations [.2 hours]
- TR012896 Aircraft Familiarization Overview [8 hours]
- Airline Support Manager Training [2 hours]
- Airplanes 101 - Module 1: Principles of Flight [1 hour]
- Airplanes 101 - Module 2: Airplane Requirements [1 hour]
- Airplanes 101 - Module 3: Designing an Airplane [1 hour]
- Airplanes 101 - Module 4: Airplane Structures [1 hour]
- Airplanes 101 - Module 5: Airplanes Systems [1 hour]
- Airplanes 101 - Module 6: Aviation Safety [1 hour]
- Airplanes 101 - Module 7: Airplane Flight Test [1 hour]
- Airplanes 101 - Module 8: Production and Delivery System [1 hour]
- European Aviation Safety Agency (EASA) CS25 Delegation Training [1.5 hours]
- EASA Post Type Validation Guidelines [2 hours]
- Major/Minor Training for New DAEs (Class 2 Struct) [0.5 hours]
- Regulatory Administration Guidance and BPM Knowledge [1 hour]
- Authorized Representative Authority [1 hour]
- Major Minor Process [3 hours]
- Test Witnessing [0.5 hours]
- Conformity [0.5 hours]
- Notification of Authorized Representative Travel to Other Countries to perform Organization Designation Authorization (ODA) functions [0.5 hours]
- Compliance Summary Report Guidelines [1 hour]
- Undue Pressure & ODA Unit Member Independence [0.5 hours]
- CP101 – Process Overview: Certification Plans [0.5 hours]
- CP204 – Certification Plan Process Roles: Authorized Rep [0.5 hours]
- CP310 – Certification Plan: Method of Compliance Discussion [1 hour]
- CP314 – Certification Plan: Technical Specialist Review [0.5 hours]
- Request for Conformity (RFC) System Training Web Single Sign On Login [.5 hrs]
- RFC System Training for Drafter & Submitter Roles [1 hour]
- Airplane Certification: Introduction to Airplane Certification [0.2 hours]
- Airplane Certification: Roles and Responsibilities [0.2 hours]
- Airplane Certification: Project Management and Planning [0.2 hours]
- Airplane Certification: Certification Requirements [0.2 hours]
- Airplane Certification: Major/Minor Determination Process [0.2 hours]
- Airplane Certification: Certification Plans [0.2 hours]
- Airplane Certification: Compliance with Airworthiness Regulations [0.2 hours]
- Airplane Certification: Regulatory Issues Management [0.2 hours]
- Airplane Certification: Foreign Validation [0.2 hours]
- Airplane Certification: European Aviation Safety Agency [1 hour]
- Detailed FAR Part 25 for Structures [1 hour]
- Regulatory Knowledge - 14 CFR Part 21, 25, & 183 [1 hour]
- TR009659 Electrical Design Means of Compliance [2 hours]
- TR009654 Electrical Design Major/Minor Criteria Training [2 hours]

Note: Reimbursement for retraining is capped at 200 total hours per trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per trainee.
RETRAINEE - JOB CREATION
Training Proposal for:
ABC Home Health Care, LLC dba Bridge Home Health, LLC
Agreement Number: ET17-0395

Panel Meeting of: February 23, 2017
ETP Regional Office: San Diego Analyst: M. Ray

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
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<tr>
<td>SET Retraining Priority Rate Job Creation Initiative Medical Skills Training</td>
<td>Services Healthcare</td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>Yes No</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>San Diego and Alameda</td>
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<td>Repeat Contractor:</td>
<td>Yes No</td>
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<tr>
<td>Union(s):</td>
<td>Yes No</td>
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<tr>
<td>Number of Employees in:</td>
<td>CA: 338 U.S.: 338 Worldwide: 338</td>
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<tr>
<td>Turnover Rate:</td>
<td>4%</td>
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<tr>
<td>Managers/Supervisors: (% of total trainees)</td>
<td>0%</td>
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### FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
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<tbody>
<tr>
<td>$348,088</td>
<td>$0</td>
<td>$0</td>
<td>$348,088</td>
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In-Kind Contribution: 100% of Total ETP Funding Required $523,148
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SET</td>
<td>MS - Didactic, MS - Clinical with Preceptor, Computer Skills, Continuous Improvement</td>
<td>209</td>
<td>8 - 200</td>
<td>0</td>
<td>Weighted Avg: 74</td>
</tr>
<tr>
<td>2</td>
<td>Retraineet SET</td>
<td>MS - Didactic, MS - Clinical with Preceptor, Computer Skills, Continuous Improvement</td>
<td>41</td>
<td>8 – 200</td>
<td>0</td>
<td>Weighted Avg: 85</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** Modified SET Wage: $22.04  
**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 $0.04 per hour may be used to meet the Post-Retention Wage for Job Number 1 trainees only.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
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</thead>
<tbody>
<tr>
<td><strong>Job Number 1:</strong></td>
<td></td>
<td></td>
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<tr>
<td>Registered Nurse</td>
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<td>78</td>
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<tr>
<td>Licensed Vocational Nurse</td>
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<td>56</td>
</tr>
<tr>
<td>Therapist</td>
<td></td>
<td>45</td>
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<tr>
<td>Social Worker</td>
<td></td>
<td>14</td>
</tr>
<tr>
<td>Certified Nurse Assistant/Home Health Aide</td>
<td></td>
<td>16</td>
</tr>
<tr>
<td><strong>Job Number 2:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registered Nurse</td>
<td></td>
<td>14</td>
</tr>
<tr>
<td>Licensed Vocational Nurse</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Therapist</td>
<td></td>
<td>9</td>
</tr>
<tr>
<td>Social Worker</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Certified Nurse Assistant/Home Health Aide</td>
<td></td>
<td>4</td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 2009, ABC Home Health Care, LLC dba Bridge Home Health, LLC (Bridge Home Health) (www.bridgehh.com) provides home-based patient care services for skilled nursing, rehabilitative care, and therapy. This therapy includes physical, speech, and occupational therapy; medical, social services, activities of daily living and hospice. There are two distinct patient groups: 1) short-term, transitional rehabilitation patients, and 2) long-term, chronically-ill patients.

Headquartered in San Diego, Bridge Home Health has two facilities located in San Diego, one in Fremont, and one in San Jose. The Company’s multi-disciplinary teams provide clinical, emotional, spiritual, and social support for patients and families. All facilities are accredited by The Joint Commission, certified by Medicare, and licensed by the California Department of Public Health.

Training in this proposal will target approximately 250 incumbent and newly-hired workers at the Company’s three facilities in San Diego and Fremont.

Bridge Home Health is eligible for ETP funding under Special Employment Training (SET) provisions for frontline workers. The Company qualifies for ETP’s Priority Industry reimbursement as a healthcare employer.

PROJECT DETAILS

Bridge Home Health’s patients are typically referred from acute care hospitals and managed care organizations such as Kaiser Permanente. The Company’s mission is to ensure that patients transition from an acute care setting to a home setting is safe, effective, and successful. The Company’s hospice care services focuses on providing patients with exceptional care with an emphasis on comfort, dignity, and compassion.

Bridge Home Health representatives report that implementation of the Affordable Care Act (ACA), and Centers for Medicare & Medicaid Services (CMS) regulations, require providers to deliver better patient care at lower costs. These regulations have changed the industry’s business model. Today, more and more acute care hospitals are encouraged to release patients earlier to reduce cost of care.

As a result, the volume of referrals from acute care hospitals and physician groups has been steadily growing. Indeed, in-home care has become an integral component of the post-hospitalization recovery process, specifically, during the initial weeks subsequent to discharge. The Company’s growth is also fueled by changes in Medicare reimbursement, allowing chronically-ill patients to receive in-home services. These changes reflect the awareness that in-home care is cost-effective, as compared to hospitalization.

Furthermore, there is an increase in demand for home health services from aging baby boomers and the geriatric population. For example, baby boomers are increasingly undergoing elective surgery for joint replacement, which requires rehabilitation at home; and geriatric patients are undergoing complex surgical procedures that require post-acute care at home.

To successfully support its current growth, and in anticipation of future patient needs, Bridge Home Health has developed a strategic plan to expand services. Bridge Home Health recently began providing new services in palliative care at its San Diego facility, and is developing a palliative care Program to be implemented in all facilities. This new specialized service will
expand the Company’s focus into providing patients relief from symptoms of a serious illness such as cancer, congestive heart failure, or chronic obstructive pulmonary disease.

The Company has committed to hire, train, and retain an adequate supply of healthcare workers to meet the aforementioned demands. However, there is a relatively small pool of healthcare professionals in the skilled nursing and hospice industry, which has prompted the Company to provide increased levels of training for the Company’s entire workforce.

Training Plan

Medical Skills Training (70%)

In this proposal, approximately 250 nurses and other professional allied healthcare staff including Nurse Assistants/Home Health Aides will participate in clinical skills training. All trainees will receive one or both didactic and clinical preceptor training.

With the Company’s ongoing and future growth, Bridge Home Health has established a Medical Skills program that will focus on improving clinical outcomes and advanced skill levels to provide superior care to higher-acuity patients. This program is designed to foster a supportive environment in which caregivers at all skill levels can become clinically competent and emotionally prepared to function in their specific roles.

Clinical Preceptor training is critical to ensure healthcare workers have hands-on skills, prior to being assigned their own patients. The preceptor-led training is designed to maximize patient satisfaction and safety.

All trainees will also 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 specifically in the home-based environment.

The Panel has established a reimbursement rate ($22 per hour) for nurse upgrade training, recognizing the higher cost of delivery for the Clinical with Preceptor model. This blended rate will apply to both the Didactic and Clinical with Preceptor modes of delivery. The standard class/lab rate for priority industries ($18 per hour) will apply to Computer Skills and Continuous Improvement training.

Computer Skills (10%)

Training will be offered to all job occupations. Course topics include Clinical Services System Management, Electronic Medical Records Application Skills, ICD10, Consolo, and Intermediate and Advanced Microsoft Office Suite. Training will provide trainees with skills necessary to effectively connect with patients through technology. Kinnser training will allow workers to improve efficiency, communication, and coordination of care of patients.

Continuous Improvement (20%)

Training will be provided to all job occupations. Training topics include Communication Skills, Coordination of Care, 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, as well as increase effective problem solving abilities.
Retraineep - Job Creation

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

With the increase patient population and expansion of its services mentioned above, the Company has committed to hiring 41 new nurses and other allied healthcare workers. (14 RNs, 10 LVNs, 9 Therapists, 4 Social Workers, and 4 Certified Nurse Assistant/Home Health Aides) (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.

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 $25,000 for all training including onboarding, annual compliance, and skills competency.

➢ Training Infrastructure

Bridge Home Health plans to contract with an administrative subcontractor to assist with ETP project administration. In addition, the Company has designated each facility’s Area Director of Clinical Operations to collaborate with the Director of Nursing to oversee the training program as well as assign a staff member to be responsible for collecting and submitting the training rosters to the administrative subcontractor for data entry into the ETP systems.

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.

Priority Industry Wage Modification

For trainees employed in a priority industry, the Panel may modify the SET Wage up to 25% below the statewide average hourly wage. Bridge Home Health requests the wage modification from $29.38 to $22.04 for trainees in Job Number 1.

Impact/Outcome

ETP funding will substantially contribute to the Company’s efforts to strengthen training curricula and train current staff to increase their 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 and will be able to retain them long-term.

RECOMMENDATION

Staff recommends approval of this proposal.
DEVELOPMENT SERVICES

Bridge Home Health retained National Training Systems, Inc. (NTS) in Ladera Ranch to assist with development of this proposal for a flat fee of $19,939.

ADMINISTRATIVE SERVICES

NTS will also perform administrative services in connection with this proposal for an amount not to exceed 10% of payment earned.

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

**MEDICAL SKILLS TRAINING – 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 Pleurx 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 gases and drugs
• Tracheotomy Care
• Urinary Management (Foley Catheter, Input/Output)
• Wound Management
• Wound Vacuum-Assisted Closure (VAC) Therapy

MEDICAL SKILLS TRAINING – CLINICAL W/ PRECEPTOR

• Rehabilitative Services
  o Patient Assessment & Care
  o Dementia Care
  o Diabetic Management
  o Enteral Feeding Tube Management
  o Equipment Skills
  o Infection Control
  o Intravenous (IV) Therapy
  o Medication Administration & Management
  o Rehabilitation Skills

• Therapy Services
  o Body Mechanics
  o Functional Mobility & Ambulation
  o Infection Control
  o Neurological Conditions
  o Occupational Therapy Skills
  o Orthopedic Conditions
  o Patient Assessment & Care
  o Physical Therapy Skills
  o Rehabilitation Skills
  o Speech Therapy Skills

COMPUTER SKILLS

• Clinical Services System Management
• Electronic Medical Records Application Skills
• Kinnser
• ICD10
• Consolo
  o OASIS
• MS Office Suite Skills (Intermediate & Advanced only)
  o Word
  o Excel
  o PowerPoint
CONTINUOUS IMPROVEMENT

- Communication Skills
- Coordination of Care
- Customer Service
- Documentation Skills
- Interdisciplinary Team Process
- National Patient Safety Goals
- Problem Solving
- Team Building
- Quality Assessment and Improvement

Note: Reimbursement for retraining is capped at 200 total training hours, per trainee, regardless of the method of delivery.
Glanbia Nutritionals (NA), Inc.

WITHDRAWN
RETRAINEE - JOB CREATION
Training Proposal for:
Orora Packaging Solutions
Agreement Number: ET17-0415

Panel Meeting of: February 23, 2017
ETP Regional Office: San Diego        Analyst: J. Davey

PROJECT PROFILE

<table>
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<tr>
<th>Contract Attributes:</th>
<th>Priority Rate Retraine, Job Creation Initiative</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
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<tr>
<td>Counties Served:</td>
<td>Alameda, Los Angeles, Orange, San Diego, Ventura, Fresno, Napa, Placer, San Bernardino, San Joaquin, San Luis Obispo</td>
<td>Repeat Contractor:</td>
<td>Yes</td>
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<tr>
<td>Union(s):</td>
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<td>No</td>
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<tr>
<td>Number of Employees in:</td>
<td>CA: 1,401</td>
<td>U.S.: 2,240</td>
<td>Worldwide: 6,100</td>
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<tr>
<td>Turnover Rate:</td>
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<tr>
<td>Managers/Supervisors:</td>
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FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
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<tbody>
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<td>$749,600</td>
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In-Kind Contribution: 100% of Total ETP Funding Required $1,567,228
### TRAINING PLAN TABLE

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<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>Retraine Priority Rate</td>
<td>Business Skills, Computer Skills, Continuous Improvement, HazMat, Mgmt. Skills, Mfg. Skills, PL-Computer Skills, Advanced Technology</td>
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<td>8-200</td>
<td>0</td>
<td>$720</td>
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<td>2</td>
<td>Retraine Priority Rate</td>
<td>Business Skills, Computer Skills, Continuous Improvement, HazMat, Mgmt. Skills, Mfg. Skills, PL-Computer Skills, Advanced Technology</td>
<td>37</td>
<td>8-200</td>
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<td>$800</td>
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<tr>
<td></td>
<td>Retraine Priority Rate</td>
<td><strong>Job Creation Initiative</strong></td>
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<td>Weighted Avg: 40</td>
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</table>

*It will be made a condition of contract that the trainees in Job Numbers 1 & 2 will never be paid less than the State or local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

**Minimum Wage by County:**  
- **Job Number 1:** Alameda County: $17.63/hr.; Los Angeles County: $16.96/hr.; Orange County: $17.22/hr.; San Diego County: $16.72/hr.; Sacramento County: $16.46/hr.; Fresno, Monterey, Napa, Placer, San Bernardino, San Joaquin, San Luis Obispo and Ventura Counties: $16.16/hr.  
- **Job Number 2:** Alameda County: $14.69/hr.; Los Angeles County: $14.13/hr.; Orange County: $14.35/hr.; San Diego County: $13.94/hr.; Sacramento County: $13.72/hr.; Fresno, Monterey, Napa, Placer, San Bernardino, San Joaquin, San Luis Obispo and Ventura Counties: $13.22/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 $5.23 per hour may be used to meet the Post-Retention Wage (Job 1), and up to $3.41 per hour (Job 2).

**Other Compensation:** Sales Staff may earn commissions ranging from $8.98 to $17.63 per hour to meet or exceed the ETP minimum hourly wage.

**The Company is not in Retail trade. As such, occupations paid by commission do not fall under the Panel’s “Lowest Priority” for FY2016/17.**
**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1 – Retrainee</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration/Support Staff - 1</td>
<td>108</td>
<td></td>
</tr>
<tr>
<td>Administration/Support Staff - 2</td>
<td>112</td>
<td></td>
</tr>
<tr>
<td>Customer Service Staff</td>
<td>52</td>
<td></td>
</tr>
<tr>
<td>Information Technology Staff – 1</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Information Technology Staff – 2</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Managers – 1</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Managers – 2</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>Manufacturing Staff/Shipping – Receiving Staff – 1</td>
<td>388</td>
<td></td>
</tr>
<tr>
<td>Manufacturing Staff/Shipping – Receiving Staff – 2</td>
<td>158</td>
<td></td>
</tr>
<tr>
<td>Sales Staff</td>
<td>77</td>
<td></td>
</tr>
<tr>
<td><strong>Job 2 – Retrainee, Job Creation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration/Support Staff - 1</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Customer Service Staff</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Information Technology Staff</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Manufacturing Staff/Shipping – Receiving Staff</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Managers</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Orora Packaging Solutions (OPS), formerly known as Orora North America (ONA) was incorporated in 2013 after the re-organization of Amcor Packaging (USA), Inc. (Amcor). Earlier this year the Company changed its name to Orora Packaging Solutions to better reflect its business line. OPS is a nationwide manufacturing, distribution and logistics company. The Company manufactures corrugated paper products, packing material, janitorial products, shipping supplies, and custom-built corrugated packaging and industrial packaging products. OPS is headquartered in Buena Park. The Company has 21 facilities and employs over 1,400 workers in California.

OPS also maintains operations throughout the United States and Mexico and sells its products to a variety of large and small industries and companies, including Hewlett Packard, Boeing, and Unisys. The Company is eligible for standard, retraining funding at the priority-industry rate as NAICS identified manufacturer.

OPS strives for continuous improvement, such as through the implementation of an SAP ERP system. This new system has already been installed at Orora’s international locations and is set to “go live” at the Company’s California facilities in April 2017.

In addition, the Company continues to enter new markets and develop new products to maintain and improve its position in its industry.
This new ERP system will impact virtually every process. The system will require workers to understand their jobs in a new way, as the system redefines roles and responsibilities. Training will focus on implementing the new system, and integrating new team members.

**PROJECT DETAILS**

In its previous ETP project, OPS provided many of the same skills identified below. However, training in this project will be delivered to newly-hired staff and to those employees who did not receive training in the skills during its previous project.

**Substantial Contribution**

Orora Packaging Solutions is a repeat contractor (as Orora North America) with payment earned in excess of $250,000 for all 21 California facilities combined within the past five years. However, no single facility earned in excess of $250,000. Therefore, the substantial contribution assessment does not apply.

**Training Plan**

Training will take place at the company’s 21 California facilities throughout the state. As noted earlier, it will focus on implementation of the new SAP/ERP system, and changes the system brings to the way workers function in their jobs.

**Advanced Technology**

OPS requests reimbursement at the Advanced Technology rate of $26 per hour for CAD/CAM, Adobe Design Software, and Adobe Illustrator Computer Skills training. These skills will be delivered to Designers (Administrative Staff) who have the necessary experience and aptitude to learn these advanced skills. OPS reports that the hourly cost of training for these skills is $28 to $38 per hour. OPS understands that the trainer-to-trainee ratio is 1:10 for AT, to allow in-depth coverage and personal attention from the instructor.

**Business Skills** (15%): Training will be provided to all occupations in the following areas: Communication, Project Management, Sales Leadership, and Voice of the Customer. This training will support the Company’s growth strategies and provide the foundation in subjects such as communication skills, customer service and value plus that will provide important foundation skills in the ONA culture.

**Computer Skills** (40%): Training will be provided to all occupations. Training will focus on the new ERP system. However, trainees will also receive skills such as Pocket Margin Profitability Database, Salesforce.com, and CRM (Customer Relationship Management) System. These skills will enable trainees to better perform their jobs.

**Continuous Improvement Skills** (20%): Training will be provided to all occupations. Change Management will be emphasized to help the Company establish a culture that will support innovation and growth and cope with changes during the rollout of the ERP system. New employees will receive training in leadership, problem-solving/conflict-resolution, process improvement, and supply chain management. These skills will also enable the workforce to perform more effectively in team environments, improve and implement new working processes, improve leadership capabilities, and increase product/process quality.
**Certified Safety Training**

**Hazardous Materials (5%)**: This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The certified series of courses varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” In this proposal, training will be provided to Manufacturing Staff/Shipping – Receiving Staff and respective Managers in topics related to the safe handling, shipping/receiving and disposal of hazardous materials. No industry certification will be earned after training is completed.

**Management Skills (5%)**: Training will be provided to Managers in topics related to Change Management, Leadership, Financial Management, Teambuilding and other related skills. Training will enable Managers to understand their leadership roles in the organization, lead and direct staff and perform more effectively in their jobs.

**Manufacturing Skills (10%)**: Training will be provided to Manufacturing Staff/Shipping – Receiving Staff and respective Managers in topics related to Manufactured Packaging Products (MPP), Equipment Set-Up/Operation, Product Manufacturing and other related skills. Training will enable staff to understand manufacturing requirements, eliminate errors, and perform more effectively in the manufacturing environment.

**Productive Laboratory**

**PL-Computer Skills (5%)**: 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, and special attendance rosters will be used to assist in monitoring.

PL training will be provided to Administrative Staff, Customer Service, Manufacturing Staff/Shipping – Receiving Staff, Sales, and Managers. Training will focus on the new ERP system. However, trainees will also receive skills such as Pocket Margin Profitability Database, Salesforce.com, and CRM (Customer Relationship Management) System. A maximum of 40 hours per trainee will be delivered with a trainer-to-trainee ratio of 1:1.

The hands-on learning will provide the best way to verify competency in the use of the new ERP system and digital printer use. Troubleshooting by the trainer can be conducted in real time and will minimize errors, ensure proper use of equipment and/or software, and minimize potential for misuse or damage to these costly tools. Because trainers will be monitoring live interactions with customers they will be able to provide immediate feedback and corrective action.

**Retrainee - Job Creation**

OPS is hiring 37 additional staff to support the ERP implementation. OPS intends to absorb all employees back into the operational areas when the project eventually winds down. These new workers represent the net new hires OPS is committed to training under this project (Job Number 2).

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. To be eligible for reimbursement, the trainees must be hired within the three-month period prior to Panel approval or during the term of contract.
Commitment to Training

OPS represents that ETP funds will not displace the existing financial commitment to training. The Company’s current training budget is $130,000 for ongoing training that includes basic job skills, new employee orientation, anti-harassment/diversity, introductory computer skills, ethics, performance management skills, and basic safety skills. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

OPS’s management team includes the Manager of Talent Development whose job is to determine the Company’s training needs and ensure that the learning structure can support ongoing employee development. The Company’s Chief Information Officer manages the day-to-day rollout and implementation of the SAP/ERP system and the training activities surrounding the rollout. Two additional internal staff with ETP program experience will be working with California Manufacturing Technology Consulting to ensure proper and timely administration.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by OPS under ETP Agreements that were completed within the last five years when it was still part of Amcor:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0286</td>
<td>Statewide</td>
<td>9/1/14 – 8/31/16</td>
<td>$624,448</td>
<td>$624,448 (100%)</td>
<td></td>
</tr>
<tr>
<td>ET12-0166</td>
<td>Statewide</td>
<td>11/21/2011–11/20/2013</td>
<td>$153,900</td>
<td>$122,178 (79%)</td>
<td></td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

California Manufacturing Technology Consulting (CMTC) in Torrance assisted with development of this proposal. [Note: CMTC is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000. In this proposal, the fee will be $15,000. This fee does not affect the approved amount of funding.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours  
8-200  
Trainees may receive any of the following:

BUSINESS SKILLS
- Communication Skills
- Customer Service Skills
- Procurement Skills
- Accounting Skills
- Time Management Skills
- Customer Relationship Management Skills
- Project Management Skills
- Business Writing Essentials
- Managing Conflict
- Effective Presentations
- Sales Force Excellence/Effectiveness
- Train the Trainer for Sales Cycles
- Sales Leadership
- Sales Business Improvement
- Pocket Margin Profitability Skills
- Next Generation Product Knowledge Skills

COMPUTER SKILLS
- Enterprise Resource Planning (ERP) System Skills – SAP
- Top Gun Inventory Control System Skills
- Orora Production Control System
- Pocket Margin Profitability Database Skills
- Salesforce.com Customer Relationship Management (CRM) System Skills
- Orora Distribution System Skills
- Microsoft Office – Intermediate/Advanced

CONTINUOUS IMPROVEMENT
- Research and Development/Product Design
- Lean Operations Skills
- Problem Solving/Conflict Resolution Skills
- Process Improvement Skills
- Quality Assurance Skills
- Sustainability Skills

HAZARDOUS MATERIALS
- HazMat Skills

MANUFACTURING SKILLS
- Manufactured Packaging Products (MPP) Quality Processes
- Equipment Set Up/Operation
- Product Manufacturing
- Equipment Operation
- Electrical Safety
- Fire Safety
Safety Training is capped at 10% of a trainee’s total training hours

**MANAGEMENT SKILLS (Management trainees only)**
- Change Management
- Leadership Skills
- Conflict Resolution Skills
- Leading Effective Meetings
- Teambuilding Skills
- Change Management Skills
- Financial Management Skills
- Supply Chain Management

**ADVANCED TECHNOLOGY (limited ratio 1:10)**
- CAD/CAM
- Adobe Creative Cloud
- Adobe Captivate

**PL Hours**
0 – 40

**COMPUTER SKILLS (limited ratio 1:1)**
- SAP
- Digital Printer

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 40 hours per-trainee.
December 1, 2016

Employment Training Panel
San Diego Field Office
5353 Mission Center Road
San Diego, CA 92108-1350

Re: Application to Employment Training Panel for Orora Packaging Solutions

Dear Ms. Torres:

Teamsters Local 63 represents employees at Orora Packaging Solutions manufacturing operation in Southern California. Our union supports the training of the workforce as it improves upon the skills of the workers we represent. Therefore, Teamsters Local 63 supports Orora Packaging Solutions application for funding from the Employment Training Panel.

Best regards,

Carlos Barnett
Business Representative
Teamsters Local No. 63

CB/Is
December 6, 2016

Employment Training Panel
San Diego Field Office
9246 Lightwave Ave., Bldg. A, Ste. 300
San Diego, CA 92121

Re: Application to Employment Training Panel for Orora Packaging Solutions

Dear Ms. Torres:

The Teamsters District Council 2 Local 388M represents employees at Orora Packaging Solutions' manufacturing operation in Southern and Northern California. Our union supports the training of the workforce as it improves upon the skills of the workers we represent. Therefore, Teamsters District Council 2 Local 388M supports Orora Packaging Solutions' application for funding from the Employment Training Panel.

Best Regards,

Tony Correll
Senior Executive Representative
RETRaineE - JOB CREATION

Training Proposal for:

Fox Factory, Inc.

Agreement Number: ET17-0434

Panel Meeting of: February 23, 2017

ETP Regional Office: San Francisco Bay Area  Analyst: L. Molinar

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Priority Rate Retraining Initiative HUA Veterans</th>
<th>Industry Sector(s): Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Santa Cruz, San Diego</td>
<td>Repeat Contractor: Yes</td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 648  U.S.: 838  Worldwide: 1,217</td>
<td>Turnover Rate: 5%</td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>4% (% of total trainees)</td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

\[
\text{Program Costs} - \text{(Substantial Contribution)} - \text{(High Earner Reduction)} = \text{Total ETP Funding}
\]

\[
\begin{align*}
\text{Program Costs} & = 350,040 \\
\text{(Substantial Contribution)} & = 0 \\
\text{(High Earner Reduction)} & = 0 \\
\text{Total ETP Funding} & = 350,040 \\
\end{align*}
\]

In-Kind Contribution: 100% of Total ETP Funding Required $414,248
### Training Plan Table

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
</table>

*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 and 3: $16.72 per hour for San Diego County and $16.16 per hour for Santa Cruz County. Job Numbers 2 and 4 (Job Creation): $13.94 per hour for San Diego County and $13.22 per hour for Santa Cruz 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

Health benefits of up to $4.16 per hour for Job Numbers 1 and 3 and up to $1.94 per hour for Job Numbers 2 and 4 may be used to meet the Post-Retention Wage.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Staff</td>
<td></td>
<td>26</td>
</tr>
<tr>
<td>Production Staff</td>
<td></td>
<td>337</td>
</tr>
<tr>
<td>Designer/Drafter/IT Staff</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>Engineers</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>Management Staff 1</td>
<td></td>
<td>8</td>
</tr>
<tr>
<td>Management Staff 2</td>
<td></td>
<td>7</td>
</tr>
</tbody>
</table>
INTRODUCTION

Fox Factory, Inc. (Fox) (www.ridefox.com) was founded in 1974 and is headquartered in Scotts Valley, California. Fox designs, engineers, and manufactures high performance shock absorbers and suspension products for mountain bikes, snowmobiles, motorcycles, ATVs, UTVs, off-road trucks, SUVs, and specialty vehicles. Fox also supplies and services OEM bike and powered vehicle manufacturers, defense contractors, after-market dealers and distributors, and race teams. Fox distributes products to more than 40 countries.

The Company operates six facilities in California: two located in Scotts Valley (Corporate Headquarters and Machine Shop), three in Watsonville (Manufacturing Operations Center and two Inventory, Shipping, and Receiving Warehouses); and one in El Cajon (Manufacturing Complex for the off-road and military products). ETP-funded training will be delivered to employees from all six facilities in California.

PROJECT DETAILS

This will be Fox's second ETP Agreement, and second within the last five years. In the previous Agreement, Fox was able to modernize production and testing equipment and improve production processes. Fox also implemented an Enterprise Resource Planning (ERP) system, using Oracle software, at the El Cajon facility. This greatly improved the facility's usage of operational data and administrative load, production efficiency, and communication within departments.

Fox operates in regions of the State that lack skilled workers. The Company must hire and train unskilled workers and continue to develop incumbent employees. To do this, the Company has built new training areas in its manufacturing plants and machine shops so employees can learn new skills without being on the production floor. Fox is also establishing an Associate Training Plan and a Certification Program for Production Staff, with the aim of improving career opportunities and retention. Trainees will receive comprehensive skills to increase their knowledge.

Fox's “powered vehicle” production line has expanded rapidly, with new contracts (Ford, Chrysler, Toyota, and others). Fox anticipates continued growth in this area. The Company plans to implement ERP from El Cajon to all facilities. Additionally, the Company anticipates adding over $4 million worth of equipment within the next year across its three manufacturing facilities to keep up with demand (most will be installed in El Cajon). Fox requires additional assembly and CNC machines, lathes and etching machines, dynamometers, oil fill machines, and various safety and testing equipment.

Retrainee - Job Creation

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

Fox will be expanding business capacity, purchasing new equipment and expanding facilities. The Company has committed to hiring 25 new employees, 5 of whom will be veterans. The date-of-hire for trainees must be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.
Veterans Program

The Panel has established a higher reimbursement rate of $22 per hour and other incentives for training California veterans. Fox has been working with the Work For Warriors (http://www.workforwarriors.org/) program and with Lucas Group Military Veteran Staffing Agency in order to hire Veterans. Fox has eight Veterans who will be participating in ETP-funded training as Retrainees (Job Number 3), and Fox has set a goal of hiring and training five more Veterans over the next two years (Job Number 4).

Training Plan

All training will be delivered by in-house subject matter experts. Fox will offer the majority of its training via Classroom, Simulated Lab, or Productive Lab formats. The Company will also deliver some training using E-Learning since its facilities are dispersed throughout the State. Computer-Based Training will be offered in two courses.

Business Skills (10%): Training will be offered to Managers, IT Staff, Administrative Staff, and Production Staff on a multitude of process improvements enabled by the Company’s new ERP system. Employees will require training on process changes for everything from accounting to inventory control. Administrative Staff and Managers will also receive training on sales strategies and negotiations, facilitation/presentation skills, and a variety of customer service and strategic planning skills to help the Company to grow its business.

Computer Skills (10%): Training will be offered to all occupations as Fox rolls out its new ERP to the Watsonville and Scotts Valley facilities. Production Staff will require training on the new ERP system which touches nearly all aspects of the Company’s operations: production tracking and planning, shipping, billing, procurement, accounting, HR.

Continuous Improvement (15%): Training will be offered to all employees. Training will focus on standards and process improvements, along with leadership training for staff. ISO training, process improvement and Lean Manufacturing training will increase production and reduce waste. Leadership training will enable the Company to promote leaders from within as it grows and adds production lines and associated lead positions.

Hazardous Materials (5%): Training will be offered to Production Staff on material safety data sheets, proper handling of hazardous materials, and control of Hazmat waste/spill. Training will increase worker safety and prevent industrial accidents.

Manufacturing Skills (20%): Training will be offered to Production Staff on Manufacturing Skills such as assembly procedures, equipment operations, and maintenance procedures as the Company will be adding equipment, products, and production lines. The Company has created new “Mock Training Cells” at each production facility. (A designated trainer provides instruction on processes.) These Cells are mainly used for training new hires, however, they may also be used for incumbent workers (cross-training and new equipment).

Productive Laboratory – Manufacturing Skills (40%):

Productive Laboratory (PL) training is hands-on instruction or skill acquisition under the constant and direct guidance of a qualified trainer, offered in a productive work setting. PL is necessary in enabling trainees to fully apply and implement processes and techniques learned in a Class/Lab environment.

As a manufacturer, Fox delivers much of its training on the production floor as PL. During the previous Agreement, over 75 employees received more than 40 hours of PL training at the Company’s cost. Fox requests a maximum of 60 hours of PL in Manufacturing Skills to 200 newly hired and incumbent Engineers and Production Staff. Training will be delivered with a 1:1...
trainer-to-trainee ratio. Trainees will gain the ability to operate, maintain, and troubleshoot new equipment. PL training will be delivered at the Company’s operations facility in Watsonville, machine shop in Scotts Valley, and manufacturing plant in El Cajon.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Fox allocates $491,000 annually on training including basic computer skills, career advancement, sexual harassment prevention, and safety. The Company emphasizes worker safety, providing monthly safety training classes and developing safety committees at each facility. Safety training will continue to be provided in accordance with all pertinent requirements under state and federal law.

Fox recently invested significant capital in developing the “Mock Training Cells” that will be used for much of the training in this proposal. These training labs are located near the production floor, and can be configured to provide training on a variety of equipment, production roles and processes.

- Training Infrastructure

Fox is prepared to start training upon approval of this project. Fox has designated the HR Business Partner, who served in the same role on the previous contract, to oversee scheduling, delivery, and documentation of training. This person will coordinate with administrative staff at each facility to ensure that training is tracked on ETP approved rosters. Internal trainers will work with HR Business Partner to schedule and deliver training.

Temporary to Permanent Hiring

Fox intends to train 25 workers in Job Numbers 2 and 4 under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to the Company, the average time for “converting” temporary workers into full-time permanent employment is three months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled as trainees until after they have been hired by Fox 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.

High Unemployment Area

Trainees in Job Numbers 1 and 3 work in Scotts Valley and Watsonville (Santa Cruz County), High Unemployment Areas (HUA) with unemployment exceeding the state average by 25%. The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department. These trainees may qualify for a wage modification. However, Fox is not requesting a wage modification.

Substantial Contribution

Fox is a repeat contractor with potential earnings of $314,936 within the last five years. However, no single facility has earned in excess of $250,000. Therefore, a Substantial Contribution does not apply.
RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0341</td>
<td>Watsonville, Scott’s Valley, El Cajon</td>
<td>01/05/15-01/04/17</td>
<td>$314,936</td>
<td>$314,936*</td>
<td>100%</td>
</tr>
</tbody>
</table>

*This project has not yet finished with Fiscal Closeout. However, the Company has submitted training hours sufficient to earn 100% of the Approved amount.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

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**
- Customer Management Flow
- Business Initiatives
- Design Review Process
- Accounting Processes
- Coaching
- Facilitation/Presentation Skills
- Financial Analysis and Management
- Financial Strategies
- Inventory Control
- Invoicing/Financial Statements
- Payroll Systems
- Relationship Building Through Sales and Service
- Sales Strategies & Negotiations
- Service Request Resolutions
- Scheduling Materials
- Procurement Skills
- Product Management

**COMPUTER SKILLS**
- Customer Tax Information
- Computer Application Software
- Financial Accounting Systems
- CAD/CAM
- ERP and MRP Systems (Oracle)
- Master Data Management
- Human Resources Interface Systems
- ADP Applications

**CONTINUOUS IMPROVEMENT**
- Audit Jobs
- Calibration Maintenance and Skills
- Coaching & Giving/Receiving Feedback
- Communicating Effectively
- International Shipments
- UPS/FEX Codes
- Process Improvement
- Flow Rack Process
- Lean Manufacturing
- Kaizen Methodology
- Work Instructions
- Kanban Principals
- Organizing Workflow & Setting Goals
- Performance Development Plans
- Pull System
- Role of the Lead
- Supply Chain Management
- Train the Trainer Skills
- Workflow/Measurement
- ISO 9000/Certification
- Logistics
- Leadership
- Team Building

HAZARDOUS MATERIALS
- Proper Handling of Hazmat Materials
- Control of Hazmat Waste/Spill
- Material Safety Data Sheets

MANUFACTURING SKILLS
- Assembly Procedures
- Body Sanding
- Blueprint Reading
- Decal Training
- Equipment Operations
- Good Manufacturing Practices
- Ergonomics for Dynos
- Job Instruction/Analyzing Jobs for Efficiency
- Laser Engraver Set-Up
- Manufacturing Practices
- Maintenance Procedures
- Operations and Processes
- Production Operations
- Racking and Labeling Processes
- Warehousing Operations & Distribution
- Measurement and Calibration
- Operations Skills for New Machinery

**PL Hours**
0 – 60

**MANUFACTURING SKILLS** (1:1 trainer-to-trainee ratio)
- Body Capping
- New Machinery
- Good Manufacturing Practices
- 5S Standards
- Equipment Operations
- Operations and Processes
- New Product Build Processes
- Analyzing Jobs for Efficiency
- Pallet Assembly
- LCD Assembly
- Business Process Re-Engineering
- Re-Work
- Tumblers
- Forklift Certification
- Piston Prep
- Deburring Parts
- Material Handling
- Machining – Lathes/Mills
- QA Tooling
- QC Built Shock

CBT Hours
0 - 2

COMPUTER SKILLS (CBT)
- Excel – 1 Hour
- Cyber Security – 1 Hour

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL training is capped at 60 hours per trainee and CBT is capped at two hours per trainee.
RETRAINEE - JOB CREATION
Training Proposal for:
Betts Company
Agreement Number: ET17-0441

Panel Meeting of: February 23, 2017
ETP Regional Office: Sacramento
Analyst: D. Jordan

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s): Manufacturing</th>
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</thead>
<tbody>
<tr>
<td>Retrainees Priority Rate</td>
<td></td>
</tr>
<tr>
<td>HUA</td>
<td></td>
</tr>
<tr>
<td>Job Creation Initiative</td>
<td></td>
</tr>
<tr>
<td>Priority Industry: ☒ Yes ☐ No</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
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</thead>
<tbody>
<tr>
<td>Alameda, Fresno, Los Angeles</td>
</tr>
<tr>
<td>Sacramento, San Bernardino, San Joaquin</td>
</tr>
<tr>
<td>Repeat Contractor: ☒ Yes ☐ No</td>
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</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Yes ☒ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA: 231</td>
</tr>
<tr>
<td>U.S.: 256</td>
</tr>
<tr>
<td>Worldwide: 256</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>7%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors: (% of total trainees)</th>
</tr>
</thead>
<tbody>
<tr>
<td>11%</td>
</tr>
</tbody>
</table>

FUNDING DETAIL

\[
\text{Total ETP Funding} \, = \, \text{Program Costs} \, - \, \text{(Substantial Contribution)} \, - \, \text{(High Earner Reduction)}
\]

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Costs</td>
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<td></td>
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<td>(High Earner Reduction)</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>$301,200</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
</tr>
</thead>
<tbody>
<tr>
<td>100% of Total ETP Funding Required</td>
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</tbody>
</table>

$275,000
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Retraineep</td>
<td>Business Skills, Computer Skills, Continuous Improvement Skills, Literacy Skills, Mfg. Skills, PL-Mfg. Skills</td>
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<td>8 - 200</td>
<td>$1,260</td>
<td>$16.16</td>
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<tr>
<td>3</td>
<td>Retraineep</td>
<td>Business Skills, Computer Skills, Continuous Improvement Skills, Literacy Skills, Mfg. Skills, PL-Mfg. Skills</td>
<td>15</td>
<td>8 - 200</td>
<td>$1,600</td>
<td>$10.80</td>
</tr>
</tbody>
</table>

*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 (Retraineep/Priority/HUA): Fresno and San Joaquin $12.12 per hours; Job Number 2 (Retraineep/Priority): Alameda $17.63, Los Angeles $16.96, Sacramento $16.46 and San Bernardino $16.16; Job Number 3 (Job Creation/Priority/HUA): Fresno $10.50 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 $2.10 per hour may be used to meet the Post-Retention Wage in Job Numbers 1 & 2.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td></td>
<td>28</td>
</tr>
<tr>
<td>Drivers</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Engineer</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Maintenance</td>
<td></td>
<td>5</td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1868, and headquartered in Fresno, Betts Company, (Betts) www.betts1868.com, is a family owned business that manufactures and sells steel springs for the automotive and truck industries. In the nineteenth century, Betts began manufacturing steel springs for carriages, streetcars, and wagons of every kind. As the automotive industry developed, Betts was at the forefront of development and manufacturing of springs for these innovative new methods of transportation.

Today Betts is still owned by the Betts family and currently offers a portfolio that includes Heavy Duty Vehicle Components, Coil and Leaf Springs, Custom Steel Parts, and Truck Parts and Service. Betts supplies to international customers including the automotive industry, Original Equipment Industry Parts Distributors, Vehicle Service Companies and the Trucking Industry. Their customers include Volvo, Mack and Kenworth. Training will take place at Betts locations in Fresno, San Joaquin, Sacramento, San Bernardino, Alameda and Los Angeles Counties.

Need For Training

This is Betts’ third ETP proposal, the third in the last 5 years. Approximately 37% of Betts products are sold to customers outside of California. As such, Betts faces strong out of state competition. The main goal for Betts is to remain competitive. To do so, Betts is making a substantial investment in Equipment and Software. This investment will facilitate the need for efficiency, increased capacity, and faster reaction time to customer needs. Betts LEAN transformation will continue with a more complete and advanced module of training. Betts will be executing a companywide rollout of their ERP system. The new ERP system will increase efficiencies, allow for more reduced inventory, and increase the ability to monitor product inventory. This ERP system was purchased during the previous ETP Agreement but was not implemented at that time.

Betts plans to enhance the quality of workplace communication by delivering ESL training to a number of their front line employees with limited English skills. The ESL program was included
in the previous ETP Agreement but was not implemented at that time due to lack of qualified instructors. However, Betts now has qualified instructors scheduled to provide ESL training. Betts management team will receive training on leadership and ADP software.

**Retrainees - 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. Betts is making a substantial investment in Equipment and Software.

Betts has committed to hiring 15 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.

Betts projects company growth during the duration of this proposal. Betts is increasing their market share. Occupations to be hired are a part of their strategic plan. This will support their investments in LEAN training and the rollout of their ERP software.

**PROJECT DETAILS**

**Training Plan**

Training will be provided by in-house subject matter experts.

**Business Skills** (20%): Training will be delivered to Administrative, Sales and Frontline Management Staff. Training will focus on advanced sales, customer service, strategic planning and social media marketing. Training will provide staff with the tools to meet customers’ needs and manage the growth Betts projects.

**Computer Skills** (35%): Training will be delivered to all trainees. The focus of training will be on the implementation of the ERP system to provide advanced abilities to gather data and facilitate better decision making and planning. Training will also include ADP and AutoCAD.

**Continuous Improvement** (20%): Training will be delivered to all trainees. Betts training will focus on leadership and coaching skills for new trainees to help them attain the skills that incumbent staff has. Training will also focus on advanced quality control.

**Literacy Skills** (5%): Training will be delivered to Production, Warehouse, Drivers and Mechanic Staff. To enhance communications Betts will provide ESL training to Spanish speaking trainees.

**Manufacturing Skills** (15%): Training will be delivered to all trainees. Training will focus on Advanced LEAN Manufacturing and the new equipment. Training topics include Visual Factory, Production Equipment Operation and Maintenance training.

**Productive Laboratory – Manufacturing Skills** (5%):

PL training will be offered to 50 Production and Maintenance Staff. Betts has invested over $1.1 million in new equipment to increase capacities and output. Trainees will be trained on new equipment to ensure they can flex across workstations. Supervisory and frontline Managers who have been trained by the equipment manufacturer and certified proficient will conduct training.

Betts is requesting a 1:2 trainer-to-trainee ratio for PL training. The higher ratio is necessary, as PL training will be conducted in small groups, as they normally provide such training, to increase
efficiency, enabling trainers to affectively address issues as they arise while training Production Staff on new equipment. Maintenance Staff will go through the same training, but more advanced. Maintenance Staff will also go through preventative maintenance and repair. PL is capped at 10 hours per trainee.

Commitment to Training

Betts currently has an annual training budget of $150,000, which includes company specific orientation, sexual harassment prevention training, and new employee 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

A Manager will be responsible for oversight of the ETP program at each location. These Managers will collect and send rosters to the Director of Human Resources at the corporate office. Strategic Business Solutions will also provide assistance with the administration of the Agreement.

High Unemployment Area

All trainees in Job Number 1 & 3 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 and San Joaquin counties are a 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. Betts is requesting a wage modification from $16.16 to $12.12 per hour for 38 trainees (Job Number 1). Betts is also requesting a wage modification from $13.22 to $10.80 for 13 trainees (Job Number 3).

Temporary to Permanent Hiring

A portion of the trainees in Job Number 3 (8 trainees) come under guidelines for “temporary to permanent” employment. Betts has retained these employees through a temporary agency, with the intention of hiring them into full-time, permanent positions after training. According to Betts, the average time for “converting” temporary workers into full-time permanent employment is 4 months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by Betts. Until then, Betts will not receive progress payments.

Impact/Outcome

Betts goals are to increase trainee’s proficiency on new equipment and LEAN training to provide a heightened awareness for identifying and reducing waste. Also, Betts projects their quality control training in conjunction with Lean training will provide quality that exceeds customer expectations. Betts will also increase the ability to monitor and control inventory with implementation of their ERP software.
RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0354</td>
<td>Multiple</td>
<td>12/01/14-11/30/16</td>
<td>$98,388</td>
<td>$98,388</td>
<td>(100%)</td>
</tr>
<tr>
<td>ET12-0403</td>
<td>Multiple</td>
<td>05/28/12-05/27/14</td>
<td>$169,560</td>
<td>$107,968</td>
<td>(64%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

Betts Company retained Strategic Business Solutions, LLC in Visalia to assist with development of this proposal for a flat fee of $7,750

ADMINISTRATIVE SERVICES

Strategic Business Solutions, LLC will also perform administrative services in connection with this proposal for a fee of 10% of payment earned.

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Advanced Sales Training
- Advanced Customer Service Training
- Performance Evaluation Management
- Strategic Planning and Growth Change Management
- Social Media and Automated Marketing Training

**COMPUTER SKILLS**
- ERP (Inform/ISCI) System Training
- Advanced Microsoft Applications
- ADP Systems Training
- Auto CAD/CAD 3D (Computer Assisted Drawing) Training

**CONTINUOUS SKILLS**
- Advanced Quality Control Training
- Leadership/Teambuilding and Coaching Skills

**LITERACY SKILLS**
- ESL – English as 2nd Language
- Math terms for Production Workers
- Writing Skills for Reports and other work related documents
- Effective Communication Skills with Customers and Co-Workers

**MANUFACTURING SKILLS**
- Advanced LEAN Training Phase III
- Production Equipment Operation and Maintenance Training
- Visual Factory

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

**PL Hours**

0-10

**MANUFACTURING SKILLS (PL) (limited ratio 1:2)**
- Production Equipment Operation and Maintenance

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 10 hours per-trainee.
Training Proposal for:

Clark Pest Control of Stockton, Inc. dba Clark Pest Control

Agreement Number: ET17-0410

Panel Meeting of: February 23, 2017

ETP Regional Office: Sacramento  Analyst: K. Smiley

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraining SET HUA</th>
<th>Industry Sector(s):</th>
<th>Services Pest Management</th>
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</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Merced, San Joaquin, Shasta, Stanislaus, Sutter</td>
<td>Repeat Contractor:</td>
<td>Yes No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>Yes No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Number of Employees in: CA: 970  U.S.: 990  Worldwide: 990

Turnover Rate: 8%

Managers/Supervisors: (% of total trainees) N/A

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$261,000</td>
<td>$0</td>
<td>$0</td>
<td>$261,000</td>
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In-Kind Contribution: 100% of Total ETP Funding Required $300,000
TRAINING PLAN TABLE

<table>
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<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SET HUA</td>
<td>Business Skills, Commercial Skills, Computer Skills, PL-Commercial Skills</td>
<td>290</td>
<td>8-200</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

*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: $12.12 per hour for San Joaquin, Stanislaus, Merced, Sutter and Shasta counties.

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

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

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

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Staff</td>
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<td></td>
</tr>
<tr>
<td>Field Staff</td>
<td>180</td>
<td></td>
</tr>
<tr>
<td>Frontline Manager</td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1950 and headquartered in Lodi, Clark Pest Control of Stockton, Inc. dba Clark Pest Control, CPC provides pest management solutions to residential and business clients. CPC has locations throughout California, however, only the facilities located in the San Joaquin, Stanislaus, Merced, Sutter and Shasta counties will participate in training.

PROJECT DETAILS

CPC will train staff on invasive insects, new equipment and business processes to ensure trainees have the skills to be subject matter experts and provide exception customer service. CPC’s training plan will focus on providing its workforce infestation detection and eradication techniques as well as business process and procedures. Training will ensure trainees have sufficient knowledge to effectively detect and exterminate pests. Training Administrative Staff on Customer Service and Internal Controls will increase client satisfaction and ensure consistency in business practices.
Over the last 3 years, invasive insects have been disproportionately contributing to sudden Oak death. Invasive insects are directly contributing to the mortality of tree species along the Mount Shasta areas, Sierra Nevada and South Coast range. CPC must train workers to properly detect and eradicate invasive insects to meet their client’s needs. Topics such as Entomology and Pest Management Assessment and Inspection will give staff the skills needed to manage these pests.

In the last 5 years, incidence of bedbugs has been on the rise in CA. Bedbugs are traditionally difficult to eradicate and can travel up to 2,500 miles without a food source. Due to the prevalence of Bedbugs, CPC has purchased $75,000 in Heat Treatment Equipment, the industry standard in bedbug eradication. In order to provide cutting-edge services, CPC is using Heat Treatment Equipment in all cases of bedbug occurrence. Training on this equipment will ensure trainees can properly identify and exterminate Bedbugs.

Training Plan

Training will be delivered via Class/Lab and Productive Lab (PL) training by internal trainers and vendors.

Business Skills (25%): Training will be offered to all occupations to improve client satisfaction and business efficiency. Courses include Customer Service, Internal Controls, Budget Reports and Competitive Analysis.

Commercial Skills (65%): Training will be offered to Field Staff and Frontline Managers to increase service and chemical application knowledge. Topics include Pest Management Overview, Entomology, Toxicology, Field Analytics and Pest Management Assessment & Inspection.

Computer Skills (5%): Training will be offered to all occupations. Training on Excel software will ensure competency in tracking of services and invoices. Training on Tableau will ensure accurate data management.

Productive Laboratory (5%)

CPC will train 180 Field Staff on Sprayers, Fogging Equipment, Granular Spreaders and Lifts. During PL training, chemical application will be slowed as staff learn to accurately apply chemicals. A subject matter expert will conduct training. The trainer will demonstrate use of the equipment and then supervise trainees using the equipment. The trainer will also identify locations of infestation and then require the trainee to find locations of infestation. PL training will supplement classroom training to ensure trainees understand proper detection and application of chemicals. PL training is necessary as it is not possible to replicate field environments in the classroom. The trainer will attest to the trainee’s competency once training is completed.

Training will be provided at a 1:1 trainer-to-trainee ratio and is capped at 24 hours per trainee.

Frontline Managers

Frontline Managers directly supervise frontline workers and actively participate in chemical application. CPC’s Frontline Managers do not dictate policy and receive an hourly wage. Based on the nature and scope of their job duties, these trainees meet the Panel’s definition of frontline worker. As frontline workers, these trainees qualify for Special Employment Training (SET) funding and are not included in the percentage of managers and supervisors identified on Page 1 of this proposal.
SET/High Unemployment Area

Under Special Employment Training (SET) companies are not required to demonstrate out-of-state competition and trainees must be earning at least the statewide average hourly wage at the end of the retention.

However, Job Number 1 trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 15%. The Company’s locations in San Joaquin, Stanislaus, Merced, Sutter and Shasta counties qualify for HUA status. These trainees qualify for the ETP Reduced Standard Wage rather than the statewide average hourly wage. CPC is requesting a wage modification from $29.38 to $12.39.

Commitment to Training

CPC has an annual training budget of $834,315. Training includes new-hire orientation, staff development 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

Most training will be provided by in-house subject matter experts, consisting of senior-level Field Staff and dedicated technical trainers. CPC may also use a training vendor. A Training Coordinator will be assigned to each participating facility to track, schedule and administer ETP-funded training. Each Training Coordinator will report to the Director of Training at the HQ facility in Lodi.

Scheduling and tracking the ETP training will be completed through CPC’s LMS system, which will ensure consistency and accuracy throughout all facilities. CPC has a dedicated Training Department that has been functional for over 10 years, devoted to employee development. CPC has a comprehensive training plan and dedicated staff to effectively administer the ETP Training Agreement.

Learning Management System

Staff has reviewed and approved the Company’s use of a Learning Management System for recordkeeping.

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**
- Internal Controls
- Budget Reports
- Customer Service
- Contact Center Sales
- Customer Engagement Strategies
- Competitive Analysis

**COMPUTER SKILLS** (Intermediate and Advanced Only)
- Excel
- Tableau
- ADP Payroll Software
- Windows Firewall Notifier Software

**COMMERCIAL SKILLS**
- Pest Management Overview
- Entomology
- Toxicology
- Pest Management Assessment & Inspection
- Morphology and Ecology Principles
- Field Analytics

Productive Lab Hours

0-24

**COMMERCIAL SKILLS** (Ratio 1:1)
- Pest Monitoring
- Pesticide Application
- Pest Identification
- Service Protocol

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 24 hours per-trainee.
# Training Proposal for:

**Macias, Gini, and O'Connell, LLP**

**Agreement Number:** ET17-0407

**Panel Meeting of:** February 23, 2017

**ETP Regional Office:** Sacramento  
**Analyst:** J. Lazarewicz

## PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Industry Sector(s):</strong></td>
<td>Financial</td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>☐ Yes  ☒ No</td>
</tr>
<tr>
<td><strong>Counties Served:</strong></td>
<td>Contra Costa, Los Angeles, Orange, Sacramento, San Diego</td>
</tr>
<tr>
<td><strong>Repeat Contractor:</strong></td>
<td>☐ Yes  ☒ No</td>
</tr>
<tr>
<td><strong>Union(s):</strong></td>
<td>☐ Yes  ☒ No</td>
</tr>
<tr>
<td><strong>Number of Employees in:</strong></td>
<td>CA: 304  U.S.: 304  Worldwide: 304</td>
</tr>
<tr>
<td><strong>Turnover Rate:</strong></td>
<td>4%</td>
</tr>
<tr>
<td><strong>Managers/Supervisors:</strong> (% of total trainees)</td>
<td>0%</td>
</tr>
</tbody>
</table>

## FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>= Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$305,640</td>
<td>$0</td>
<td>$0</td>
<td>$305,640</td>
</tr>
</tbody>
</table>

| In-Kind Contribution: | 100% of Total ETP Funding Required | $1,301,340 |
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine</td>
<td>Business Skills, Commercial Skills, Computer Skills</td>
<td>283</td>
<td>8-200</td>
<td>0</td>
<td>$1,080</td>
</tr>
</tbody>
</table>

Minimum Wage by County: $17.63 per hour in Contra Costa County; $16.96 per hour in Los Angeles County; $17.22 per hour in Orange County; $16.46 per hour in Sacramento County; $16.72 per hour in San Diego County

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

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

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

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Staff</td>
<td></td>
<td>62</td>
</tr>
<tr>
<td>Associate Staff</td>
<td></td>
<td>128</td>
</tr>
<tr>
<td>Engagement Management</td>
<td></td>
<td>71</td>
</tr>
<tr>
<td>Engagement Management 1</td>
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<td>22</td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1987 and headquartered in Sacramento, Macias, Gini, and O’Connell, LLP (MGO) (www.mgocpa.com) is a full service accounting and professional services firm that specializes in tax, assurance, advisory, outsourcing, staffing and business management services. MGO has ten locations throughout California. Eight locations in Century City, Los Angeles, Newport Beach, Sacramento, San Diego (2), Walnut Creek and Woodland Hills will participate in training. MGO primarily serves enterprises in healthcare, technology, media and entertainment, higher education, government entities, non-profit organizations, and tribal nations. This will be MGO’s first ETP Agreement.

MGO is eligible for standard retraining under the Out-of-State Competition Provisions as a company primarily engaged in providing services in California that regularly compete with service providers located out-of-state.

PROJECT DETAILS

The need for training is driven by MGO’s continuous effort to expand its business and remain competitive in an industry that is consolidating. With larger accounting firms purchasing smaller firms, MGO has remained prominent in the industry by expanding into areas that are not traditional
practice areas for accounting firms. This includes not only accounting services, but advisory services, outsourcing studies, staffing resources and business management services. To continue this trend, and keep up with rapid changes brought about by industry and government requirements, the Company must provide employees with the knowledge essential to delivering sound financial advice and tax planning strategies. For example, recent changes by the United States Department of the Treasury regarding 401(k) contributions, tax brackets and rates, tax credits, and tax deductions have created a need for training among Associate and Engagement Management Staff.

MGO has developed a company-wide training program to increase employee knowledge of regulatory changes, enhance technical skills and improve performance. Employees must be trained on the most recent financial information and software applications available to keep pace with industry and client requirements. MGO must also upgrade staff skills in communication, leadership, sales and teambuilding to improve business processes and serve its clients.

MGO is committed to providing employees with the very best continuing professional education and knowledge updates available. ETP-funded training will help the Company achieve this as well as remain competitive.

Training Plan

MGO will provide Class/Lab training delivered by in-house subject matter experts and vendors to be determined. The proposed training plan consists of the following:

**Business Skills** (10%): Training will be provided to all occupations. Topics in Customer Relationship, Communication and Presentation will ensure employees develop the skills to provide quality customer service, improve customer relationships, and deliver informed presentations and recommendations. Engagement Management will benefit from Leadership Skills training to improve management skills and create a better work environment.

**Commercial Skills** (80%): Training will be provided to all occupations. Specialized training topics in Accounting and Auditing, Tax Regulations, Tax Compliance and Regulatory Review will enable workers to stay current and keep clients in compliance with regulatory changes.

**Computer Skills** (10%): Training will be provided to all occupations. Training in Quickbooks, Intermediate and Advanced Microsoft Office, and CCH tax software will enable employees to create databases, spreadsheets, reports, charts, graphs and professional presentation materials to improve productivity.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. MGO’s current training budget is approximately $1,089,376 annually for eight of its California offices. Recent training includes sexual harassment prevention, safety training, and updates on new tax laws and regulatory changes. In addition, various job-specific skills training is provided as necessary to ensure minimum competency in a given position.

- **Training Infrastructure**

  The Director of Staff Development will oversee all administration including enrolling trainees, scheduling training, tracking training hours, and other duties as needed. Each participating location will have a designated person to collect rosters. MGO will also receive assistance from an administrative subcontractor, Training Refund Group. The Company is scheduled to begin training upon Panel approval. The proposed training will successfully deliver hours, which are consistent with the average training hours the Company has delivered over last 12 months.
Impact/Outcome

ETP-funded training will enable increase employees’ current knowledge, technical expertise resulting in improved service to clients.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Training Refund Group in Anaheim assisted with development for a flat fee of $3,000.

ADMINISTRATIVE SERVICES

Training Refund 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
8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Leadership
- Communications
- Team Building
- Presentation Skills
- Conflict Resolution
- Networking
- Sales Skills
- Customer Relationship
- Project Management

**COMMERCIAL SKILLS**
- Best Practices
- Accounting and Auditing
- Detection and Reporting of Fraud
- Governmental Auditing/Environment
- Governmental
- Regulatory Review
- Tax Regulations
- Tax Compliance
- Estate Planning
- Employee Business Plans
- Securities Exchange Commission Rules
- Financial Institution Auditing Principles

**COMPUTER SKILLS**
- Intermediate Microsoft Office
- Advanced Microsoft Office
- Checkpoint Tax Research
- CCH ProSystem fx Tax Software
- Audit Management Software
- Quickbooks

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
Brand Consulting Group, LLC dba Brand College

Agreement Number: ET17-0426

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood

 Analyst: M. Paccerelli

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraineep</th>
<th>Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Technology/IT</th>
<th>Technology/Other Manufacturing Services</th>
<th>Retail</th>
<th>Priority Industry:</th>
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<tbody>
<tr>
<td></td>
<td>SB &lt;100</td>
<td>SET</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>HUA</td>
<td></td>
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<td></td>
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</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Statewide</th>
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<table>
<thead>
<tr>
<th>Repeat Contractor:</th>
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<table>
<thead>
<tr>
<th>Union(s):</th>
<th>☑ Yes ☐ No</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>≤20%</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors: (% of total trainees)</th>
<th>≤20%</th>
</tr>
</thead>
</table>

### FUNDING DETAIL

- **Program Costs**: $887,520
- **Support Costs**: $61,474 (8%)
- **Total ETP Funding**: $948,994

| In-Kind Contribution: | 50% of Total ETP Funding Required | $1,023,680 |
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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<tbody>
<tr>
<td>1</td>
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<td>Advanced Technology</td>
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<td>8-200</td>
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<td>$2,224</td>
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<td>8-200</td>
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<td>$1,882</td>
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<td>SET</td>
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<td></td>
<td>Weighted Avg: 80</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Hourly Wage by County:** Job Numbers 1-5: $16.96 per hour for Los Angeles County; $17.22 per hour for Orange County; $16.72 per hour for San Diego County; and $16.16 per hour for Kern, Ventura, San Bernardino and Riverside Counties. SET: $22.04 in Job Number 6 and $29.38 in Job Number 7 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 Participating employers may use health benefits to meet the Post-Retention Wage.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desktop Support</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>System Engineer</td>
<td>39</td>
<td></td>
</tr>
<tr>
<td>Network Administrator/Engineer</td>
<td>85</td>
<td></td>
</tr>
<tr>
<td>Network Operations Center (NOC) Technician/Engineer/Operator</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Data Engineer</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>System Administrator/Analyst</td>
<td>29</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Found in 2004, Brand Consulting Group, LLC dba Brand College (Brand College) (www.brandcollege.edu) is a training agency that provides Information Technology (IT) courses designed to help IT professionals and businesses succeed in today's technology-driven environment.

Brand College is dedicated to facilitating the career development of highly qualified professionals trained to design, implement, and maintain information systems. Participating employers qualify as high-tech companies, software publishing, broadcasting, internet publishing, web hosting/search portals, telecommunications, and other companies facing out-of-state competition. This proposal will also utilize Special Employment Training (SET) funds for frontline workers who earn at least the Statewide Average Hourly Wage in businesses that do not face out-of-state competition.

PROJECT DETAILS

Training Plan

This will be the Brand College’s sixth ETP Agreement, the fifth in the last five years. As the IT industry enters into a new era of automation, business needs are being re-evaluated to take advantage of new complex and sophisticated technologies that require support personnel with advanced training and skills. Employers are seeking training in IT solutions that will streamline processes, secure valued system data, and minimize down time. The proposed training focuses on network architecture and related systems infrastructure to ensure trainees are current on the most advanced network solutions applications in the IT industry.

Curriculum Development

Brand College provides training aligned with the requirements and expectations of the technology industry and California employers. Curriculum development entails participation by the school staff, educators, hiring managers and graduating students. Feedback is solicited during exit interviews of previous participating employers and trainees for continuous improvements to training programs.

The proposed curriculum was developed and reviewed by Brand College’s Program Advisory Committee (PAC) which consists of IT professionals and employers. Utilizing their current industry knowledge and expertise, the committee evaluated each training program and recommended modifications and enhancements. Based on the PAC’s recommendation, Brand has made several adjustments in the program which resulted in overall improvements in student’s academic success as well as their ability to secure and retain employment.
**Advanced Technology (100%)**

Training will be offered to all occupations to improve technical expertise of IT professionals. Due to the complex nature of course materials, the proposed training will be provided in classes with ten or fewer trainees to allow in-depth coverage and personal attention from the instructor.

Training will be conducted at Brand College’s facilities in Glendale. The school is fully equipped with Cisco routers and switches and trainees will be exposed to a live, non-simulated environment. The equipment and labs required to run these courses are complex and expensive. Brand College requests the ETP Advanced Technology reimbursement of $26 per hour for priority industries and $22 for non-priority industries based on the high cost of instructor time; use of expensive, high-tech equipment and software; and cost of technical books and manuals.

**Marketing and Support Costs**

Through its many years of experience in providing IT training to private sector, Brand College has accumulated a database of over 300 companies across various industries. Brand College also receives a large number of business referrals from key partners such as Microsoft and Cisco. In addition, Brand College relies on valuable contact data gathered from potential clients who frequently visit the school website receiving an average of 32 leads a week online.

Brand College continuously markets their training programs in a variety of ways including personal contact, telephone calls and direct mail to recruit companies. Brand College is requesting 8% support costs to cover the cost of recruiting additional employers and assessing employer-specific job training requirements. Employer recruitment, including the recruitment of small businesses and assessment activities, will continue throughout the contract term.

**Impact/Outcome**

Trainees may earn the following certifications: Microsoft Certified System Engineer, Linux Certified Administrator, Cisco Certified Network Administrator, Cisco Certified Network Professional, Cisco Certified Security Professional, Certified Desktop & Network Specialist, Certified Multi-Platform Network Specialist, Certified LAN & WAN Specialist, Cisco Certified Network Expert, and Certified Network Technologies Expert.

**Commitment to Training**

ETP funds will not displace the existing financial commitment to training of participating employers. These employers have a strong commitment to training their employees but lack the necessary resources to fully train them. Some companies are small and do not have a significant training budget; other larger, more established companies have stretched their training budgets to the limits and cannot provide the level of training they would like their employees to receive. ETP funds will augment participating employer budgets, which are used primarily for basic job skills, and help these companies provide needed training to targeted staff. Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law.

**Special Employment Training**

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition (Job Numbers 5-7). To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.
Priority Industry Wage Modification

However, trainees employed in a priority industry qualify for a SET wage modification up to 25% below the statewide average hourly wage from $29.38 to $22.04. Brand College requests this modification for Healthcare industries (Job Number 6).

HUA Wage Modification

Trainees in Job Numbers 4 and 5 work in Los Angeles, Orange, Kern, Riverside, Ventura, and San Bernardino Counties, High Unemployment Areas (HUA) with unemployment exceeding the state average by at least 25%. These trainees qualify for the Standard ETP Minimum Wage rather than the SET Statewide Average Hourly Wage. Brand College is requesting this wage modification from $29.38 per hour to $22.04 per hour only for trainees in Job Number 5.

Training Agency Certification

Brand College is eligible as a training agency based on the following:

- BPPE licensure valid until March 31, 2018;
- Accreditation granted by Accrediting Commission of Career Schools and Colleges (ACCSC);
- Successful past performance with ETP (see Prior Project table).

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 Brand College under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
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<td>ET16-0215</td>
<td>$888,250</td>
<td>11/16/2015–11/15/2017</td>
<td>418</td>
<td>223</td>
<td>124</td>
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</table>

Based on the ETP Systems, 22,742 reimbursable hours that have been tracked for potential earnings of $617,675 (70% of approved amount). The Contractor projects final earnings of 100% based on training in progress and currently committed through March 2017.
PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
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<tbody>
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<td>ET14-0312</td>
<td>Glendale</td>
<td>03/01/2014-02/28/2016</td>
<td>$802,047</td>
<td>$723,378</td>
<td>(90%)</td>
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<td>ET13-0108</td>
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<td>09/01/2012-08/31/2014</td>
<td>$597,582</td>
<td>$568,920</td>
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</tr>
<tr>
<td>ET11-0274</td>
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<td>06/01/2011-05/31/2013</td>
<td>$359,877</td>
<td>$359,877</td>
<td>(100%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A
**Exhibit B: Menu Curriculum**

**Class/Lab Hours**
8-200

Trainees may receive any of the following:

**ADVANCED TECHNOLOGY**
- CompTIA A+ (PC Hardware Technician)
- Microsoft Certified System Engineer (MCSE)
- Linux+ (Linux Certified Professional)
- Cisco Certified Network Administrator (CCNA)
- Cisco Certified Network Professional (CCNP)
- Cisco Certified Security Professional (CCSP)
- Certified Desktop & Network Specialist (CDNS)
- Certified Multi-Platform Network Specialist (CMNS)
- Certified LAN & WAN Specialist (CLWS)
- Cisco Certified Network Expert (CCNE)
- Certified Network Technologies Expert (CNTE)
- VMware Certified Professional on vSphere 5 (VCP5)

---

**Note:** Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s)</th>
<th>Estimated # of employees to be retrained under this Agreement</th>
<th>Total # of full-time company employees worldwide</th>
<th>Total # of full-time company employees in California</th>
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<tbody>
<tr>
<td>AAA Network Services</td>
<td>8401 Page Street</td>
<td>Buena Park, CA 90621</td>
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<td>120</td>
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<td>AEG</td>
<td>865 S. Figueroa Street, Suite 2300</td>
<td>Los Angeles, CA 90017</td>
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<td>3000</td>
<td>1500</td>
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<td>Aire Spring</td>
<td>6060 Sepulveda Blvd., Suite 220</td>
<td>Van Nuys, CA 91411</td>
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<td>Total # of full-time company employees in California:</td>
</tr>
<tr>
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<td>Brown George Ross</td>
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<td>CBS</td>
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<td>Costa de Oro Media, LLC</td>
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<td>750</td>
<td>425</td>
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ETP 100B (1/09)
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<thead>
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<td>Aliso Viejo, CA 92656</td>
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<td>10600</td>
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<td>Dolby Laboratories Group</td>
<td>100 Potrero Ave.</td>
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<td>1,700</td>
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<td>East West Bank</td>
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<td>12</td>
<td>2,864</td>
<td>350</td>
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## Participating Employers in Retrainee
### Multiple Employer Contracts

**Contractor’s Name:** Brand Consulting Group dba Brand College  
**CCG No.:** ET17-0426  
**Reference No:** 17-0225  
**Page:** 4 of 11

<table>
<thead>
<tr>
<th>Company</th>
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<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s):</th>
<th>Estimated # of employees to be retrained under this Agreement:</th>
<th>Total # of full-time company employees worldwide:</th>
<th>Total # of full-time company employees in California:</th>
</tr>
</thead>
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<td>Engineering Employees Services</td>
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<td>Health Source MSO Inc.</td>
<td>100 N. Stoneman Avenue</td>
<td>Alhambra, CA 91801</td>
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<td>45</td>
<td>45</td>
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<td>3155-B E. Sedona CT.</td>
<td>Ontario, CA 91764</td>
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<td>25</td>
<td>25</td>
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<tr>
<td>J2Global</td>
<td>6922 Hollywood Blvd., Suite 500</td>
<td>Hollywood, CA 90028</td>
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<td>9</td>
<td>359</td>
<td>359</td>
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</tbody>
</table>

ETP 100B (1/09)
# Participating Employers in Retrainee

## Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s)</th>
<th>Estimated # of employees to be retrained under this Agreement:</th>
<th>Total # of full-time company employees worldwide:</th>
<th>Total # of full-time company employees in California:</th>
</tr>
</thead>
<tbody>
<tr>
<td>K &amp; B Surgical Center</td>
<td>9033 Wilshire Blvd., Suite 210</td>
<td>Beverly Hills, CA 90211</td>
<td>N/A</td>
<td>12</td>
<td>1,502</td>
<td>1,502</td>
</tr>
<tr>
<td>LA Network</td>
<td>15301 Ventura Blvd.</td>
<td>Sherman Oaks, CA 91403</td>
<td>N/A</td>
<td>11</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Lanair</td>
<td>620 N. Brand Blvd., Sixth Floor</td>
<td>Glendale, CA 91203</td>
<td>N/A</td>
<td>8</td>
<td>39</td>
<td>28</td>
</tr>
<tr>
<td>Latham &amp; Watkins</td>
<td>555 West 5th Street, Suite 800</td>
<td>Los Angeles, CA 90013</td>
<td>N/A</td>
<td>7</td>
<td>6,000</td>
<td>2,000</td>
</tr>
</tbody>
</table>

ETP 100B (1/09)
## Participating Employers in Retrainee Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor’s Name: Brand Consulting Group dba Brand College</th>
<th>CCG No.: ET17-0426</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No: 17-0225</td>
<td>Page 6 of 11</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company</th>
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<th>Total # of full-time company employees worldwide:</th>
<th>Total # of full-time company employees in California:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company: Life Care</td>
<td>21600 Oxnard Street, Suite 1500</td>
<td>Woodland Hills, CA 91367</td>
<td>N/A</td>
<td>11</td>
<td>209</td>
<td>209</td>
</tr>
<tr>
<td>Company: Media Temple, Inc.</td>
<td>8420 National Blvd.</td>
<td>Culver City, CA 90232</td>
<td>N/A</td>
<td>9</td>
<td>226</td>
<td>226</td>
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<tr>
<td>Company: Meruelo Media Holdings</td>
<td>9550 Firestone Blvd., Suite 105</td>
<td>Downey, CA 90241</td>
<td>N/A</td>
<td>5</td>
<td>82</td>
<td>82</td>
</tr>
<tr>
<td>Company: Minolta</td>
<td>11190 Valley View Street</td>
<td>Cyprus, CA 90630</td>
<td>N/A</td>
<td>5</td>
<td>41</td>
<td>41</td>
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</tbody>
</table>

ETP 100B (1/09)
## Participating Employers in Retrainee Multiple Employer Contracts

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<table>
<thead>
<tr>
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<th>Total # of full-time company employees worldwide</th>
<th>Total # of full-time company employees in California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mosaic NetworX, LLC</td>
<td>700 Larkspur Landing, Suite 214</td>
<td>Larkspur, CA 94939</td>
<td>N/A</td>
<td>6</td>
<td>20</td>
<td>20</td>
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<tr>
<td>Nexus IS</td>
<td>27202 Turnberry Lane, Suite 100</td>
<td>Valencia, CA 91355</td>
<td>N/A</td>
<td>12</td>
<td>752</td>
<td>541</td>
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<tr>
<td>Partners In Care Foundation</td>
<td>732 Mott Street, Suite 150</td>
<td>San Fernando, CA 91340</td>
<td>N/A</td>
<td>7</td>
<td>126</td>
<td>126</td>
</tr>
<tr>
<td>Patron Solutions</td>
<td>5171 California Ave.</td>
<td>Irvine, CA 92617</td>
<td>N/A</td>
<td>8</td>
<td>200</td>
<td>160</td>
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</table>

ETP 100B (1/09)
<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s)</th>
<th>Estimated # of employees to be retrained</th>
<th>Total # of full-time company employees worldwide</th>
<th>Total # of full-time company employees in California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred Long Distance</td>
<td>16830 Ventura Blvd., Suite 350</td>
<td>Encino, CA 91436</td>
<td>N/A</td>
<td>5</td>
<td>34</td>
<td>34</td>
</tr>
<tr>
<td>Riot Games</td>
<td>2450 Broadway</td>
<td>Santa Monica, CA 90404</td>
<td>N/A</td>
<td>20</td>
<td>2,200</td>
<td>1,400</td>
</tr>
<tr>
<td>Smart &amp; Final</td>
<td>600 Citadel Drive</td>
<td>Commerce, CA 90040</td>
<td>N/A</td>
<td>7</td>
<td>700</td>
<td>700</td>
</tr>
<tr>
<td>Technicolor</td>
<td>4050 Lankershim</td>
<td>N. Hollywood, CA 91608</td>
<td>N/A</td>
<td>11</td>
<td>13,000</td>
<td>1,503</td>
</tr>
<tr>
<td>Company</td>
<td>Address</td>
<td>City, State, Zip</td>
<td>Collective Bargaining Agreement(s):</td>
<td>Estimated # of employees to be retrained under this Agreement:</td>
<td>Total # of full-time company employees worldwide:</td>
<td>Total # of full-time company employees in California:</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------------------------------</td>
<td>--------------------------</td>
<td>------------------------------------</td>
<td>-------------------------------------------------------------</td>
<td>-------------------------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>Techital</td>
<td>144 N. Glendale Ave., Suite 301</td>
<td>Glendale, CA 91206</td>
<td>N/A</td>
<td>3</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Tech Verb</td>
<td>645 W. 9th Street, Suite 110-377</td>
<td>Los Angeles, CA 90015</td>
<td>N/A</td>
<td>5</td>
<td>9</td>
<td>9</td>
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<tr>
<td>The Los Angeles Film School</td>
<td>6363 Sunset Blvd.</td>
<td>Hollywood, CA 90028</td>
<td>N/A</td>
<td>6</td>
<td>333</td>
<td>333</td>
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<tr>
<td>Time Warner Cable</td>
<td>1970 E. Grand Avenue</td>
<td>El Segundo, CA 90245</td>
<td>N/A</td>
<td>18</td>
<td>51,600</td>
<td>18,784</td>
</tr>
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</table>
### Participating Employers in Retraine Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor's Name: Brand Consulting Group dba Brand College</th>
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</thead>
<tbody>
<tr>
<td>Reference No: 17-0225</td>
<td>Page 10 of 11</td>
</tr>
</tbody>
</table>

| Company: Turn Around Communications                        |                        |
| Address: 1325 Pico Street, Suite 101                       |                        |
| City, State, Zip: Corona, CA 92881                        |                        |
| Collective Bargaining Agreement(s): N/A                    |                        |
| Estimated # of employees to be retrained under this Agreement: 5 |                        |
| Total # of full-time company employees worldwide: 213     |                        |
| Total # of full-time company employees in California: 20  |                        |

| Company: Unitas                                           |                        |
| Address: 453 S. Spring Street, Suite 201                  |                        |
| City, State, Zip: Los Angeles, CA 90013                   |                        |
| Collective Bargaining Agreement(s): N/A                   |                        |
| Estimated # of employees to be retrained under this Agreement: 8 |                        |
| Total # of full-time company employees worldwide: 50      |                        |
| Total # of full-time company employees in California: 40  |                        |

| Company: Veterinary Centers of America                     |                        |
| Address: 12401 W. Olympic Blvd.                           |                        |
| City, State, Zip: Los Angeles, CA 90064                   |                        |
| Collective Bargaining Agreement(s): N/A                   |                        |
| Estimated # of employees to be retrained under this Agreement: 4 |                        |
| Total # of full-time company employees worldwide: 87      |                        |
| Total # of full-time company employees in California: 87  |                        |

| Company: Wesco Aircraft                                    |                        |
| Address: 27727 Avenue Scott                               |                        |
| City, State, Zip: Valencia, CA 91355                      |                        |
| Collective Bargaining Agreement(s): N/A                   |                        |
| Estimated # of employees to be retrained under this Agreement: 10 |                    |
| Total # of full-time company employees worldwide: 3,000   |                        |
| Total # of full-time company employees in California: 500 |                        |
Participating Employers in Retrainee
Multiple Employer Contracts

Contractor’s Name: Brand Consulting Group dba Brand College  CCG No.: ET17-0426
Reference No: 17-0225  Page 11 of 11

Company: Wescom Credit Union
Address: 123 S. Marengo
City, State, Zip: Pasadena, CA 91101
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 8
Total # of full-time company employees worldwide: 102
Total # of full-time company employees in California: 102

Company: West Coast Catalog
Address: 1605 W. Olympic Blvd., Suite 600
City, State, Zip: Los Angeles, CA 90015
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 4
Total # of full-time company employees worldwide: 2,279
Total # of full-time company employees in California: 2,279

Company: West Lake Distributors
Address: 5301 Rivergrade Road
City, State, Zip: Irwindale, CA 91706
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 1
Total # of full-time company employees worldwide: 48
Total # of full-time company employees in California: 34

Company: Yellow Pages
Address: 611 N. Brand Blvd.
City, State, Zip: Glendale, CA 91203
Collective Bargaining Agreement(s): N/A
Estimated # of employees to be retrained under this Agreement: 15
Total # of full-time company employees worldwide: 5,736
Total # of full-time company employees in California: 2,194

ETP 100B (1/09)
Training Proposal for:
Bricklayers and Allied Craftworkers Local #4 California Joint Apprenticeship Committee

Agreement Number: ET17-0930

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood  Analyst: M. Reeves

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprenticeship</td>
<td></td>
<td>Priority Industry:</td>
<td>Yes  No</td>
</tr>
<tr>
<td>Priority Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Veterans</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Counties Served:     | Los Angeles, Orange, San Diego, Imperial, Riverside, San Bernardino, Inyo, Mono, Tulare, Kern, Ventura, San Luis Obispo, Santa Barbara |
| Repeat Contractor:   | Yes  No |

| Union(s):            | Yes  No |
| Bricklayers and Allied Craftworkers Local #4 |

Turnover Rate: ≤20%

Managers/Supervisors: (% of total trainees) N/A

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$141,360</td>
<td>$9,780</td>
<td>$151,140</td>
</tr>
</tbody>
</table>

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

Inherent
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraining Apprentice</td>
<td>Commercial Skills</td>
<td>60</td>
<td>8-200</td>
<td>0</td>
<td>$2,002</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 144</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraining Journeyman Priority Rate</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>55</td>
<td>8-200</td>
<td>0</td>
<td>$564</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 24</td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $22.04 per hour Statewide (Priority Industry).

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

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

Up to $3.67 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 & 3.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apprentice Brickmason</td>
<td></td>
<td>60</td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Journeyman Brickmason</td>
<td></td>
<td>55</td>
</tr>
</tbody>
</table>

*The wage range varies broadly because Local #4 sponsors a variety of Apprentice programs in eight different regions (13 counties). Wages are negotiated for cost-of-living adjustment by region.*

**Journeymen wages are always proportionate to the highest-paid Apprentices, within the same region.**

### INTRODUCTION

Bricklayers and Allied Craftworkers Local #4 California Joint Apprenticeship Committee ([www.bac4ca.org](http://www.bac4ca.org)), located in the City of Arcadia, sponsors a training program for Southern California Brickmasons through its JAC (Brickmasons JAC).

Brickmasons JAC currently trains 480 Journeymen and 100 Apprentices in the brickmason trade. “Brickmasons” is the occupational title, but this encompasses numerous trades: Bricklayers, stone and marble masons, cement masons, mason finishers, plasterers, tile setters, terrazzo and mosaic workers and pointers/cleaners/caulkers.
Apprenticeship Program

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency; in this proposal the LEA is the Los Angeles Unified School District. All training will be delivered at the JAC facility in Arcadia. The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice. The Brickmasons undergo apprenticeship for 42 months, except for the Mason Finisher trade. All apprentices must be in years 2+ except for Mason Finishers (who may start at year 1 since the program length is only 24 months).

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

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5, reducing the priority industry rate from $18 to $13 per hour. In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (<100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26).

The ETP wage for Apprentices is no less than $22.04 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $22.04, for both Apprentices and Journeymen.

PROJECT DETAILS

To meet industry demands, the masonry trade trainees must find ways to reduce costs and improve the quality and precision of their work. Apprentices and Journeymen will need to acquire technical and high-level performance skills to meet standards required to complete job duties on job locations.

The Apprenticeship program offered by Brickmasons JAC teaches Apprentices the basics of the trade that include safe working conditions and procedures, materials, the use of concrete in masonry construction, laying bricks, and building walls and other particular structures. The program offers Journeymen training to learn more advanced subjects including safe working conditions and use of advanced materials.

Training Plan

Commercial Skills (70%): Training will be offered to all occupations to help workers develop high skill levels in the masonry industry. Training topics will include Brick Paving Techniques, Blueprints, Trade Math, and Cement Blocks.

Certified Safety Training

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

Training Coordination

Training will take place at the JAC facility in Arcadia and will be delivered by qualified in-house journey level staff. Instructors have extensive practical and training experience in the masonry industry which qualifies them to deliver training under this Agreement.

Administration will be performed in a partnership between Brickmasons JAC, the Los Angeles Unified School District, and Steve Duscha Advisories. Class scheduling and completion of training rosters will be conducted solely by Brickmasons JAC. Administrative vendors will assist in employer liaison, documentation of work hours, uploading training and enrollment data to ETP, and all other related administrative activities. Training will begin March 2017 and conclude approximately 18 months later.

Marketing and Support Costs

Brickmasons JAC requests 8% support costs to assist in recruitment, employer outreach, and assessment of industry job requirements. The Apprenticeship program is marketed through association web sites, mailings, and presentations. Employers participate as members of the joint committee and trust. They then develop a training curriculum that will meet employer and industry demand. In addition, the International Masonry Training and Education Foundation will assist in the design of the programs curriculum. Assessments and recruitment will continue to take place throughout the duration of the Agreement. Staff recommends the 8% support costs.

Learning Management System

Staff has reviewed and approved Brickmasons JAC’s Learning Management System for recordkeeping.

Commitment to Training

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0919</td>
<td>$99,114</td>
<td>02/01/16 – 01/31/18</td>
<td>61</td>
<td>77</td>
<td>*TBD</td>
</tr>
</tbody>
</table>
*Based on ETP Systems, 7,898 reimbursable hours have been tracked for potential earnings of $109,782 (111% of approved amount).

**DEVELOPMENT SERVICES**

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of $5,000.

**ADMINISTRATIVE SERVICES**

Steve Duscha Advisories and the Los Angeles Unified School District 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

- Advanced Blueprint Reading
- Arches (Types, Hands-On Project)
- Bricklaying Terminology
- Brick-Paving Techniques
- Building a Straight Wall
- Building Codes-Reinforced Grouted Masonry
- Cement Blocks and Bricks
- Complete a Masonry Wall
- Components and Shell Bricks
- Concrete in Masonry Units
- Construction of Jambs
- Construction of Pilasters
- Custom Residential Work
- Glass Blocks
- Glazed Tiles
- Interpret and Use Blueprints
- Job Layouts/Steps Related to Layout
- Journeyman Duties
- Learn How to Construct a Firebox
- Learn How to Construct a Fireplace Flue
- Learn How to Construct Fireplace and Footings
- Learn How to Construct Hearths
- Learn How to Construct Roof Anchors
- Learn the Code Requirements for Construction of a Fireplace
- Learn the Communications Skills Required of a Job Supervisor
- Learn the Construction of Fireplaces, Kilns, and Furnaces by Using Refractory or Fire Brick
- Learn the Duties of a Foreman and His/Her Career Advancement Possibilities
- Learn to Construct a Fireplace Throat
- Materials-Veneer Construction
- Materials-Residential Masonry Design
- Parging in Masonry Construction
- Patterns-Bonded Masonry
- Planning and Construction of Custom Masonry
- Recognize the Terms Used with Reinforced Grouted Masonry
- Responsibilities of a Job Supervisor
- Safety, Health and Employment Rules and Procedures
- Scaffolding Safety Practices
- Shop Safety Rules and Procedures
- Shop Safety Rules for Operating Tools and Equipment
- Solve Problems in Masonry Mathematics
• Stick-On Veneer
• Stones
• Techniques for Setting and Laying Bricks
• Trade Math
• Various Types of Veneer Applied to a Fireplace

**Journeyman Training**

**COMMERCIAL SKILLS**

• Advanced Materials
• Safe Working Procedures and Practices
• Scaffold Safety

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

• OSHA 10 (Requires completion of full 10-hour course)
• OSHA 30 (Requires completion of full 30-hour course)

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:

Employers Group Service Corp.

Agreement Number: ET17-0399

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Paccerelli

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainer Rate</th>
<th>Industry Sector(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Priority Rate</td>
<td>Manufacturing</td>
</tr>
<tr>
<td></td>
<td>SB &lt;100</td>
<td>Engineering Services</td>
</tr>
<tr>
<td></td>
<td>HUA</td>
<td>Technology/Other</td>
</tr>
</tbody>
</table>

| Counties Served: | Statewide |

<table>
<thead>
<tr>
<th>Repeat Contractor:</th>
</tr>
</thead>
</table>

| Union(s): | Yes No |

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors: (% of total trainees)</th>
</tr>
</thead>
</table>

### FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$563,320</td>
<td>$38,770 8%</td>
<td>$602,090</td>
</tr>
</tbody>
</table>

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

$317,720
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineen</td>
<td>Continuous Impr., Mfg. Skills; Business Skills; Computer Skills; Literacy Skills</td>
<td>60</td>
<td>8-200 0-40</td>
<td>$802</td>
<td>$16.16</td>
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<tr>
<td></td>
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<td>8-200 0-40</td>
<td>$808</td>
<td>$16.16</td>
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<td></td>
<td>Priority Rate</td>
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<td>Weighted Avg:</td>
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<td></td>
</tr>
<tr>
<td>3</td>
<td>Retraineen SB&lt;100</td>
<td>Continuous Impr., Mfg. Skills; Business Skills; Computer Skills; Literacy Skills</td>
<td>30</td>
<td>8-200 0-40</td>
<td>$800</td>
<td>$16.16</td>
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<td>4</td>
<td>Retraineen Priority SB&lt;100</td>
<td>Continuous Impr., Mfg. Skills; Business Skills; Computer Skills; Literacy Skills</td>
<td>245</td>
<td>8-200 0-40</td>
<td>$778</td>
<td>$16.16</td>
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<td>Weighted Avg:</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Retraineen HUA Priority</td>
<td>Continuous Impr., Mfg. Skills; Business Skills; Computer Skills; Literacy Skills</td>
<td>10</td>
<td>8-200 0-40</td>
<td>$808</td>
<td>$12.12</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg:</td>
<td>42</td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Hourly Wage by County:**

*Job Numbers 1-4:* $17.63 for Alameda, Contra Costa, Marin, San Francisco, San Mateo and Santa Clara counties; $16.96 for Los Angeles County; $17.22 for Orange County; $16.72 for San Diego County; $16.46 for Sacramento County, and $16.16 for all other counties.

*Job Number 5:* $13.22 for Alameda, Contra Costa, Marin, San Francisco, San Mateo and Santa Clara Counties; $12.72 for Los Angeles County; $12.92 for Orange County; $12.54 for San Diego County; $12.34 for Sacramento County, and $12.12 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 health benefits to meet the Post-Retention Wage.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
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<tbody>
<tr>
<td><strong>Job Numbers 1-4</strong></td>
<td></td>
<td></td>
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<tr>
<td>Administrative/Support Staff</td>
<td></td>
<td>54</td>
</tr>
<tr>
<td>Customer Service Staff I</td>
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<td>22</td>
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<tr>
<td>Customer Service Staff II</td>
<td></td>
<td>50</td>
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<tr>
<td>Engineer/Designer I</td>
<td></td>
<td>36</td>
</tr>
<tr>
<td>Engineer/Designer II</td>
<td></td>
<td>28</td>
</tr>
<tr>
<td>Finance/Accounting Staff</td>
<td></td>
<td>18</td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1896, Employers Group Service Corp. (Employers Group) (www.employersgroup.com), is a non-profit trade association specializing in Human Resources (HR) Management. It offers several programs and services for its members including: telephone support and public workshops for HR professionals; consulting services on affirmative action planning and employee relations; surveys on compensation and benefits trends; and training in compliance, leadership, quality, productivity enhancement, and Lean Manufacturing.

Employers Group’s funding is derived from membership dues and service fees. Members represent every industry (manufacturing, engineering, technology, transportation, and service-related businesses). They range in size from Fortune 500 companies to start-up ventures, with the majority of members having 10 to 200 employees.

PROJECT DETAILS

This will be Employers Group’s 11th ETP Agreement. The training in this proposal is designed to improve workplace issues. All training is highly interactive with practice in a lab setting to transfer skills to trainees’ jobs. Training will provide workers skills needed for long term employment while assisting to realize company goals and objectives.

There is high demand from participating employers seeking to increase productivity through process improvement and Lean manufacturing. These employers use Employers Group’s training to streamline operations for efficiency using Lean concepts and methodologies:
• provide soft skills that improve productivity;
• promote and hire employees into positions that require interpersonal and teamwork skills;
• implement quality measures through process controls and specifications;
• overcome internal issues such as communication, teamwork, motivation and delegation;
• increase internal and external coordination for production; and
• solve process-related issues, including reduction of waste, scrap, re-work, excess inventory and downtime.

Training Plan

Continuous Improvement (70%) – Training will be offered to all occupations. Training will enhance communications, build teamwork, reduce conflict, create more engagement, identify process improvement opportunities, streamline operations and promote efficiency. Trainees will be encouraged to identify and utilize problem solving techniques to make decisions and implement solutions to reduce or eliminate waste, scrap, re-work, excess inventory, and downtime.

Business Skills (10%) – Training will be offered to all occupations in foundational soft skills including sales, marketing, finance, customer service, and writing. Training will increase customer service-related skills and team building techniques. Individuals will also learn time management and measurement techniques that will allow them to maximize their productivity.

Computer Skills (10%) – Training will be provided to Administrative/Support, Customer Service, Finance/Accounting, Operations, Production, Inspection/Quality, and Technical Staffs, Leads, and Supervisors/Managers. Training will include software programs, software proficiency and productivity.

Manufacturing Skills (8%) – Training will be provided to Production, Operations and Supervisors/Managers to utilize equipment properly, identify improvement opportunities, utilize statistical process controls in identifying failure rates, reducing scrap, increase productivity and provide better products/services. Other courses will focus on the use and maintenance of equipment, tools, and machinery; up-to-date manufacturing techniques and good manufacturing practices; upgraded warehousing and distribution methods; and cross-training.

Literacy Skills (2%) – Training will be provided to Production, Operations and Warehouse/Logistic Staff to overcome communication problems with their peers and supervisors and better understand written/verbal instructions and workplace documentation. VESL courses will enable trainees to participate in larger-group training programs delivered principally in English, interact in teams, improve jobs skills, and increase promotional opportunities.

Computer-Based Training (CBT)

Training in Business Skills and Continuous Improvement will also be provided via Computer-Based training (CBT) up to 40 hours per trainee. CBT will serve as a prerequisite or supplement to class/lab training. CBT is capped at 50% of total training hours per trainee.

Curriculum Development

Employers Group delivers hundreds of training programs each year, keeping abreast of the training topics employers need to be more successful. Employers Group also monitors other training programs, industry trends, and professional developments related to adult learning and employer-specific training. Employers Group continuously obtains client feedback on continuous improvement efforts, developing new training materials and marketing activities accordingly.

Employers Group meets with each prospective employer to assess training needs and build a company-specific curriculum. The process includes assessments, interviews, focus groups, meetings, and feedback from human resources, executives, and senior management. Company-
specific documents, terminology, forms, manuals, and case studies are incorporated into developing training materials. Employers Group works with companies to prioritize training needs, identify trainees, and develop a workable training schedule.

After completing each training module, trainees complete evaluations which are used to refine the curriculum, training materials, and training delivery. Evaluations provide feedback to trainers and Employers Group staff on the effectiveness of training.

Commitment to Training

Many employers have eliminated existing training budgets due to recessionary pressures, and only deliver essential training such as safety, new-hire orientations, basic job skills, and compliance-related training using internal training personnel, experienced workers, or vendors. Some employers have a small training budget, with limited participants and training scope. Most training is introductory.

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

Marketing and Support Costs

Participating employers are recruited primarily from the Employers Group membership database, Employers Group also recruits through its website, web search optimization, emails, and regular weekly promotions and announcements. Staff also produces a training catalog, mails postcards, conducts no-cost webinars, holds in-person employer roundtables, and displays exhibits at conferences. Training specialists meet directly with employers to discuss training needs (including employer and trainee needs assessments), training objectives, and how ETP funding can be used to offset larger-scale training initiatives.

Employers Group partners with BizFed and many Chambers of Commerce (Costa Mesa, San Francisco, Eastville, Fontana, Poway, Lakewood, San Benito, National City, Hermosa Beach, Oakland, Emeryville, Los Angeles, Oxnard, Stanton, and Anaheim) to help serve its constituencies (especially very small businesses), conducting human resource training, roundtable briefings, online learning sessions, and workshops.

There are currently 13 full-time staff responsible for marketing, employer recruitment, assessment, scheduling and ETP administration. Employers Group requests 8% support costs for the ongoing employer recruitment and assessment activities associated with this program. As a non-profit entity, Employers Group relies heavily on support funding to promote ETP training and facilitate individual employer meetings to discuss ETP requirements, assess training needs, and complete and process ETP Certification Statements. Support costs also cover web development costs used in marketing. In addition, Employers Group’s new online portal and needs assessments site help employers completing their initial eligibility questionnaire. Staff recommends 8% Support Costs.

High Unemployment Area

The 10 trainees in Job Number 5 work in High Unemployment Areas (HUA), regions with unemployment exceeding the state average by at least 25%. These participating employees are located in Los Angeles, Orange, Kern, Riverside, Ventura, and San Bernardino Counties.

- 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. Employers Group is requesting the 25%
HUA waiver for trainees in Job Number 5 (wages are listed on page 2, Minimum Hourly Wage by County).

**Tuition Reimbursement**

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. This representation will be made a condition of the Agreement.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

The following table summarized performance by Employers Group under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
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</thead>
<tbody>
<tr>
<td>ET16-0113</td>
<td>$799,450</td>
<td>08/04/2015–08/03/2017</td>
<td>536</td>
<td>450</td>
<td>436</td>
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</tbody>
</table>

Based on ETP Systems, 37,314 reimbursable hours have been tracked for potential earnings of $639,560 (88% of approved amount). However, the Contractor projects final earnings of 100% based on training in progress and committed through February 2017.

**PRIOR PROJECTS**

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

<table>
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<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
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<tbody>
<tr>
<td>ET14-0282</td>
<td>Statewide</td>
<td>02/18/2014–02/17/2016</td>
<td>$487,809</td>
<td>$487,809</td>
<td>(100%)</td>
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<tr>
<td>ET12-0321*</td>
<td>Statewide</td>
<td>06/30/2012–06/29/2014</td>
<td>$749,635</td>
<td>$456,875</td>
<td>(61%)</td>
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<tr>
<td>ET11-0193</td>
<td>Statewide</td>
<td>05/10/2011–05/09/2013</td>
<td>$398,483</td>
<td>$370,064</td>
<td>(93%)</td>
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</tbody>
</table>

*ET12-0321: The low completion rate was caused by a late training start by some participating employers. Due to production demands, some employers were not able to release employees from normal work duties to attend training. Other employers decided to provide training on their own without ETP funding to provide more flexibility in scheduling.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT
Adapting to Change
Benchmarking
Building Successful Teams
Business Process Re-Engineering
Capacity Analysis
Coaching and Giving/Receiving Feedback
Communicating Effectively
Continuous Process Improvement/Need for Change
Creating and Building Teamwork
Data Collection
Dealing with Conflict/Difficult Attitudes
Decision Making
Delegating with Purpose
Effective Correction Action
Executing Strategy at the Frontline
Fostering Innovation
Identifying Waste
Implementing Solutions
Implementing Statistical Process Control
Internal Auditing
Interpreting and Analyzing Data
ISO 9000 Overview
Leadership Essentials/Leading Others
Lean Manufacturing/Thinking
Lean Sigma
Lean 5S Methodology
Load/Line Balancing
Kaizen Methodology
Kanban Principles
Meeting for Results
Motivating Others
Optimal Operating Methods
Organizational Roles and Personality Styles (identifying styles)
Organizing and Setting Goals
Performance Improvement Through Performance Management
Planning
Problem Solving
Process Improvement Methodologies
Process Mapping
Pull System
Role of the Lead
Root Cause Analysis
Setting Goals & Reviewing Results
Setting Standards
Six Sigma
Standardizing Processes
Statistical Process Control Concepts, Theory, Application
Supply Chain Management
Taking Ownership
Team Problem Solving
Time Management and Delegation
Total Quality Management Principles
Using Behavior Styles
Value Stream Mapping
Work Flow/Measurement

MANUFACTURING SKILLS
Assembly Procedures
Blueprint Reading
Concurrent Engineering
Design for Manufacturability
Drawing and Measurement Tools
Equipment Operations
ERP Systems
Failure Modes & Effects Analysis (FMEA)
Functional Design Review
Gage Design
Geometric Tolerancing
Good Manufacturing Practices (GMP)
Graphical Inspection Analysis
Inspection and Gauging
Job Instruction/Analyzing Jobs for Efficiency
Line Set-Up / Tear Down
Manufacturing Practices
Maintenance Procedures
Mechanical Inspection
Operations and Processes
Product Quality Guarantees (PQG)
Production Operations
Set-Up Reduction
Shop Math
State Quality Food (SQF)
Statistical Process Control (SPC)
SPC for Short Runs
Tolerance Stack-up Analysis
Warehousing Operations and Distribution

BUSINESS SKILLS
Behavior Style Strategies/Using Behavior Styles to Improve Interpersonal Relationships and Teamwork
Budgets
Building & Sustaining Trust
Business Writing and Grammar
Cost Control
Creative Problem Solving and Innovative Solutions
Customer Service
Difficult Situations
Effective Meeting Skills
Engaging & Retaining Talent
Facilitation Skills
Financial Analysis
Financial Reports
Implementing a Plan/Solution
Interpersonal Skills/Communication Skills
Leading Virtually
Marketing and Product Knowledge
Meeting Management Skills
Negotiating
Networking for Enhanced Collaboration
Payroll Systems, Accounting
Presentation Skills
Project Management
Relationship Building Through Sales and Service
Sales Strategies and Skills
Seven Habits of Effectiveness
Strategies for Influencing
Strengthening Partnerships
Time Management
Valuing Differences

**COMPUTER SKILLS**

Access
Computer-Aided Design and Manufacturing
Database Management
Email Communications
Excel
Graphics
Internet and HTML
Inventory Control
Manufacturing Resource Planning
Microsoft Office*
Operating Systems
PowerPoint and Presentations
Programming
Project Planning and Controlling
Publishing
Software Applications
Spreadsheets
Supply Chain Management
Website Development & Maintenance
Windows
Word

*Small employers may receive all levels of Microsoft Office training. Large employer may only receive intermediate-or advanced-level training.*
**LITERACY SKILLS**
- Basic Workplace Terminology
- Co-worker Communications
- Collecting and Recording Data
- Comprehension Skills
- Following Verbal/Written Directions and Work Orders
- Math Fundamentals (applying to job functions)
- Oral Communication
- Process Terminology
- Solving Customer Problems
- Understanding Manuals and Reports
- Terminology for Workplace Safety Practices
- Writing Reports and Letters
- Written Communications

**Literacy skills cannot exceed 45% of total training hours.**

**CBT HOURS**
0-40

**BUSINESS SKILLS**

**Business Writing**
- Being Effective (1 hour)
- Letters and E-mails (1 hour)
- Reports and Proposals (1 hour)

**Change Management**
- Coping With Change (1 hour)
- Managing Change (1 hour)

**Communication Skills**
- Advanced Coaching (2 hours)
- Coaching for Peak Performance (2 hours)
- Communicating as a Team (1 hour)
- Communicating for Leadership Success (2 hours)
- Communicating with Impact (2 hours)
- Individual Listening Skills (1 hour)
- Communicating Non-Verbally (1 hour)
- Enhancing Your Speaking Skills (1 hour)
- Report Organization and Presentation (1 hour)
- Resolving Workplace Conflict (2 hours)
- Presentation Skills (1 hour)
- Email Etiquette (1 hour)

**Customer Service Skills**
- Communication Basics (1 hour)
- Developing Strong Customer Relationships (1 hour)
- Customer Loyalty (1 hour)
- Handing Difficult Customers (1 hour)
- Creating Winning Impressions (1 hour)
- Creating Valuable Customer Relationships (1 hour)
- Communicating Proactively (1 hour)
- Work Process Basics (1 hour)
- Practice Active Listening (1 hour)
- Writing Effective E-mails (1 hour)
- Taking the Heat (2 hours)
- Telephone Techniques (1 hour)

**Financial Statements (Introduction to) (4 hours)**

**Marketing**
- Basics (1 hour)
- Opportunities (1 hour)
- Customer Service (1 hour)

**Negotiating for Success** (1 hour)

**Framework for Excellence**
- Introduction to Excellence (30 minutes)
- Leadership (30 minutes)
- Planning (30 minutes)
- Customer (30 minutes)
- People Focus (30 minutes)
- Process Management (30 minutes)
- Supplier/Partner (30 minutes)
- Organizational Performance (30 minutes)

**Supplier Management**
- Supply Positioning (1 hour)
- Market Assessment (1 hour)
- Supplier Appraisals (1 hour)
- Market Matrix (1 hour)
- Vulnerability Management (1 hour)
- Supplier Selection (1 hour)
- Contract Award (1 hour)
- Supplier Case Study 1 (1 hour)
- Supplier Case Study 2 (1 hour)
- Supplier Case Study 3 (1 hour)
- Finance Reports (1 hour)
- Finance Ratios (1 hour)
- Costing Methods (1 hour)
- Pricing Policy (1 hour)
- Pricing Case Study 1 (1 hour)
- Shaping the Market (1 hour)
- Defining and Management Need (1 hour)
- Procurement Marketing (1 hour)
- Supplier Improvement (1 hour)
- Reverse Marketing (1 hour)
- Contract Strategy (1 hour)
- Partnerships (1 hour)
- Integration (1 hour)
- Defining Negotiation (1 hour)
- Using Persuasion (1 hour)
- Planning for Negotiation (1 hour)
- Negotiating Tactics (1 hour)
- Fabric of Negotiation (1 hour)
- Power/Interest Cycle (1 hour)

**Project Management**
- Getting Read (1 hour)
- The Basics (1 hour)
- Goals and Stakeholders (1 hour)
- Project Management (1 hour)
- Projects and Risk Management (1 hour)

**Report Organization and Presentation** (1 hour)

**Running Effective Meetings** (1 hour)

**Strategies for Meeting Goals** (1 hour)

**Systematic Selling**
- Getting the Appointment (1 hour)
- Planning the Call (1 hour)
- Establishing Rapport (1 hour)
- Identifying Objectives (1 hour)
- Making a Recommendations (1 hour)
- Handling Obstacles (1 hour)
- Gaining Commitment/Following Up (1 hour)
- Self-Assessment and Review (1 hour)

**Time Management** (1 hour)

**Working With Customers**
- Customer Support (1 hour)
- Customer Support Online (1 hour)
- Customer Loyalty Improvement (1 hour)
- Developing Strong Customer Relationship (1 hour)
- Handling Difficult Customers (1 hour)
- Creating Valuable Customer Relationships (2 hrs)
- Helping and Keeping Clients (2 hrs)
- Providing Quality Service (2 hrs)
- Identifying Customer Service Outcomes (2 hrs)
- Providing Service Excellence (2 hrs)
- Diffusing Tense Situations (2 hrs)
- Essential Multicultural Communication (2 hrs)
CONTINUOUS IMPROVEMENT

Team Building
- Addressing Poor Performance (2 hours)
- Acting Effectively on a Team (1 hour)
- Building Trust (2 hours)
- Delegating with Purpose (2 hours)
- Leading Virtually (2 hours)
- Running Effective Teams (1 hour)
- Making Meetings Work (2 hours)
- Retaining Talent (2 hours)

Problem Solving and Decision Making
- Driving Change (2 hours)
- Making High Quality Decisions (2 hours)
- Problem Solving in the Workplace (1 hour)
- Problem Solving: 5 Steps (1 hour)
- Work Process Basics (1 hour)
- Individual Leadership Power (1 hour)
- Developing a Strong Team (1 hour)
- Team Problem Solving (1 hour)

Leading People
- Conflict Management (1 hour)
- Delegation (1 hour)
- Meeting Effectiveness (1 hour)
- Individual Leadership Power (1 hour)
- Running Effective Meetings (1 hour)
- Running Effective Teams (1 hour)
- Team Problem Solving (1 hour)
- Effective Leadership (1 hour)
- Working Well with Others (1 hour)
- Communicating Proactively (1 hour)
- Communicating Reactively (1 hour)
- Using Leadership Basics (1 hour)
- Employee Motivation (1 hour)
- Change Management (1 hour)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of delivery method. CBT is capped at 50% of a trainee’s total training hours.
<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s)</th>
<th>Estimated # of employees to be retrained under this Agreement</th>
<th>Total # of full-time company employees worldwide</th>
<th>Total # of full-time company employees in California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acushet</td>
<td>2819 Loker Ave. East</td>
<td>Carlsbad, CA 92008</td>
<td>N/A</td>
<td>50</td>
<td>449</td>
<td>444</td>
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<tr>
<td>Cancer Genetics</td>
<td>1640 Marengo St.</td>
<td>Los Angeles, CA 90033</td>
<td>N/A</td>
<td>20</td>
<td>180</td>
<td>58</td>
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<tr>
<td>Chicken of the Sea Frozen Foods</td>
<td>222 N. Sepulveda Blvd., Ste. 1550</td>
<td>El Segundo, CA 90245</td>
<td>N/A</td>
<td>30</td>
<td>68</td>
<td>44</td>
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<tr>
<td>Coastal Pacific Food Distributors</td>
<td>1015 Performance Dr.</td>
<td>Stockton, CA 95206</td>
<td>N/A</td>
<td>60</td>
<td>560</td>
<td>456</td>
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<tr>
<td>Company</td>
<td>Address</td>
<td>City, State, Zip</td>
<td>Collective Bargaining Agreement(s):</td>
<td>Estimated # of employees to be retrained under this Agreement:</td>
<td>Total # of full-time company employees worldwide:</td>
<td>Total # of full-time company employees in California:</td>
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<tr>
<td>-------------------------------</td>
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<tr>
<td>Core Health &amp; fitness</td>
<td>20 Empire Dr.</td>
<td>Lake Forest, CA  92630</td>
<td>N/A</td>
<td>25</td>
<td>423</td>
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<td>Everbridge</td>
<td>155 N. Lake Ave., Ste. 900</td>
<td>Pasadena, CA 91101</td>
<td>N/A</td>
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<td>206</td>
<td>122</td>
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<tr>
<td>Glaukos corporation</td>
<td>229 Avendia Fabricante</td>
<td>San Clemente, CA  92672</td>
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<tr>
<td>Innovative Employee Solutions</td>
<td>9665 Granite ridge Dr.</td>
<td>San Diego, CA  92123</td>
<td>N/A</td>
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<tr>
<td>Company</td>
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<td>City, State, Zip</td>
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<td>Estimated # of employees to be retrained under this Agreement</td>
<td>Total # of full-time company employees worldwide</td>
<td>Total # of full-time company employees in California</td>
</tr>
<tr>
<td>-----------------------------</td>
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<tr>
<td>Maury Microwave</td>
<td>2900 Inland Empire Blvd.</td>
<td>Ontario, CA 91764</td>
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<td>95</td>
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<tr>
<td>Meyer Sound Laboratories</td>
<td>2832 San Pablo Ave.</td>
<td>Berkeley, CA 94702</td>
<td>N/A</td>
<td>15</td>
<td>260</td>
<td>245</td>
</tr>
<tr>
<td>Perkowitz + Ruth Architects</td>
<td>245 East Third St.</td>
<td>Long Beach, CA 90802</td>
<td>N/A</td>
<td>25</td>
<td>166</td>
<td>117</td>
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<tr>
<td>Sunny Delight Beverages</td>
<td>1230 N. Tustin Ave.</td>
<td>Anaheim, CA 92807</td>
<td>N/A</td>
<td>40</td>
<td>400</td>
<td>75</td>
</tr>
</tbody>
</table>
### Participating Employers in Retraining

**Multiple Employer Contracts**

<table>
<thead>
<tr>
<th>Contractor’s Name: Employers Group Services Corp.</th>
<th>CCG No.: ET17-0399</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No: 17-0183</td>
<td>Page 4 of 4</td>
</tr>
</tbody>
</table>

#### Company: Ultramet
- **Address:** 12173 Montague St.
- **City, State, Zip:** Pacoima, CA 91331
- **Collective Bargaining Agreement(s):** N/A
- **Estimated # of employees to be retrained under this Agreement:** 40
- **Total # of full-time company employees worldwide:** 76
- **Total # of full-time company employees in California:** 76

#### Company: Watkins Wellness
- **Address:** 1280 Park Center Dr.
- **City, State, Zip:** Vista, CA 92129
- **Collective Bargaining Agreement(s):** N/A
- **Estimated # of employees to be retrained under this Agreement:** 200
- **Total # of full-time company employees worldwide:** 1,500
- **Total # of full-time company employees in California:** 350

#### Company: Wilden Pump
- **Address:** 22069 Van Buren St.
- **City, State, Zip:** Grand Terrace, CA 92313
- **Collective Bargaining Agreement(s):** N/A
- **Estimated # of employees to be retrained under this Agreement:** 50
- **Total # of full-time company employees worldwide:** 500
- **Total # of full-time company employees in California:** 275
Training Proposal for:
Kern County Electrical Joint Apprenticeship & Training Committee
Agreement Number: ET17-0925

Panel Meeting of: February 23, 2017
ETP Regional Office: North Hollywood          Analyst: L. Vuong

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Apprenticeship</th>
<th>Priority Rate</th>
<th>Veterans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>☒ Yes</td>
<td>☐ No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Kern</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repeat Contractor:</td>
<td>☒ Yes</td>
<td>☐ No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>☒ Yes</td>
<td>☐ No</td>
<td>International Brotherhood of Electrical Workers, Local 428</td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>≤20%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>+</th>
<th>Support Costs</th>
<th>=</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$269,000</td>
<td>+</td>
<td>$18,600</td>
<td>8%</td>
<td>$287,600</td>
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</table>

In-Kind Contribution: 50% of Total ETP Funding Required
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainees Journeyman</td>
<td>Business Skills, Commercial Skills, Computer Skills, OSHA 10/30</td>
<td>50</td>
<td>8-200</td>
<td>$470</td>
<td>$37.65</td>
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<td>Priority Rate</td>
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<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainees Apprentice</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>90</td>
<td>8-210</td>
<td>$2,720</td>
<td>$22.59</td>
</tr>
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<td></td>
<td>Priority Rate</td>
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<td></td>
<td>Weighted Avg: 200</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Retrainees Apprentice</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>5</td>
<td>8-210</td>
<td>$2,720</td>
<td>$22.59</td>
</tr>
<tr>
<td></td>
<td>Priority Rate</td>
<td></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Veterans</td>
<td></td>
<td></td>
<td>Weighted Avg: 200</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $22.59 per hour SET Statewide Priority Industry.

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

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

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

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range*</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job No. 1: Journeyman Electrician/Inside Wireman</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Job No. 2: Apprentice Electrician/Inside Wireman</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td>Job No. 3: Apprentice Electrician/Inside Wireman (Veterans)</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

### INTRODUCTION

Kern County Electrical Joint Apprenticeship & Training Committee (Kern Electrical JATC) ([www.ibew428.org](http://www.ibew428.org)) is a nonprofit training organization dedicated to providing up-to-date industry skills training and secure high-quality job opportunities for its members. Founded over 52 years ago, the JATC trains Electricians to install power, lighting, controls and other electrical equipment in commercial, industrial and residential facilities.

Kern Electrical JATC is governed by a Board of Trustees comprised of three labor and three management representatives, and is a joint effort of the International Brotherhood of Electrical Workers (IBEW) Local 428 and the National Electrical Contractors Association (NECA).
Kern County Electrical JATC February 23, 2017 ET17-0925

Kern County is California’s leading oil producing county and also builds many of the state’s utility solar farms. As a major contributor to the state’s energy and agricultural resources, this county needs trained electricians to help the state meet demand. Kern Electrical JATC is located in Bakersfield and proposes to train Journeymen and Apprentice Electricians, all of whom are members of IBEW Local 428.

Multiple participating employers and union representatives have identified the following reasons for training: new energy efficiency regulations, the need to reduce costs to remain competitive, the need for higher quality standards, the increasing complexity of construction projects, and a retiring workforce.

Kern Electrical JATC will provide training to workers for commercial, industrial and oil field projects with local signatory contractors. Journeyman and Apprentice Electricians will be working on utility grade solar projects that are both planned and currently under construction. Furthermore, Kern Electrical JATC anticipates to train additional electricians for a High Speed Rail, a 30-mile stretch northwest of Bakersfield as construction begins in 2017. Most of these projects are expected to reach completion in 2018. In addition, it is anticipated that some of the electricians trained under this proposal will work on oil refinery upgrade projects, as well as on a local Hydrogen Energy California plant that is projected to be operational in the near future.

Apprenticeship Pilot

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). The Panel provides reimbursement for the Related and Supplemental Instruction (RSI) portion of an apprenticeship-training program. RSI is delivered as class/lab training that is developed with a Local Educational Agency (Kern Community College District) and approved by DAS. The program provides reimbursement for 200 hours of RSI plus OSHA 10. All training will be class/lab.

For the building trades, where it is not customary for workers to be employed for 90 consecutive days with one employer, the Panel may substitute hours worked for retention. The modified retention period must be no less than 500 hours within 272 days with more than one employer. Kern Electrical JATC is requesting this modified retention period.

To ensure ETP does not displace Montoya Funds, Apprenticeship Pilot reimbursement is reduced by $5.00, reducing the priority industry rate from $18.00 to $13.00 per hour. This is the Special Employment Training Statewide wage as modified for priority industries, which is being used for all apprentice occupations. Trainees in Job Numbers 2 and 3 qualify as SET High Wage, exceeding the State Average Hourly Wage of $22.59 per hour.

The ETP wage for Apprentices is no less than $22.04 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $22.04, for both Apprentices and Journeymen.

PROJECT DETAILS

To meet current and future demand for electrical industry workers, Kern Electrical JATC will provide a curriculum in Business Skills, Commercial Skills, Computer Skills and OSHA 10/30 and training for both large and small employers. The proposed training, entirely center-based, is scheduled to commence the week following Panel approval.
Training Plan

The following classes will be offered to **Journeymen**:

**Commercial Skills (80%)** - Green training will be the focus due to the demand for energy efficient construction methods and technologies. Training will cover energy-efficient technologies and products such as green building materials, solar photovoltaic panels, new motor controls, advanced welding, green materials testing and audit equipment.

**Business Skills (5%)** – Electricians must understand new national building codes and green practices; follow certification guidelines; use more collaborative bidding and project development practices; meet budgets; interact with various types of construction workers; and implement green solutions in traditional work environments. Training will give workers the tools to plan, organize, and manage their construction projects more efficiently. Training will also include teambuilding and leadership skills so that electricians can lead teams in an effective and efficient manner.

**Computer Skills (5%)** - Training will include scheduling, planning and modeling software. AutoCAD and Job Tracking applications will provide trainees with the tools to modify blueprints, look up project requirements, build budgets and timelines, design virtual buildings, and adjust computerized control systems.

**OSHA 10/30 (10%)** - OSHA 10/30 training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of training for journey-level and 30 hours for frontline supervisors. 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 provides a complete overview of occupational safety and health so that workers are more knowledgeable about workplace hazards and understand their rights as workers. Equipment and materials not used correctly can also lead to injuries for the worker and puts other people in the area in potential danger.

The following classes will be offered to **Apprentices**:

**Commercial Skills (90%)** - Apprentices will learn to install, maintain, and repair various types of electrical and electronic equipment in commercial, industrial and residential establishments. They will also learn to install, connect and test electrical wiring systems for lighting, heating, air conditioning and communications for any building or structure. This training will provide the skills to perform the following:

- Installing New Wiring and Repairing Old Wiring
- Installing Receptacles, Lighting Systems and Fixtures
- Troubleshooting and Repairing Electrical Systems
- Establishing Grounding Systems
- Installing Service to Buildings and Other Structures
- Providing Power and Controls to Motors, HVAC, and Other Equipment
- Installing Fire Alarm and Security Systems
- Installing, Maintaining and Repairing Lightning Protection Systems
**OSHA 10/30 (10%)** - Electricians work under extremely dangerous conditions which require considerable physical effort on the part of the Apprentice such as lifting, climbing, crouching, and working in cramped areas. With the potential for serious injury or death of workers and/or others in the vicinity of the work area, participating employers and property owners need electricians to undergo additional training to ensure that their skills are up to date and that work is performed with optimal efficiency and safety. 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.

**Curriculum Development**

The Curriculum was developed and customized with input from both labor and management representatives to address the local needs of union members, participating employers and the industry as a whole. IBEW Local 428 was directly involved in the development of the Curriculum and training plan, and is in full support of the proposed training for its members.

The Apprentice program uses the National Joint Apprenticeship and Training Committee’s Curriculum which was developed for the exclusive use of IBEW-NECA JATCs.

**Trainer Qualifications**

Kern Electrical JATC has three full-time and seven part-time trainers. All trainers are former or current members of the trade and some have received Master Certification status by the National Joint Apprenticeship and Training Committee.

**Marketing and Support Costs**

Kern Electrical JATC conducts marketing through direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and its website. Class information will be disseminated throughout the year to all apprentice and journeyman electricians within the jurisdiction, as well as to the electrical contractors who employ them.

Two staff people in the JATC office will assist with marketing, recruitment, needs assessments and scheduling. Kern Electrical JATC is requesting 8% support costs to fund its staff in recruiting and qualifying additional participating employers for this program. Many participating employers have already been recruited; however, additional recruitment and assessment activities are anticipated. Staff recommends the 8% support costs.

**Commitment to Training**

 Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. Safety training is provided by the participating employers in accordance with all pertinent requirements under state and federal law.

**Tuition Reimbursement**

Kern Electrical JATC represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. This representation will be made a condition of the Agreement.
Veterans Program

Kern Electrical JATC is currently working to attract veterans through its website, advertises special days for Veterans to come and participate in job fairs. As such, Kern Electrical JATC is including a separate Job Number (Job Number 3) for training five Veterans. The Veterans training curriculum will be the same as the Apprentice training outlined above.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by Kern Electrical JATC under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
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</thead>
<tbody>
<tr>
<td>ET15-0920</td>
<td>$313,795</td>
<td>02/23/15 – 02/22/17</td>
<td>139</td>
<td>210</td>
<td>210</td>
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</table>

Based on ETP Systems, 23,165 reimbursable hours have been tracked for potential earnings of $337,913. The Contractor projects final earnings of 100% based on training completed November 21, 2016.

DEVELOPMENT SERVICES

Kern Electrical JATC retained the California Labor Federation (CalFED) in Sacramento and Strategy Workplace Communications (Strategy) in Oakland to assist with development of this proposal at no charge.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 200 (Job Number 1)

Trainees may receive any of the following:

Journeyman Training

COMMERCIAL SKILLS

- Codeology:
  - National Electrical Code
  - Other Recognized Standards (Installation Changes)
  - Plan, Build and Use
  - Related Standards (Mandatory and Permissive Rules)
  - Special Occupancies and Equipment
  - Arc Flash

- Analog/Digital Circuit (AC/DC) Principles:
  - Math for Electricians
  - Ohm’s Law
  - Generators
  - Inductance/Reactance
  - Series/Parallel Circuits

- Grounding:
  - Grounding and Bounding
  - National Electrical Code Article 100-Definitions and Provisions
  - National Electrical Code Article 110-Requirements
  - National Electrical Code Article 90-Introduction
  - National Electrical Code Article Chapters 1-4
  - Significant Changes to National Electric Code

- Fire Alarm Systems and Installations:
  - Definitions and Systems
  - Initiating Devices and Notification Systems
  - National Electrical Code and Installation Requirements
  - Start Up and Check Out Procedures
  - National Fire Protection Act, 1972 (NFPA 72)

- Fire Life Safety:
  - National Electrical Code (Relating to Fire Alarms)
  - National Electrical Code Article 725
  - National Electrical Code Article 760
  - NFPA 72
  - Principles of Electronics
- **Industrial Motor Control:**
  - Control Relays and Timers
  - Jogging and Plugging Controls
  - Manual Starters and Magnetic Coils
  - Push Buttons, Selector Switches, and Mechanical Devices
  - Solid State Electronic Devices
  - Variable Frequency Drives

- **Programmable Logic Control (PLC):**
  - Developing Ladder Programming
  - Introduction to Programmable Equipment
  - Programming Programmable Logic Controllers
  - Using Timers and Counters in Logic Programs
  - Writing a Program

- **Electrical Design:**
  - 3 and 4-Way Switching
  - Design of Electrical Circuits
  - Magnetic Motor Control and the Code
  - LonWorks and Building Automation
  - Transformers and the Code

- **Voice, Data and Video:**
  - Audio Distribution
  - CCTV Security Surveillance
  - Computer Networking
  - Fiber Optics
  - Telephonic Interconnect

- **Industry Specific Skills:**
  - Solar Panel Installation
  - Solar Photovoltaics
  - Building Automation Systems
  - Confined Space Entry
  - Specialized Tools
  - Conduit Bending
  - Rigging and Lifting
  - Firestop Installation
  - Blueprints and Schematics
  - Work Flow and Resources
  - Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)
  - Understanding New Technologies and Changes to Industry Standards (Green Training)
  - Proper Equipment Set-Up (Green Training)
  - Safe Working Practices
  - Advanced Instrumentation and Motor Controls
  - Programmable Logic Controllers
• Advanced Welding
• Architecture Designs and Advanced Plan Reading
• Management and Monitoring of Materials
• Testing Materials and Equipment–Proper Set-Up and Use (Green Training)
• Understanding Changes to Industry Standards (Green Training)
• Transformers
• High Voltage Cable Splicing
• Micro-Grid/Energy Storage

• California Advanced Lighting Control Program (CALCP)
  • Advanced Lighting Control Systems
  • Lighting Control Strategies
  • Line Voltage Switching Controls
  • Low Voltage Switching Control
  • Dimming Controls
  • Occupancy Sensors
  • Photosensors

• CALCTP Acceptance Testing
• Electric Vehicle Infrastructure Training Program (EVITP)

BUSINESS SKILLS
• Teambuilding Skills
• Green Awareness Training and Green Certifications
• Leadership Skills
• Customer Service Skills
• Conflict Resolution
• Problem Solving
• Decision Making Skills
• Inventory Checklist
• Advanced Time Management
• Filling Out Work Documents and Reports Accurately
• Project Management
• Creating Project Bids

COMPUTER SKILLS
• Auto Computer-Aided Design (AutoCAD)
• Job Tracking System
• Scheduling & Planning Jobs

0-30

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)
• OSHA 10 (Requires completion of 10 hour course)
• OSHA 30 (Requires completion of 30 hour course)
Class/Lab Hours
8 – 210 (Job Numbers 2 & 3)

Apprentice Training

COMMERCIAL SKILLS

2nd Year
- Orientation, Level II
- Test Instruments, Level I
- Codeology, Level I
- AC Theory, Level I
- Blueprints, Level I
- Electrical Safety-Related Work Practices, Level I
- Transformers, Level I
- Application #5: Conduit Bending
- Application #6: Conduit Bending
- Application #7: Comb. Circuit Wiring
- Application #8: Transformer Connections

3rd Year
- AC Theory
- Blueprints
- Code and Practices
- Electrical Safety-Related Work Practices
- Fire Alarm Systems
- Grounding and Bonding
- Transformers
- Conduit Bending: Rigid & EMT, Chicago & 555
- Lighting Control Panels
- Motor Controls: Relays & Start/Stop
- Cad-welding
- Ground Testing
- Transformer wiring
- CPR/First Aid refresher
- COMET

4th year
- Code Calculations
- Blueprints (& layout yard)
- Grounding and Bonding
- Motors
- Motor Control
- Lightning Protection
- Lighting Essentials
- Motor Controls: mag starter & 3-wire control
- PLC's
- VFD's
- Motor control labs
- Code Prep

5th Year
- Code and Practices
- Code Calculations
- Motor Control
- Orientation
- Rigging
- Torque
- PV/Solar Installer
- CALCTP
- EVITP
- CPR/First Aid Refresher
- Foreman Training: Managing the Work including NECA/IBEW presentations
- Micro-Grid/Energy Storage

0-30

**OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)**
- OSHA 10 (Requires completion of 10 hour course)
- OSHA 30 (Requires completion of 30 hour course)

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

**Note:** Reimbursement for retraining is capped at 200 total training hours per trainee in Job Number 1, and 210 total hours per trainee in Job Numbers 2 & 3, regardless of the method of delivery.
Training Proposal for:
Professionals In Human Resources Association

Agreement Number: ET17-0429

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Rate Retraine</td>
<td>Aerospace and Defense Manufacturing</td>
</tr>
<tr>
<td>SB &lt;100</td>
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</tr>
<tr>
<td>SET</td>
<td>Technology/IT</td>
</tr>
<tr>
<td>HUA</td>
<td>Wholesale Trade</td>
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<table>
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<th>Counties Served:</th>
<th>Repeat Contractor:</th>
</tr>
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<tbody>
<tr>
<td>Statewide</td>
<td>☑ Yes No</td>
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<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Turnover Rate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Yes No</td>
<td>≤20%</td>
</tr>
</tbody>
</table>

| Managers/Supervisors: (% of total trainees) | ≤20% |

FUNDING DETAIL:

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
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<tbody>
<tr>
<td>$887,760</td>
<td>$61,330</td>
<td>$949,090</td>
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8%

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

$920,000
# TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Class / Lab</th>
<th>CBT</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10/30</td>
<td>445</td>
<td>8-200</td>
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<td>$924</td>
<td>$16.16</td>
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<td>Priority Rate</td>
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<td></td>
<td>48</td>
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</tr>
<tr>
<td>2</td>
<td>Retrainee</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10/30</td>
<td>60</td>
<td>8-200</td>
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<td>$641</td>
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<td></td>
<td>40</td>
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<td></td>
</tr>
<tr>
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<td>Retrainee</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10/30</td>
<td>260</td>
<td>8-200</td>
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*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the State or local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.
**Minimum Wage by County:** Job Numbers 1, 2, 3 & 4: $17.63 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara Counties; $16.96 per hour for Los Angeles County; $17.22 per hour for Orange County; $16.72 per hour for San Diego County; $16.46 per hour for Sacramento County; and $16.16 per hour for all other counties.

Job Numbers 5 and 6 (SET-HUA Wage): $13.22 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara Counties; $12.72 per hour for Los Angeles County; $12.92 per hour for Orange County; $12.54 per hour for San Diego County; $12.34 per hour for Sacramento County; and $12.12 per hour 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 health benefits to meet the Post-Retention Wage and will vary by participating employer.

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**INTRODUCTION**

Established in 1944, and headquartered in Gardena, Professionals In Human Resources Association (PIHRA) ([www.pihra.org](http://www.pihra.org)) is a non-profit membership organization dedicated to providing business education, networking and advocacy with an emphasis on the human resources environment. PIHRA has 17 locations throughout California, located in Los Angeles, Orange, Riverside, San Bernardino and Ventura counties. Headquartered in Gardena, PIHRA is the largest affiliate of the Society for Human Resources Management Organization.
PIHRA serves approximately 4,100 members in California. This includes private businesses, non-profit organizations, government agencies and workforce services. [Note: Only private-sector for-profit businesses will participate in this proposal.] PIHRA works with various industries including aerospace, agriculture, automotive, biotechnology, pharmaceutical, construction, warehouse, distribution, education institute, manufacturing, oil and gas refinery, restaurant and food services and technology.

PIHRA provides yearly educational seminars in human resources-related topics for existing and new members, for businesses to stay current on issues relevant to human resource professionals. In addition, PIHRA has indicated that members have expressed a need to be more competitive, enhance job skill sets, and maintain a healthy workforce. The training proposed in this Agreement will assist in accomplishing these objectives.

**PROJECT DETAILS**

PIHRA has experienced a recent increase in membership, with an overwhelming response for training given the success of its current ETP Agreement. PIHRA wishes to continue providing training to meet this demand. PIHRA is focused on providing opportunities to companies that do not have the resources available to provide needed training to their employees.

This will be PIHRA’s second ETP Agreement, designed to begin as soon as training has been completed under the active contract. (See Active Project Table.)

**Training Plan**

Training outlined in this proposal will be customized, based on employer needs assessments and training objectives. PIHRA conducts interviews with employers and training experts to maintain a comprehensive curriculum that is relevant and responsive to training needs. In addition, participating employers are encouraged to complete post-training evaluations. This feedback is used by PIHRA to measure the quality of training and gauge how it meets employer demands.

PIHRA has identified a core group of employers that have made firm commitments to participate. The core group represents 100% of requested funding.

The majority of training (90%) will be conducted at participating employer worksites; the remainder will be center-based. PIHRA confirms that no trainees from previous participating employers will receive duplicate training in any subject matters.

PIHRA provides participating employers with the training in the following areas:

**Business Skills** (30%) – Training will be provided to all occupations to improve communication skills, customer relations and business problem solving.

**Computer Skills** (20%) – Training will be provided to all occupations to learn to effectively use the Company’s internal software applications to design, program, implement and troubleshoot new computer software programs and platforms such as social media, accounting software, and Microsoft Suite.

**Continuous Improvement** (30%) – Training will be provided to all occupations to promote teamwork and improve workflow, troubleshooting, and problem solving. Training includes process mapping, Lean Enterprise topics, and ISO Auditor compliance training.
Management Skills (5%) – Training will provide Managers/Supervisors with leadership and supervisory skills. Training will help staff become effective leaders in high performance workplaces.

Manufacturing Skills (10%) – Training will provide Shipping Staff, Operators, Production Staff, Maintenance Staff, Shop Leads, Technicians, and Small Business Owners with skills pertaining to operate new equipment, blueprint reading, inventory management and aircraft assemblies.

OSHA 10/30 (5%) - OSHA 10/30 is a series of courses “bundled” by industry sector and occupation. OSHA 10 will be provided to Shipping Staff, Operators, Production Staff, Maintenance Staff, Shop Leads, and Technicians. OSHA 30 training will be provided to Managers and Supervisors to ensure a safe work environment.

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 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.

Impact/Outcome

PIHRA anticipates assisting participating employers to prepare for certification programs such as ISO, OSHA 10/30 and Lean Enterprises that are typically awarded based on training and internal improvement. These certifications often lead to new market opportunities, new customers and increased sales, which will ultimately help companies grow, and provide workforce stability.

Commitment to Training

PIHRA represents that ETP funds will not displace the existing financial commitment to training made by the participating employers. Safety training is provided in accordance with all pertinent requirements under state and federal law.

Most of the participating employers lack the resources and funding to conduct formal and structured training, especially small companies. The majority provide on-the-job, one-on-one training to new employees, safety, and off-site seminar training. ETP funding will allow these companies to introduce new business practices and services in order to sustain growth and remain competitive in California. PIHRA will only provide training to participating employers in subjects that are outside of their expertise.

SET/HUA

Under Special Employment Training (SET), a participating employer is not required to demonstrate out-of-state competition and trainees are not required to meet eligibility standards for retraining. This proposal has been identified for SET funding under Job Numbers 5 and 6.

All trainees in Job Numbers 5 and 6 work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. Companies located in Kern, Los Angeles, Riverside, San Bernardino, and Ventura Counties (Bakersfield, Compton, Commerce City, Inglewood, Perris City, Hesperia City, Oak View CDP) qualify for HUA status and thus, qualify for the Standard Minimum Wage instead of the Statewide Average Hourly Wage.
➢ Wage Modification

For trainees in Job Numbers 5 and 6, the Panel may modify the ETP Standard Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. PIHRA is asking for a wage modification to the HUA Minimum Wage ($12.12 to $13.22) for these trainees.

Marketing and Support Costs

PIHRA has established relationships with Society for Human Resource Management and collaborative networks of businesses. PIHRA hosts conventions, meetings, mixers, and uses newsletters, websites, and email communication to promote business opportunities, procurement news, and various networking events. PIHRA has two employees dedicated to marketing, recruiting, assessment, scheduling, and training; therefore, PIHRA seeks full support cost of 8% to fund extensive marketing efforts to recruit additional participating employers and assessment activities of employers. Staff believes 8% support costs are justified in this proposal.

Substantial Contribution

PIHRA serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer has received the benefit of training with payment earned in excess of $250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 30% to reflect a substantial contribution to the cost of training. Funding for any employer that has previously been assessed a substantial contribution will be reduced by 50%. Small businesses are not subject to this provision.

Trainer Qualifications

PIHRA reports that 50% of training will be provided by in-house staff with training vendors, Custom Corporate Communications and Western Training Group. In-house Staff are competent in the subject matter and have completed all classes required for the proficiency in each topic of training prior to delivery of training on that topic (see Training Vendor below). The other half will be delivered in-house by the participating employers.

Training Coordinator

PIHRA has designated two staff member to be responsible for all administrative responsibilities, including recording and tracking training. PIHRA will also utilize a third-party vendor with ETP experience to aid in this endeavor (see Administrative Services below).

Tuition Reimbursement

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by PIHRA under an active ETP Agreement:
Based on ETP Online Systems, 228,800 reimbursable hours have been tracked for potential earnings of $629,434 (84% of approved amount). The Contractor projects final earnings of $748,776 (100% of the approved amount) based on training currently committed to by employers and in progress through June 2017.

**DEVELOPMENT SERVICES**

DLI & Associates LLC in San Juan Capistrano assisted with development at no cost.

**ADMINISTRATIVE SERVICES**

DLI & Associates LLC will also perform administrative services for a fee not to exceed 10% of payment earned.

**TRAINING VENDORS**

Custom Corporate Communications of Redondo Beach and Western Training Group of Playa Del Rey have been retained to provide training in Continuous Improvement, Business and Manufacturing Skills.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Business Writing Skills
- Customer Service
- Communication Skills
- Leadership Skills
- Goal Setting
- Managing Change
- Performance Management Skills
- Problem Solving
- Project Coordination
- Team Building
- Time Management
- Change Management Skills
- Project Management
- Sales Skills

**COMPUTER SKILLS**
- Microsoft Office Suite (Intermediate and advanced)
- QuickBooks and Accounting Software
- Computer Design Software
- E-Commerce
- Enterprise and Manufacturing Management Systems

**CONTINUOUS IMPROVEMENT**
- Lean Enterprise
- Lean Manufacturing
- Lean Office
- Kaizen 7S
- Process Improvement
- Process Mapping
- Problem Solving
- Root Cause Analysis
- Set up Time Reduction
- ISO Auditor Training
- Process Management
- Quality Engineering
- Six Sigma
- Statistical Process Control
- Team Building
**MANAGEMENT SKILLS** (Manager and Supervisor Only)
- Leadership Skills

**MANUFACTURING SKILLS**
- Inventory Management
- Blueprint Reading
- Advanced Measurement Tools and Techniques
- Manufacturing Practices
- Electrical Fundamentals
- Drive Systems Maintenance
- Programmable Logic Controllers

**OSHA 10/30 (Certified OSHA Instructor)**
- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)

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.
## Participating Employers in Retraining Multiple Employer Contracts

### Contractor's Name: Professionals In Human Resources Association
- **CCG No.:** ET17-0429
- **Reference No.:** 17-0166

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<th>Total # of full-time company employees worldwide:</th>
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Training Proposal for:
San Bernardino Community College District
Agreement Number: ET17-0421

Panel Meeting of: February 23, 2017
ETP Regional Office: North Hollywood
Analyst: M. Webb

PROJECT PROFILE

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| Managers/Supervisors: (% of total trainees) | ≤20% |

FUNDING DETAIL

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| In-Kind Contribution: | 50% of Total ETP Funding Required | $474,958 |

ETP 130 - MEC (05/02/16)
## TRAINING PLAN TABLE

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<td></td>
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</tr>
</tbody>
</table>

**Minimum Wage by County:** Job Numbers 1-4: $16.16 per hour for San Bernardino and Riverside counties
Job Number 5 (SET/HUA): $16.16 per hour for San Bernardino and Riverside 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 health benefits to meet the Post-Retention Wage.
Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Numbers 1-5</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturing Staff</td>
<td>698</td>
<td></td>
</tr>
<tr>
<td>Warehouse/Distribution Staff</td>
<td>418</td>
<td></td>
</tr>
<tr>
<td>Administration Staff</td>
<td>233</td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td>188</td>
<td></td>
</tr>
<tr>
<td>Manager/Supervisors</td>
<td>351</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1926, San Bernardino Community College District (SBCCD) ([www sbccd org](http://www.sbccd.org)) is one of 72 college districts in the state of California. SBCCD offers vocational, occupational and workforce training to local area residents and businesses. The service area for the college include the following cities; San Bernardino, Colton, Rialto, Redlands, Yucaipa, Loma Linda, Grand Terrace and Fontana.

Training for adult learners under this proposal will be coordinated and administered through SBCCD’s Economic Development & Corporate Training division (EDCT). EDCT provides training to large and small businesses in the manufacturing, distribution, and transportation industries. This will be SBCCD’s sixth ETP Agreement, the fifth in the past five years.

**Employer Demand**

SBCCD is a member of the Inland Empire Manufacturers’ Consortium (IEMC) whose membership includes over 50 local manufacturing and logistics companies. Many of the participating employers in this Agreement are members of IEMC and have been provided training in the past; however, trainees will not receive duplicate training. Training topics that were included in the last ETP Agreement have been updated to include current trends in software programs and industry processes.

Assessments and surveys completed by employers highlight a strong need to improve mechanical craft, electrical, and welding skills for those in high priority industries. With a shifting economy, employers are searching for alternatives to meet high demand, become a high performing and energy efficient workplace, and increase frontline worker leadership and technology skills.

SBCCD’s menu curriculum has been developed alongside advisory members from the manufacturing consortium and local employers. Collaboration efforts that have taken place will ensure all training topics provided will meet the industry and business needs of the employer. Curriculum topics are geared towards improvement of trainee technical skills, will increase the number of staff workers with certifications, and provide employers with the capabilities and skill sets to compete in the global market.

**PROJECT DETAILS**

To meet local business needs, SBCCD has narrowed their curriculum topics to the following areas listed below (Training Plan). These training topics are known to improve employee skill sets and
enhance the worker’s ability to problem solve and develop resolutions to employer production processes.

**Training Plan**

**Business Skills (25%)**: Training will be offered to Manufacturing, Maintenance, Warehouse/Distribution and Administrative Staff. Training will improve staff ability to improve customer service skills, generate business and financial reports, and improve written and verbal communication skills.

**Literacy Skills (1%)**: Training will be offered to Manufacturing, Warehouse/Distribution and Administrative Staff to improve overall job performance and communication in the workplace. Trainees will receive instruction in basic math and VESL training to improve communication among co-workers and supervisors.

**Commercial Skills (1%)** Training will be offered to Maintenance Staff to implement and learn new green technologies such as photovoltaic applications to meet energy efficiency business needs.

**OSHA 10/30 (3%)**: Training will be offered to Manufacturing, Maintenance and Warehouse/Distribution Staff. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training. 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.

**Computer Skills (20%)**: Training will be offered to all occupations to improve computer literacy and increase usage of computer software programs utilized by the Employer.

**Manufacturing Skills (30%)**: Training will be offered to Manufacturing, Maintenance and Warehouse/Distribution Staff and Managers/Supervisors. Workers will learn new skills to improve productivity and product quality, as well as reduce waste being accumulated in the manufacturing process. Training delivered will help frontline workers identify and resolve production problems and improve production processes.

**Continuous Improvement (20%)**: Training will be offered to all occupations to improve employee skill sets. Training provided will ensure the company can reach production goals, increase efficiency, and develop new teamwork strategies.

**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 ($29.38) at the end of the retention period. Trainees must also be “frontline workers” to be eligible for SET funding.

Trainees in Job Number 5 work in a High Unemployment Area (HUA, with unemployment exceeding the state average by 25%). Employer locations in San Bernardino and Riverside counties qualify for HUA status, as a result, the ETP Minimum Wage for companies in these counties is $16.16 per hour. SBCCD is requesting the HUA Modification.

- Frontline Manager/Supervisor

SBCCD had included Managers/Supervisors in Job Number 5. These employees supervise and work with Manufacturing, Maintenance, and Warehouse/Distribution Staff. These trainees are eligible for SET funding because they spend more than 50% of their time performing frontline duties. This meets the Panel’s definition of frontline workers.
Marketing and Support Costs

EDCT provides economic and workforce training to local area employers and has been a member of the IEMC for over 10 years. The College has received commitments from these employers to participate in training under this Agreement. SBCCD will continue to market and recruit additional trainees as needed utilizing all recruitment avenues that include trade associations, the San Bernardino Workforce Investment Board, and mailings from the college’s distribution list.

SBCCD is requesting 8% support costs for this proposal to cover the cost of recruiting additional employers and assessing employer-specific job training requirements. Assessment activities and employer recruitment will continue to take place throughout the duration of the contract. Staff recommends approval of 8% for support costs.

Commitment to Training

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

Training provided through this Agreement will not circumvent any existing training ordinarily provided to staff by the participating employer. Employers will continue to deliver state mandated and on-the-job training alongside ETP-funded training.

Training Infrastructure

This project will be administered in-house by the EDCT division staff. EDCT has coordinated and implemented ETP Agreements for over 12 years. Three full-time and two part-time staff members will be responsible for marketing, recruitment, needs assessments, data entry, scheduling of training and ETP recordkeeping.

Trainer Qualifications

Trainers employed by SBCCD are qualified instructors with the education and experience to train in the topics delivered (Manufacturing Skills, Continuous Improvement, Computer Skills, etc.).

Impact/Outcome

Trainees who compete SBCCD’s welding program will receive American Welding Society certification and those in the Mechanical Craft Applications course will receive eligibility for the National Center for Construction Education and Research certification. Other certifications include ISO for Continuous Improvement Occupational Safety and Hazard (OSHA) and Professional in Human Resources.

Tuition Reimbursement

In accordance with Title 22, CCR, Section 4412.1, SBCCD 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.

RECOMMENDATION

Staff recommends approval of this proposal.
ACTIVE PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0111</td>
<td>$949,960</td>
<td>08/01/15-07/31/17</td>
<td>1,356</td>
<td>1,356</td>
<td>1,150</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 44,170 reimbursable hours have been tracked for potential earnings of $856,352 (90% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through February 2017. Approximately 1,150 trainees have completed the 90-day retention period and will be billed for final payment prior to the End of Term.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0214</td>
<td>San Bernardino</td>
<td>08/04/14-09/03/15</td>
<td>$374,614</td>
<td>$347,387 (93%)</td>
</tr>
<tr>
<td>ET13-0180</td>
<td>San Bernardino</td>
<td>10/22/12-10/21/14</td>
<td>$699,896</td>
<td>$699,869 (100%)</td>
</tr>
<tr>
<td>ET11-0245</td>
<td>San Bernardino</td>
<td>05/02/11-05/01/13</td>
<td>$399,432</td>
<td>$370,356 (93%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

Developing Leaders, Inc. of Fontana will provide Continuous Improvement Skills training for a fee of $90 per hour. Envision Education, LLC of Rancho Cucamonga will provide Business Skills training for a fee of $75 per hour. 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**
- Accountability
- Budgeting, Cost Control and Accounting
- Business Reports
- Business Strategies
- Change Management
- Communication Skills
- Conflict Management
- Costs and Analysis
- Customer Service
- Financial Strategies
- Goal Setting
- Interpersonal Skills
- Interviewing
- Leadership Skills
- Negotiation
- Performance Management
- Presentation Skills
- Professional in Human Resources Preparation Course
- Project Management
- Sales & Marketing
- Scheduling and Planning
- Standard Office Procedures
- Strategic Planning
- Supervisory Skills
- Time Management
- Understanding Work Group Dynamics

**COMMERCIAL SKILLS**
- Heating, Ventilation, & Air Condition
- Photovoltaic and Solar Panel Applications

**COMPUTER SKILLS**
- Computer Networking
- Computer-Aided Drafting & CAM
- Cost Tracking and Analysis
- Database Mgmt.
- Document Control
- Intermediate & Advanced Microsoft Office
- Inventory Control
- Managing Email
- Purchase Order Tracking
- Shipping Solutions and Related Logistic Software
- Software Applications
- Solid Works Modeling
- World-Wide Web

**CONTINUOUS IMPROVEMENT**
- 6 Sigma
- Basic Logistics Standard Practices
- Certified Logistics Manager
- Coaching and Mentoring
- Decision Making
- Inventory Control
- ISO & AS Standards
- Just-in-Time Manufacturing
- Lean/5-S
- Managing a High Performance Workplace
- Manufacturing Resource Planning
- Material Resource Planning
- Problem Solving
- Process Improvement
- Root Cause Analysis
- Strategic Process Control
- Supply Chain Elements & Management
- Teambuilding
- Total Quality Management
- Tracking and Monitoring Production
- Workflow & Scheduling

**OSHA 10/30** (Certified OSHA Instructor)
- OSHA 10 (requires 10hr completion)
- OSHA 30 (requires 30hr completion)

**MANUFACTURING SKILLS**
- Advanced Mechanical Crafts
- Blue Print & Schematic Drawings
- Computer Numerical Controlled Machinery
- Electrical Skills
- Equipment Maintenance and Repair
- Equipment Operation
- Forklift Training
- Intermediate Mechanical Crafts
- Lubrication/Reliability
- Manufacturing Practices
- Manufacturing Skills
- Nanotechnology Technician’s Training
- Parts and Products Manufacturing
- Programmable Logic Controller
- Production & Machinery
- Production Operations
- Production Operations
- Shop Math
• Warehousing
• Welding Skills

**LITERACY SKILLS**
• Language Comprehension
• Vocational English as a Second Language
• Writing & Reading

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

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.
<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s)</th>
<th>Estimated # of employees to be retrained under this Agreement</th>
<th>Total # of full-time company employees worldwide</th>
<th>Total # of full-time company employees in California</th>
</tr>
</thead>
<tbody>
<tr>
<td>3M Corporation</td>
<td>8981 U.S. Hwy. 395</td>
<td>Oak Hills, CA 92344</td>
<td>N/A</td>
<td>120</td>
<td>90,000</td>
<td>10,000</td>
</tr>
<tr>
<td>Ardent Mills, LLC</td>
<td>19684 Cajon Blvd.</td>
<td>San Bernardino, CA 92407</td>
<td>N/A</td>
<td>19</td>
<td>2,000</td>
<td>105</td>
</tr>
<tr>
<td>California Steel Industries</td>
<td>1 California Steel Way</td>
<td>Fontana, CA 92335</td>
<td>N/A</td>
<td>100</td>
<td>900</td>
<td>900</td>
</tr>
<tr>
<td>Clover Needlecraft, Inc.</td>
<td>1441 S. Carlos Ave.</td>
<td>Ontario, CA 91761</td>
<td>N/A</td>
<td>21</td>
<td>22</td>
<td>21</td>
</tr>
<tr>
<td>Company</td>
<td>Address</td>
<td>City, State, Zip</td>
<td>Collective Bargaining Agreement(s):</td>
<td>Estimated # of employees to be retrained under this Agreement:</td>
<td>Total # of full-time company employees worldwide:</td>
<td>Total # of full-time company employees in California:</td>
</tr>
<tr>
<td>-------------------------</td>
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<td>---------------------------</td>
<td>-------------------------------------</td>
<td>---------------------------------------------------------------</td>
<td>--------------------------------------------------</td>
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</tr>
<tr>
<td>Converse Inc.</td>
<td>4459 E. Lowell Street</td>
<td>Ontario, CA 91764</td>
<td>N/A</td>
<td>50</td>
<td>1,500</td>
<td>500</td>
</tr>
<tr>
<td>Corona Clipper Inc.</td>
<td>22440 Temescal Canyon Rd.</td>
<td>Corona, CA 92883</td>
<td>N/A</td>
<td>55</td>
<td>55</td>
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</tr>
<tr>
<td>Cott Beverage, USA</td>
<td>631 South Waterman Ave.</td>
<td>San Bernardino, CA 92408</td>
<td>N/A</td>
<td>75</td>
<td>145</td>
<td>145</td>
</tr>
<tr>
<td>D &amp; W Fine Pack</td>
<td>4162 Georgia Blvd.</td>
<td>San Bernardino, CA 92407</td>
<td>N/A</td>
<td>120</td>
<td>1,500</td>
<td>120</td>
</tr>
</tbody>
</table>
## Participating Employers in Retrainee Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor’s Name: San Bernardino Community College District</th>
<th>CCG No.: ET17-0421</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No: 17-0103</td>
<td>Page: 3 of 8</td>
</tr>
</tbody>
</table>

### Dalton Trucking Inc.
- **Address:** 13560 Whittram Ave.
- **City, State, Zip:** Fontana, CA 92335
- **Collective Bargaining Agreement(s):** N/A
- **Estimated # of employees to be retrained under this Agreement:** 10
- **Total # of full-time company employees worldwide:** 200
- **Total # of full-time company employees in California:** 200

### DHL Regional Maintenance
- **Address:** 9211 Kaiser Way
- **City, State, Zip:** Fontana, CA 92335
- **Collective Bargaining Agreement(s):** N/A
- **Estimated # of employees to be retrained under this Agreement:** 2
- **Total # of full-time company employees worldwide:** 200,000
- **Total # of full-time company employees in California:** 7,000

### Dorel Industries
- **Address:** 9950 Calabash Ave.
- **City, State, Zip:** Fontana, CA 92335
- **Collective Bargaining Agreement(s):** N/A
- **Estimated # of employees to be retrained under this Agreement:** 33
- **Total # of full-time company employees worldwide:** 4,500
- **Total # of full-time company employees in California:** 78

### FTDI West Inc.
- **Address:** 3375 Enterprise Drive
- **City, State, Zip:** Bloomington, CA 92316
- **Collective Bargaining Agreement(s):** N/A
- **Estimated # of employees to be retrained under this Agreement:** 12
- **Total # of full-time company employees worldwide:** 100
- **Total # of full-time company employees in California:** 80

ETP 100B (1/09)
<table>
<thead>
<tr>
<th>Contractor’s Name</th>
<th>San Bernardino Community College District</th>
<th>CCG No.: ET17-0421</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No:</td>
<td>17-0103</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Company: GEODIS</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Address: 13277 San Bernardino Ave.</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>City, State, Zip: Fontana, CA 92335</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s):</td>
<td>N/A</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Estimated # of employees to be retrained under this Agreement:</td>
<td>325</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Total # of full-time company employees worldwide:</td>
<td>10,000</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Total # of full-time company employees in California:</td>
<td>770</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Company: Gerard Daniel Worldwide</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Address: 13055 Jurupa Ave.</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>City, State, Zip: Fontana, CA 92337</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s):</td>
<td>N/A</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Estimated # of employees to be retrained under this Agreement:</td>
<td>44</td>
<td>Page: 4 of 8</td>
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<td>Total # of full-time company employees worldwide:</td>
<td>350</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Total # of full-time company employees in California:</td>
<td>80</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Company: Horizon Hobby LLC</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Address: 4710 E. Guasti Rd.</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>City, State, Zip: Ontario, CA 91761</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s):</td>
<td>N/A</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Estimated # of employees to be retrained under this Agreement:</td>
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</tr>
<tr>
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<td>70</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Total # of full-time company employees in California:</td>
<td>15</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Company: iHerb.com</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Address: 17825 Indian St.</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>City, State, Zip: Moreno Valley, CA 92551</td>
<td></td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s):</td>
<td>N/A</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Estimated # of employees to be retrained under this Agreement:</td>
<td>280</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Total # of full-time company employees worldwide:</td>
<td>600</td>
<td>Page: 4 of 8</td>
</tr>
<tr>
<td>Total # of full-time company employees in California:</td>
<td>280</td>
<td>Page: 4 of 8</td>
</tr>
</tbody>
</table>
### Participating Employers in Retraining

**Multiple Employer Contracts**

<table>
<thead>
<tr>
<th>Contractor’s Name</th>
<th>CCG No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Bernardino Community College District</td>
<td>ET17-0421</td>
</tr>
</tbody>
</table>

| Reference No: 17-0103 | Page: 5 of 8 |

<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s):</th>
<th>Estimated # of employees to be retrained under this Agreement:</th>
<th>Total # of full-time company employees worldwide:</th>
<th>Total # of full-time company employees in California:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innocor Inc.</td>
<td>310 S. Tippecanoe Ave.</td>
<td>San Bernardino, CA 92408</td>
<td>N/A</td>
<td>21</td>
<td>1,700</td>
<td>21</td>
</tr>
<tr>
<td>Louis Vuitton US Manufacturing, Inc.</td>
<td>321 W. Covina Blvd.</td>
<td>San Dimas, CA 91773</td>
<td>N/A</td>
<td>40</td>
<td>530</td>
<td>530</td>
</tr>
<tr>
<td>Mapei Corporation</td>
<td>5415 Industrial Pkwy.</td>
<td>San Bernardino, CA 92407</td>
<td>N/A</td>
<td>6</td>
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<td>67</td>
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<tr>
<td>McLane Company Inc.</td>
<td>4472 Georgia Blvd.</td>
<td>San Bernardino, CA 92407</td>
<td>N/A</td>
<td>184</td>
<td>22,000</td>
<td>2,000</td>
</tr>
<tr>
<td>Company</td>
<td>Address</td>
<td>City, State, Zip</td>
<td>Collective Bargaining Agreement(s)</td>
<td>Estimated # of employees to be retrained under this Agreement</td>
<td>Total # of full-time company employees worldwide</td>
<td>Total # of full-time company employees in California</td>
</tr>
<tr>
<td>---------------------------------</td>
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<td>------------------------</td>
<td>-----------------------------------</td>
<td>----------------------------------------------------------------</td>
<td>-------------------------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>Mitsubishi Cement Corporation</td>
<td>5808 State Highway 18</td>
<td>Lucerne Valley, CA 92356</td>
<td>N/A</td>
<td>14</td>
<td>1,000</td>
<td>140</td>
</tr>
<tr>
<td>National Distribution Center</td>
<td>6725 Kimball Ave.</td>
<td>Chino, CA 91764</td>
<td>N/A</td>
<td>105</td>
<td>8,000</td>
<td>8,000</td>
</tr>
<tr>
<td>NGL Warehouse, LLC</td>
<td>14780 Bar Harbor Rd., Ste. B</td>
<td>Fontana, CA 92336</td>
<td>N/A</td>
<td>15</td>
<td>900</td>
<td>100</td>
</tr>
<tr>
<td>ODW Logistics Inc.</td>
<td>1000 S. Etiwanda Ave.</td>
<td>Ontario, CA 91761</td>
<td>N/A</td>
<td>174</td>
<td>800</td>
<td>200</td>
</tr>
<tr>
<td>Company</td>
<td>Address</td>
<td>City, State, Zip</td>
<td>Collective Bargaining Agreement(s)</td>
<td>Estimated # of employees to be retrained under this Agreement</td>
<td>Total # of full-time company employees worldwide</td>
<td>Total # of full-time company employees in California</td>
</tr>
<tr>
<td>-------------------------</td>
<td>--------------------------------</td>
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<td>---------------------------------------------------------------</td>
<td>------------------------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>P &amp; R Paper Supply Co.</td>
<td>1898 E. Colton Ave.</td>
<td>Redlands, CA 91737</td>
<td>N/A</td>
<td>12</td>
<td>238</td>
<td>223</td>
</tr>
<tr>
<td>Payless</td>
<td>26881 Palmetto Ave.</td>
<td>Redlands, CA 92374</td>
<td>N/A</td>
<td>16</td>
<td>26,000</td>
<td>205</td>
</tr>
<tr>
<td>Phenix Technology</td>
<td>12391 Sampson St., Suite H</td>
<td>Riverside, CA 92305</td>
<td>N/A</td>
<td>8</td>
<td>12</td>
<td>12</td>
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<tr>
<td>Renovis Surgical</td>
<td>1901 West Lugonia Ave., Ste. 340</td>
<td>Redlands, CA 92374</td>
<td>N/A</td>
<td>10</td>
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<td>18</td>
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</table>
## Participating Employers in Retrainee Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor's Name: San Bernardino Community College District</th>
<th>CCG No.: ET17-0421</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No: 17-0103</td>
<td>Page: 8 of 8</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company: Weber Logistics</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Address: 9345 Santa Anita Ave.</td>
<td></td>
</tr>
<tr>
<td>City, State, Zip: Rancho Cucamonga, CA 91730</td>
<td></td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s): N/A</td>
<td></td>
</tr>
<tr>
<td>Estimated # of employees to be retrained under this Agreement: 100</td>
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<tr>
<td>Total # of full-time company employees worldwide: 350</td>
<td></td>
</tr>
<tr>
<td>Total # of full-time company employees in California: 350</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company: Winpak Lane Inc.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Address: 998 S. Sierra Way</td>
<td></td>
</tr>
<tr>
<td>City, State, Zip: San Bernardino, CA 92408</td>
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<td>Collective Bargaining Agreement(s): N/A</td>
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<td>Total # of full-time company employees in California: 94</td>
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</table>
Training Proposal for:

Studio Arts, Ltd.

Agreement Number: ET17-0405

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood  Analyst: E. Wadzinski

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
<th>SB &lt;100</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Industry Sector(s):</th>
<th>Multimedia/Entertainment</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Priority Industry:</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Los Angeles</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Repeat Contractor:</th>
<th>Yes</th>
<th>No</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

- Motion Picture Editors Guild IATSE Local 700
- Make-Up Artists and Hair Stylists Guild IATSE Local 706
- Studio Transportation Drivers Local 399
- The Animation Guild IATSE Local 839
- Script Supervisors/Continuity, Coordinators, Accounts & Allied Production Specialists Guild Local 871

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>≤20%</th>
</tr>
</thead>
</table>

| Managers/Supervisors: (% of total trainees) | 0% |

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>$841,776</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Support Costs</th>
<th>$57,936</th>
</tr>
</thead>
</table>

8%

Total ETP Funding: $899,712

In-Kind Contribution: 50% of Total ETP Funding Required: $836,628
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate</td>
<td>Advanced Technology</td>
<td>500</td>
<td>8-240</td>
<td>$1,056</td>
<td>$16.96</td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Priority Rate SB&lt;100</td>
<td>Advanced Technology</td>
<td>352</td>
<td>8-240</td>
<td>$1,056</td>
<td>$16.96</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $16.96 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

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

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Animator 1</td>
<td>75</td>
<td></td>
</tr>
<tr>
<td>Animator 2</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Art Director 1</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Art Director 2</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Artist 1</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Artist 2</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Compositor 1</td>
<td>75</td>
<td></td>
</tr>
<tr>
<td>Compositor 2</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Construction Coordinator 1</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Construction Coordinator 2</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Costume Designer 1</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Costume Designer 2</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Editor 1</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Editor 2</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Hair Stylist 1</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Hair Stylist 2</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Illustrator/Storyboard 1</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Illustrator/Storyboard 2</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Lighting Tech 1</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Lighting Tech 2</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Makeup Artist 1</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Makeup Artist 2</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 2001, Studio Arts, Ltd. (Studio Arts) (www.studioarts.com) is a private training company for high-tech, computer-based software and hardware for the motion picture, television and post-production industries located in Los Angeles. The school serves motion picture and television production, visual effects, game, production design, mobile entertainment, educational entertainment and online gaming, set design, prop-making, and model-making companies in Southern California. This is Studio Arts sixth ETP proposal.

PROJECT DETAILS

The entertainment industry is fluid, dynamic, and laden with frequent technological changes that happen very quickly and very dramatically. Today, big studios no longer dominate. Most productions are being done by companies that are much more compact and flexible. These companies include HBO, Showtime, Netflix, Amazon, Hulu, and Google to name a few. Many of these companies are web-based, using the internet and associated mobile media delivery systems to provide consumer content. Many shows are now more elaborate with multiple scenes and storylines for subsequent “franchise” releases all being shot at the same time in parallel fashion. Due to advances in digital technology, production and post-production work can be completed and transmitted digitally. Turnaround times for production-to-exhibition are now much shorter, with production values remaining the same. Most productions now have shorter
production times and are often developed, shot and assembled at multiple locations, many out-of-state.

Additionally, there have been changes to release protocols of theatrical films. These are no longer automatically released in theaters. Many are broadcasted on cable or streamed directly to consumers. Cable now dominates as a major distribution network. It will not be long until cable is overtaken by the internet which has become gigantic in scope.

Video games, are also becoming more cinematic and complex as has “Virtual Reality” technology (also referred to as immersive media). These new technologies are becoming an increasingly important source of entertainment bringing new standards and complexities to production.

Training Plan

Competition for production is fierce. Out-of-state companies are aggressively competing with California’s local industry which is challenged to compete. California’s production community necessitates the adaptation, implementation and rapid deployment of a highly trained workforce. Training will prepare and deploy the most highly-skilled and technically savvy entertainment workforce available anywhere in the world.

Advanced Technology

Advanced Technology training will be delivered to all occupations. Studio Arts will train workers in various aspects of animation, computer graphics, digital television, feature film production, visual effects and post-production focusing specifically on digital art and technology as it relates to character design and animation, set design and construction, motion capture, green/blue screen technology, digital storyboarding, lighting, graphics, and special effects. Training will equip workers with the most marketable skills available in a highly competitive and technically sophisticated industry.

This training program is designed for highly skilled occupations that typically require a Bachelor of Arts or Bachelor of Science degree or higher (e.g. in Animation, Art, Architecture, Computer Science, Computer Programming, Interior Design, Production Design) plus commensurate industry experience. The work requires a great deal of skill and accuracy with an expansive understanding of art and computers.

About 80% of the training will be delivered at the Studio Arts facility in Los Angeles and the other 20% at employer worksites. Center-based training will be delivered by industry experts in classrooms equipped with state-of-the-art; production-ready equipment and software intended to provide skills for professional, production-ready work. The equipment and software are expensive to purchase, operate, and maintain. A typical computer outfitted with the software costs in excess of $6,000, and the trainers’ pay rate often exceeds $100 per hour. The highly technical material necessitates small classes of no more than 10 students per trainer, which also drives the cost. Studio Arts’ normal published rates are $50 per training hour.

Commitment to Training

Core participating employers have stated that they occasionally provide employer orientation and some basic training on their own, but lack the necessary operational overhead, space, equipment, software, and expert instructors to effectively train their workers.

Employers have shown their ongoing commitment to training by contributing staff time to organize training, providing on-the-job reinforcement, providing technical upgrades, and
allowing some trainees to take classes during work time. Studio Arts continually endeavors to have employers increase their own financial commitment to continued training efforts.

**Training Agency Certification**

Studio Arts is eligible as a training agency licensed by the Bureau for Private Postsecondary Education.

**Marketing and Support Costs**

Studio Arts markets its training to employers via informational meetings and seminars, conferences, trade magazine advertising, posters, and mailing brochures, as well as the internet and e-mail. The Company may also advertise through Workforce Investment Boards, human resources departments and staff.

There are currently five dedicated staff members who conduct employer marketing, recruitment, assessment, and provide project administration and tracking. Studio Arts is requesting 8% support for employer recruitment and needs assessments activities that will be ongoing throughout the term of the contract. Studio Arts recruits from a very large labor market. Due to rapid technological changes, they must spend a significant amount of time matching employer needs to the curriculum. Thus, staff recommends support costs.

**Curriculum Development**

The curriculum has been designed to meet rigorous industry and employer-specific needs for production companies, guilds, and unions of the motion picture, television, and post-production industries. Studio Arts holds trade advisory meetings attended by visiting company representatives and industry experts who help develop curriculum to address immediate, short- and long-term needs. Email surveys, interviews, and consultations are held with production management and potential trainees to determine course content.

Studio Arts routinely employs assessment forms completed by students at the end of every class, and maintains close relationships with employers, unions, and trade organizations to ensure that training is relevant and effective.

**Union Support**

Included in the core group of employers are trainees represented by a total of five collective bargaining units. ETP has received letters of support from all collective bargaining units (See Page 1).

**Training Hours Limitation**

Studio Arts is requesting a waiver to exceed the standard cap of 200 hours of training to allow up to 240 hours of training for a small number of trainees. Since 2007, Studio Arts offers a Skills Mastery Program to unemployed individuals seeking entertainment-industry careers participating in the WIA program as approved by I-Train. The curriculum consists of eight, 30-hour courses from the school’s standard curriculum, and provides technical skills training in various software.

The Mastery Certificate of Completion is issued after completion of 240-hours of courses (versus single classes) in recognized skills sets such as 2D Digital Animation, Compositing and Visual Effects, and Digital Set Design. Certification will give trainees competence in specific
core skills for software, hardware or application (e.g. Certificate of Completion for Digital Set Design – competency in AutoCAD, Vectorworks, Rhino and SketchUp Pro). Studio Arts expects only 2-3% (approximately 20 trainees) to participate in this training.

Retention

Retention is at least 90 consecutive days full-time with one employer. Full-time employment means 35 hours per week. Retention can also be 500 hours in 272 days with one or more employers, in keeping with the Panel’s regulatory standards for motion pictures production workers. Studio Arts is requesting this modification.

Tuition Reimbursement

Students enrolled in ETP-funded training 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, including the training hour modification and the alternative retention.

ACTIVE PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0151</td>
<td>$899,608</td>
<td>08/29/2015–08/28/2017</td>
<td>784</td>
<td>667</td>
<td>316</td>
</tr>
</tbody>
</table>

Based on hours tracked in ETP systems, the Contractor has provided 27,671 hours to trainees who have completed the minimum number of training hours required by ETP, sufficient training hours for potential earnings of $769,254 (86% of approved amount). The Contractor anticipates exhausting all ETP training funds by the end of February 2017. Due to the alternate retention of 500 hours within 272 days as permitted for the entertainment industry, most retention will be completed towards the end of the contract. Many trainees work for production companies with hiatus periods or down time in between productions requiring the alternate retention period.

PRIOR PROJECTS

The following table summarizes performances by Studio Arts under ETP Agreements that were completed within the last five years:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
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</thead>
<tbody>
<tr>
<td>ET15-0248</td>
<td>Los Angeles</td>
<td>08/24/2014–08/23/2016</td>
<td>$749,749</td>
<td>$741,050 (99%)</td>
</tr>
<tr>
<td>ET13-0359</td>
<td>Los Angeles</td>
<td>04/27/2013–04/26/2015</td>
<td>$749,705</td>
<td>$731,223 (98%)</td>
</tr>
<tr>
<td>ET12-0290</td>
<td>Los Angeles</td>
<td>01/27/2012–01/26/2014</td>
<td>$499,499</td>
<td>$483,116 (97%)</td>
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<tr>
<td>ET11-0108</td>
<td>Los Angeles</td>
<td>12/31/2010–12/30/2012</td>
<td>$249,302</td>
<td>$249,302 (100%)</td>
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</table>
DEVELOPMENT SERVICES
N/A

ADMINISTRATIVE SERVICES
N/A

TRAINING VENDORS
To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours
8-240

Trainees may receive any of the following:

ADVANCED TECHNOLOGY

- 2D Digital Animation
- 3D Storyboarding and Rough Layout
- Adobe Lightroom
- After Effects
- Avid
- AutoCAD
- CG Animation
- Character Design
- Cinema 4D
- Comic Book Illustration
- Composting
- Concept Design
- Corel Painter
- Costume Plot Pro
- Creature Design
- Demo Reels
- Digital Design and Illustration
- Digital Drafting
- Digital Storyboarding
- Entertainment Design
- Environmental Design
- Fusion
- Final Cut
- Filemaker Pro
- FX
- Game Design
- Graphic Design and Illustration
- Houdini
- InDesign
- Lighting, Dynamics and VFX
- MARI
- Mac OS
- Maya
- Mobile Gaming
- Modeling
- Modo
- Motion Capture
- Motion Graphics
- Motion Tracking
- NUKE
- Roto & Tracking with MOCHA
- Painting and Textures
- Photoshop for Art and Costume Designs
• Production Design
• Rapid Prototyping
• Red Camera
• Renderman
• Revit
• Rhino
• Rigging
• Scripting (Unity, Python, Unreal)
• SketchUp Pro
• Solidworks
• Special Effects Makeup
• Textures
• Toon Boom
• Vectorworks
• Visual Effects
• ZBrush

Note: Reimbursement for retraining is capped at 240 total training hours regardless of the method of delivery.
### Participating Employers in Retrainees

#### Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s)</th>
<th>Estimated # of employees to be retrained under this Agreement</th>
<th>Total # of full-time company employees worldwide</th>
<th>Total # of full-time company employees in California</th>
</tr>
</thead>
<tbody>
<tr>
<td>48 Communications</td>
<td>8648 Holloway Plaza Dr.</td>
<td>Los Angeles, CA 90069</td>
<td>No</td>
<td>3</td>
<td>7</td>
<td>4</td>
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<tr>
<td>6 Point Harness</td>
<td>1759 Glendale Blvd.</td>
<td>Los Angeles, CA 90026</td>
<td>No</td>
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<td>35</td>
<td>35</td>
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<tr>
<td>Age of Learning</td>
<td>101 N. Brand Blvd., 8th Floor</td>
<td>Glendale, CA 91203</td>
<td>No</td>
<td>75</td>
<td>534</td>
<td>530</td>
</tr>
<tr>
<td>AFX Studio/Magnum Opus</td>
<td>14734 Arminta St.</td>
<td>Los Angeles, CA 90034</td>
<td>No</td>
<td>2</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Contractor's Name:</td>
<td>Alterian Inc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address:</td>
<td>15709 E. Arrow Hwy., Suite 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City, State, Zip:</td>
<td>Irwindale, CA 91706</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s):</td>
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<tr>
<td>Total # of full-time company employees in California:</td>
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<table>
<thead>
<tr>
<th>Contractor's Name:</th>
<th>Artifact Studios</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>430 W. Acacia Ave.</td>
</tr>
<tr>
<td>City, State, Zip:</td>
<td>Glendale, CA 91204</td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s):</td>
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<td>Estimated # of employees to be retrained under this Agreement:</td>
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<td>Total # of full-time company employees worldwide:</td>
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</tr>
<tr>
<td>Total # of full-time company employees in California:</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contractor's Name:</th>
<th>AV Squad</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>7750 W. Sunset Blvd.</td>
</tr>
<tr>
<td>City, State, Zip:</td>
<td>Los Angeles, CA 90046</td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s):</td>
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</tr>
<tr>
<td>Estimated # of employees to be retrained under this Agreement:</td>
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</tr>
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<td>Total # of full-time company employees worldwide:</td>
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<tr>
<td>Total # of full-time company employees in California:</td>
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</table>

<table>
<thead>
<tr>
<th>Contractor's Name:</th>
<th>Ayzenberg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>49 E. Walnut</td>
</tr>
<tr>
<td>City, State, Zip:</td>
<td>Pasadena, CA 91103</td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s):</td>
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</tr>
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<td>Estimated # of employees to be retrained under this Agreement:</td>
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<td>150</td>
</tr>
<tr>
<td>Total # of full-time company employees in California:</td>
<td>150</td>
</tr>
<tr>
<td>Contractor’s Name</td>
<td>Address</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------------------------------------------</td>
</tr>
<tr>
<td>Studio Arts, Ltd.</td>
<td>5161 Lankershim Blvd., Suite 120</td>
</tr>
<tr>
<td>Bento Box</td>
<td>5161 Lankershim Blvd., Suite 120</td>
</tr>
<tr>
<td>Blue Collar Productions</td>
<td>1041 N. Formosa Ave., SME</td>
</tr>
<tr>
<td>&quot;Bosch&quot; - Holdfast Productions/Amazon</td>
<td>846 N. Cahuenga</td>
</tr>
<tr>
<td>Cartoon Network</td>
<td>300 N. 3rd Street</td>
</tr>
<tr>
<td>Company</td>
<td>Address</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Circus Dog Productions/Pietown</td>
<td>5433 Laurel Canyon Blvd., 2nd Floor</td>
</tr>
<tr>
<td>Concept Arts</td>
<td>6422 Selma Ave.</td>
</tr>
<tr>
<td>Concept Design Productions</td>
<td>5367 Irwindale Ave.</td>
</tr>
<tr>
<td>Create Advertising Group</td>
<td>6022 Washington Blvd.</td>
</tr>
<tr>
<td>Contractor's Name:</td>
<td>Company: Creature Effects Inc.</td>
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<tr>
<td>-------------------</td>
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</tr>
<tr>
<td>Address:</td>
<td>Address: 3329 Cahuenga Blvd. West</td>
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<tr>
<td>City, State, Zip:</td>
<td>City, State, Zip: Los Angeles, CA 90068</td>
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<tr>
<td>Collective Bargaining Agreement(s):</td>
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<td>Total # of full-time company employees worldwide:</td>
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<table>
<thead>
<tr>
<th>Company: Dahlhouse Scenery</th>
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<tbody>
<tr>
<td>Address: 159 S. Anderson Street</td>
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<tr>
<td>City, State, Zip: Los Angeles, CA 90033</td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s): IATSE Local 839</td>
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<td>Estimated # of employees to be retrained under this Agreement:</td>
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<td>Total # of full-time company employees in California:</td>
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<table>
<thead>
<tr>
<th>Company: Daniels Engraving Co.</th>
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</thead>
<tbody>
<tr>
<td>Address: 571 5th Street</td>
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<td>City, State, Zip: San Fernando, CA 91340</td>
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<td>Estimated # of employees to be retrained under this Agreement:</td>
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<td>Total # of full-time company employees worldwide:</td>
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<td>Total # of full-time company employees in California:</td>
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<table>
<thead>
<tr>
<th>Company: Discovery Communications</th>
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</thead>
<tbody>
<tr>
<td>Address: 21220 Erwin St.</td>
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<tr>
<td>City, State, Zip: Woodland Hills, CA 91367</td>
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<td>Collective Bargaining Agreement(s): No</td>
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<tr>
<td>Total # of full-time company employees in California:</td>
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</table>
## Participating Employers in Retrainee Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor’s Name</th>
<th>CCG No.: ET17-0405</th>
</tr>
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<tbody>
<tr>
<td><strong>Company:</strong> Film Illusions</td>
<td><strong>Reference No:</strong> 17-0160</td>
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<tr>
<td>Address: 7410 San Fernando Road</td>
<td><strong>Total # of full-time company employees worldwide:</strong> 10</td>
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<tr>
<td>City, State, Zip: Sun Valley, CA 91352</td>
<td><strong>Total # of full-time company employees in California:</strong> 10</td>
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<tr>
<td>Collective Bargaining Agreement(s): No</td>
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<td><strong>Estimated # of employees to be retrained under this Agreement:</strong> 5</td>
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<tr>
<td><strong>Company:</strong> Halon</td>
<td><strong>Total # of full-time company employees worldwide:</strong> 25</td>
</tr>
<tr>
<td>Address: 2932 Nebraska Ave.</td>
<td><strong>Total # of full-time company employees in California:</strong> 25</td>
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<tr>
<td>City, State, Zip: Santa Monica, CA 90404</td>
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<td>Collective Bargaining Agreement(s): No</td>
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<td><strong>Estimated # of employees to be retrained under this Agreement:</strong> 10</td>
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<tr>
<td><strong>Company:</strong> &quot;Home Again&quot; - Cast &amp; Crew</td>
<td><strong>Total # of full-time company employees worldwide:</strong> 110</td>
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<tr>
<td>Address: 3025 Olympic Blvd. #300</td>
<td><strong>Total # of full-time company employees in California:</strong> 110</td>
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<tr>
<td>City, State, Zip: Santa Monica, CA 90404</td>
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<tr>
<td>Collective Bargaining Agreement(s): IATSE Local 700; Make-Up Artists and Hair Stylists Guild Local 706</td>
<td></td>
</tr>
<tr>
<td><strong>Estimated # of employees to be retrained under this Agreement:</strong> 20</td>
<td></td>
</tr>
<tr>
<td><strong>Company:</strong> &quot;House Hunters&quot; - HGTV</td>
<td><strong>Total # of full-time company employees worldwide:</strong> 100</td>
</tr>
<tr>
<td>Address: 7655 Haskell Ave.</td>
<td><strong>Total # of full-time company employees in California:</strong> 100</td>
</tr>
<tr>
<td>City, State, Zip: Van Nuys, CA 91406</td>
<td></td>
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<tr>
<td>Collective Bargaining Agreement(s): No</td>
<td></td>
</tr>
<tr>
<td><strong>Estimated # of employees to be retrained under this Agreement:</strong> 25</td>
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ETP 100B (1/09)
# Participating Employers in Retrainee
## Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor’s Name: Studio Arts, Ltd.</th>
<th>CCG No.: ET17-0405</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reference No:</strong> 17-0160</td>
<td><strong>Page:</strong> 7 of 14</td>
</tr>
</tbody>
</table>

- **Company:** InSync AD
- **Address:** 3530 Wilshire Blvd., Suite 1500
- **City, State, Zip:** Los Angeles, CA 90010
- **Collective Bargaining Agreement(s):** No
- **Estimated # of employees to be retrained under this Agreement:** 20
- **Total # of full-time company employees worldwide:** 70
- **Total # of full-time company employees in California:** 70

<table>
<thead>
<tr>
<th>Company: Isolated Ground</th>
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</thead>
<tbody>
<tr>
<td><strong>Address:</strong> 918 Justin Ave.</td>
</tr>
<tr>
<td><strong>City, State, Zip:</strong> Glendale, CA 91201</td>
</tr>
<tr>
<td><strong>Collective Bargaining Agreement(s):</strong> No</td>
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<td><strong>Estimated # of employees to be retrained under this Agreement:</strong> 15</td>
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<td><strong>Total # of full-time company employees worldwide:</strong> 45</td>
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<td><strong>Total # of full-time company employees in California:</strong> 45</td>
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<table>
<thead>
<tr>
<th>Company: Jim Henson Company</th>
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</thead>
<tbody>
<tr>
<td><strong>Address:</strong> 1416 N. La Brea Ave.</td>
</tr>
<tr>
<td><strong>City, State, Zip:</strong> Hollywood, CA 90028</td>
</tr>
<tr>
<td><strong>Collective Bargaining Agreement(s):</strong> No</td>
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<td><strong>Estimated # of employees to be retrained under this Agreement:</strong> 20</td>
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<td><strong>Total # of full-time company employees worldwide:</strong> 76</td>
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<td><strong>Total # of full-time company employees in California:</strong> 76</td>
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<table>
<thead>
<tr>
<th>Company: LA 6721</th>
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</thead>
<tbody>
<tr>
<td><strong>Address:</strong> 6721 Romaine St.</td>
</tr>
<tr>
<td><strong>City, State, Zip:</strong> Los Angeles, CA 90038</td>
</tr>
<tr>
<td><strong>Collective Bargaining Agreement(s):</strong> No</td>
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<tr>
<td><strong>Estimated # of employees to be retrained under this Agreement:</strong> 10</td>
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<tr>
<td><strong>Total # of full-time company employees worldwide:</strong> 50</td>
</tr>
<tr>
<td><strong>Total # of full-time company employees in California:</strong> 50</td>
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</table>
## Participating Employers in Retrainee Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor’s Name: Studio Arts, Ltd.</th>
<th>CCG No.: ET17-0405</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No: 17-0160</td>
<td>Page: 8 of 14</td>
</tr>
</tbody>
</table>

- **Company:** Laundry Design  
  - **Address:** 743 N. Fairfax Ave.  
  - **City, State, Zip:** Los Angeles, CA 90046  
  - **Collective Bargaining Agreement(s):** No  
  - **Estimated # of employees to be retrained under this Agreement:** 5  
  - **Total # of full-time company employees worldwide:** 11  
  - **Total # of full-time company employees in California:** 11

- **Company:** Legacy Effects  
  - **Address:** 340 Parkside Dr.  
  - **City, State, Zip:** San Fernando, CA 91340  
  - **Collective Bargaining Agreement(s):** No  
  - **Estimated # of employees to be retrained under this Agreement:** 30  
  - **Total # of full-time company employees worldwide:** 100  
  - **Total # of full-time company employees in California:** 100

- **Company:** Miramax  
  - **Address:** 2450 Colorado Blvd., Suite 100 East Tower  
  - **City, State, Zip:** Santa Monica, CA 90404  
  - **Collective Bargaining Agreement(s):** No  
  - **Estimated # of employees to be retrained under this Agreement:** 25  
  - **Total # of full-time company employees worldwide:** 99  
  - **Total # of full-time company employees in California:** 99

- **Company:** MGA Entertainment  
  - **Address:** 16300 Roscoe Blvd.  
  - **City, State, Zip:** Van Nuys, CA 91304  
  - **Collective Bargaining Agreement(s):** No  
  - **Estimated # of employees to be retrained under this Agreement:** 50  
  - **Total # of full-time company employees worldwide:** 409  
  - **Total # of full-time company employees in California:** 409

ETP 100B (1/09)
<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s)</th>
<th>Estimated # of employees to be retrained under this Agreement</th>
<th>Total # of full-time company employees worldwide</th>
<th>Total # of full-time company employees in California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mocean</td>
<td>2440 South Sepulveda Blvd., Suite 150</td>
<td>Los Angeles, CA</td>
<td>IATSE Local 700</td>
<td>25</td>
<td>150</td>
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<tr>
<td>Mycotoo Inc.</td>
<td>20 N. Raymond Ave.</td>
<td>Pasadena, CA</td>
<td>No</td>
<td>5</td>
<td>20</td>
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<tr>
<td>NBC Universal</td>
<td>111 Universal Hollywood Dr.</td>
<td>Universal City, CA</td>
<td>No</td>
<td>75</td>
<td>1300</td>
<td>700</td>
</tr>
<tr>
<td>Nickelodeon Animation</td>
<td>231 West Olive</td>
<td>Burbank, CA</td>
<td>IATSE 839</td>
<td>60</td>
<td>250</td>
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</table>
## Participating Employers in Retrainee Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor’s Name: Studio Arts, Ltd.</th>
<th>CCG No.: ET17-0405</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No: 17-0160</td>
<td>Page: 10 of 14</td>
</tr>
</tbody>
</table>

**Company:** "Once Upon A Time" ABC Studios  
**Address:** 500 S. Buena Vista St. MC #8387  
**City, State, Zip:** Burbank, CA 91505  
**Collective Bargaining Agreement(s):** Teamsters Local 399; Make-Up Artists and Hair Stylists Guild Local 706  
**Estimated # of employees to be retrained under this Agreement:** 25  
**Total # of full-time company employees worldwide:** 100  
**Total # of full-time company employees in California:** 100

<table>
<thead>
<tr>
<th>Company: Open Road Entertainment</th>
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<tbody>
<tr>
<td><strong>Address:</strong> 3003 W. Olive Ave.</td>
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<tr>
<td><strong>City, State, Zip:</strong> Burbank, CA 91505</td>
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<td><strong>Collective Bargaining Agreement(s):</strong> No</td>
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<td><strong>Estimated # of employees to be retrained under this Agreement:</strong> 20</td>
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<td><strong>Total # of full-time company employees worldwide:</strong> 58</td>
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<td><strong>Total # of full-time company employees in California:</strong> 58</td>
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<table>
<thead>
<tr>
<th>Company: &quot;Pitch&quot; 20th Century Fox</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Address:</strong> 5555 Melrose Ave., Bow Building 1st Floor</td>
</tr>
<tr>
<td><strong>City, State, Zip:</strong> Los Angeles, CA 90038</td>
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<td><strong>Collective Bargaining Agreement(s):</strong> No</td>
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<td><strong>Estimated # of employees to be retrained under this Agreement:</strong> 25</td>
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<td><strong>Total # of full-time company employees worldwide:</strong> 175</td>
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<td><strong>Total # of full-time company employees in California:</strong> 175</td>
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<table>
<thead>
<tr>
<th>Company: Play Network</th>
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</thead>
<tbody>
<tr>
<td><strong>Address:</strong> 15301 Ventura Blvd., Building D, Suite 200</td>
</tr>
<tr>
<td><strong>City, State, Zip:</strong> Sherman Oaks, CA 91403</td>
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<td><strong>Collective Bargaining Agreement(s):</strong> No</td>
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## Participating Employers in Retrainees

### Multiple Employer Contracts

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<th>Contractor’s Name: Studio Arts, Ltd.</th>
<th>Reference No: 17-0160</th>
<th>CCG No.: ET17-0405</th>
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<tbody>
<tr>
<td>Company: Pretty in Plastic</td>
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<tr>
<td>Address: 6818 Vineland Ave.</td>
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</tr>
<tr>
<td>City, State, Zip: North Hollywood, CA 91605</td>
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<tr>
<td>Total # of full-time company employees in California: 4</td>
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</table>

| Company: Psychic Bunny              |                        |                     |
| Address: 543 South Spring St. Suite 620 |                    |                     |
| City, State, Zip: Los Angeles, CA 90013 |                    |                     |
| Collective Bargaining Agreement(s): IATSE Local 839 |                    |                     |
| Estimated # of employees to be retrained under this Agreement: 5 |                    |                     |
| Total # of full-time company employees worldwide: 7 |                    |                     |
| Total # of full-time company employees in California: 7 |                    |                     |

| Company: Renegade Animation         |                        |                     |
| Address: 111 E. Broadway Suite 208  |                        |                     |
| City, State, Zip: Glendale, CA 91205 |                    |                     |
| Collective Bargaining Agreement(s): No |                      |                     |
| Estimated # of employees to be retrained under this Agreement: 15 |                    |                     |
| Total # of full-time company employees worldwide: 32 |                    |                     |
| Total # of full-time company employees in California: 32 |                    |                     |

| Company: Shadow Animation           |                        |                     |
| Address: 940 N. Mansfield Avenue    |                        |                     |
| City, State, Zip: Los Angeles, CA 90038 |                    |                     |
| Collective Bargaining Agreement(s): No |                      |                     |
| Estimated # of employees to be retrained under this Agreement: 25 |                    |                     |
| Total # of full-time company employees worldwide: 97 |                    |                     |
| Total # of full-time company employees in California: 70 |                    |                     |
## Participating Employers in Retrainees Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor’s Name</th>
<th>CCG No.:</th>
<th>Reference No:</th>
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<tbody>
<tr>
<td>Studio Arts, Ltd.</td>
<td>ET17-0405</td>
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<tr>
<td>SGPS Showrig</td>
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<tr>
<td>3420 Ocean Park Blvd., Suite 100</td>
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<tr>
<td>Santa Monica, CA 90405</td>
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<tr>
<td>Sideshow Inc.</td>
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<tr>
<td>2630 Conejo Spectrum St.</td>
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<tr>
<td>Thousand Oaks, CA 91320</td>
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<td>Spectral Motion</td>
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<tr>
<td>1849 Dana St.</td>
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<tr>
<td>&quot;Speechless&quot; - Fox Studios</td>
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<tr>
<td>10201 W. Pico Blvd., Building 104, 3rd Floor</td>
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<td></td>
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<tr>
<td>Los Angeles, CA 90064</td>
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## Participating Employers in Retraine
### Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor’s Name: Studio Arts, Ltd.</th>
<th>CCG No.: ET17-0405</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No: 17-0160</td>
<td>Page: 13 of 14</td>
</tr>
<tr>
<td><strong>Company:</strong> Standardvision</td>
<td></td>
</tr>
<tr>
<td><strong>Address:</strong> 1320 N. Wilton Pl.</td>
<td></td>
</tr>
<tr>
<td>City, State, Zip: Los Angeles, CA 90028</td>
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</tr>
<tr>
<td><strong>Collective Bargaining Agreement(s):</strong> No</td>
<td></td>
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<tr>
<td>Estimated # of employees to be retrained under this Agreement: 20</td>
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<tr>
<td>Total # of full-time company employees worldwide: 65</td>
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<tr>
<td>Total # of full-time company employees in California: 48</td>
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</tbody>
</table>

| **Company:** Studio 8               |                    |
| **Address:** 10202 W. Washington Blvd., 1000 Poitier |                |
| City, State, Zip: Culver City, CA 90293 |                |
| **Collective Bargaining Agreement(s):** No |                  |
| Estimated # of employees to be retrained under this Agreement: 15 |        |
| Total # of full-time company employees worldwide: 37 |          |
| Total # of full-time company employees in California: 37 |            |

| **Company:** Titmouse               |                    |
| **Address:** 6616 Lexington Ave.    |                    |
| City, State, Zip: Los Angeles, CA 90038 |                |
| **Collective Bargaining Agreement(s):** IATSE 839 |                  |
| Estimated # of employees to be retrained under this Agreement: 50 |        |
| Total # of full-time company employees worldwide: 150 |          |
| Total # of full-time company employees in California: 150 |            |

| **Company:** Trailer Park           |                    |
| **Address:** 6922 Hollywood Blvd., 12th Floor |                |
| City, State, Zip: Hollywood, CA 90028 |                |
| **Collective Bargaining Agreement(s):** No |                  |
| Estimated # of employees to be retrained under this Agreement: 100 |        |
| Total # of full-time company employees worldwide: 466 |          |
| Total # of full-time company employees in California: 466 |            |
## Participating Employers in Retrainee Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor’s Name: Studio Arts, Ltd.</th>
<th>CCG No.: ET17-0405</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No: 17-0160</td>
<td>Page: 14 of 14</td>
</tr>
<tr>
<td><strong>Company:</strong> Wyatt Design Group</td>
<td></td>
</tr>
<tr>
<td><strong>Address:</strong> 572 East Green Street, Suite 200</td>
<td></td>
</tr>
<tr>
<td><strong>City, State, Zip:</strong> Pasadena, CA 91101</td>
<td></td>
</tr>
<tr>
<td><strong>Collective Bargaining Agreement(s):</strong> No</td>
<td></td>
</tr>
<tr>
<td><strong>Estimated # of employees to be retrained under this Agreement:</strong> 5</td>
<td></td>
</tr>
<tr>
<td><strong>Total # of full-time company employees worldwide:</strong> 10</td>
<td></td>
</tr>
<tr>
<td><strong>Total # of full-time company employees in California:</strong> 10</td>
<td></td>
</tr>
</tbody>
</table>

| Company: YTC Summit                  |                   |
| **Address:** 12037 Clark Street      |                   |
| **City, State, Zip:** Arcadia, CA 91106 |             |
| **Collective Bargaining Agreement(s):** No |         |
| **Estimated # of employees to be retrained under this Agreement:** 5 | |
| **Total # of full-time company employees worldwide:** 15 |          |
| **Total # of full-time company employees in California:** 15 |          |
To Whom It May Concern:

The Motion Picture Editors Guild, I.A.T.S.E. Local 700, supports Studio Art’s effort to participate in the ETP Program. Local 700 represents over 6000 members, many of whom would and already have benefited from the ETP Program.

Our industry is constantly undergoing technological changes so it is critical that our members utilize training to keep their skills up to date. They must continue their training as new systems and related software become available.

Should you have any questions or if there is anything we can do to facilitate Studio Art’s participation in ETP, please let us know.

Sincerely,

Dieter Rozek
Training Coordinator
11/25/2016

To whom it may concern,

My name is Tommy Cole, and I am the Business Representative for local 706, Make-up Artists and Hair Stylists Guild. I wish to voice our Local’s support for ETP funding for Studio Arts for the coming year.

It is our position that ETP Training is a tremendous asset for our members to remain competitive on the job. In the past, Studio Arts has provided ETP training to our 706 members who work at various production companies within our jurisdiction, and the training initiatives that have been offered by the Employment Training Panel has kept our frontline artists at the ready for trends that happen quickly and often in our industry. We are very pleased at the significant upgrades to their skill levels that have come as a result of such training, and we look forward to Studio Arts being involved again next year.

If you have any questions regarding this matter, please feel free to contact me at my office at 818 295-3933, Ext. 1100.

Sincerely,

[Signature]

Business Representative

Local 706

Make-Up Artists & Hair Stylists Guild

I.A.T.S.E. Local 706

828 N. Hollywood Way

Burbank, CA 91505
To Whom It May Concern:

This letter is in order to voice Teamsters Local 399 support for ETP funding for Studio Arts for the coming year. It is our understanding that there have been budget constraints that may limit funding the Entertainment Industry MEC that Studio Arts has applied for, and we are concerned over this matter.

For years now Studio Arts has provided ETP training to our Teamsters Local 399 Brothers and Sisters who work on various productions throughout California. Many of these companies do not have the resources to do the types of training that Studio Arts provides to keep our Members at the top of their game where it comes to advanced technical skills sets.

Therefore, we ask that you please find a way to fund this training in order that we can satisfy the skills needs for our Membership to remain competitive for jobs likely to require them in the future.

If you have any questions regarding this matter, please do not hesitate to contact me at eduffy@ht399.org or by phone at (818) 432-3306.

Sincerely,

Ed Duffy
Vice President
eduffy@ht399.org
November 28, 2016

To Whom It May Concern:

The Animation Guild, IATSE Local 839, is pleased to support Studio Arts' continued participation in the ETP Training Program.

Local 839 represents over three thousand animation artists and technicians in the Southern California area. The training offered to our members through Studio Arts funded by the state through the ETP program is a key factor in keeping our members up to date on the latest skills and techniques in an ever-evolving landscape of software used in animation production.

Mr. Huelsman's commitment to bringing the highest quality training to the entertainment community that adjusts constantly to the needs of production across the different sectors of entertainment is lauded by both our members, and members of sister IATSE locals across the Southern California Region. We look forward to his continued service to those members and our contracted studio partners.

Please feel free to contact me with any questions or concerns.

Sincerely,

Steve Hulett,
Business Representative
The Animation Guild, Local 839 IATSE
November 28, 2016

To Whom It May Concern:

Our union, IATSE Local 871, enthusiastically supports the proposed ETP training offered at Studio Arts. ETP training has proven to be a valuable means for our membership to remain highly trained and competitive on the job.

It is our view that funding such as that given through Employment Training Panel keeps our members informed and ready for changes that happen quickly and often in our industry.

As a result, we are pleased to endorse ETP and the significant upgrades in our artists' skills that have and can continue to come through this valuable training.

If you have any questions regarding this matter, please feel free to contact me at (818) 509-7871, ext. 105.

Sincerely,

Leslie Simon
Business Representative
IATSE Local 871
Training Proposal for:

Ventura County Electrical Joint Apprenticeship and Training Committee

Agreement Number: ET17-0929

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Veterans</th>
<th>SET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td>Construction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>☒ Yes</td>
<td>☐ No</td>
<td></td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Ventura</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repeat Contractor:</td>
<td>☒ Yes</td>
<td>☐ No</td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>☒ Yes</td>
<td>☐ No</td>
<td></td>
</tr>
<tr>
<td></td>
<td>International Brotherhood of Electrical Workers, Local 952 and the National Electrical Contractors Association, Ventura Division of Los Angeles County Chapter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>≤20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL:

\[
\text{Program Costs} + \text{Support Costs} = \text{Total ETP Funding}
\]

\[
\begin{align*}
\text{Program Costs} & = $182,400 \\
\text{Support Costs} & = $12,600 \\
\text{Total ETP Funding} & = $195,000
\end{align*}
\]

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

Inherent
# TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineen SET Journeyman</td>
<td>Business Skills, Commercial Skills, OSHA 10/30</td>
<td>50</td>
<td>8-200</td>
<td>0</td>
<td>Weighted Avg: 24</td>
</tr>
<tr>
<td>2</td>
<td>Retraineen SET Apprentice</td>
<td>Commercial Skills, OSHA 10</td>
<td>53</td>
<td>8-210</td>
<td>0</td>
<td>Weighted Avg: 200</td>
</tr>
<tr>
<td>3</td>
<td>Retraineen SET Apprentice Veterans</td>
<td>Commercial Skills, OSHA 10</td>
<td>7</td>
<td>8-210</td>
<td>0</td>
<td>Weighted Avg: 200</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** Job Numbers 1-3: $22.04 per hour to meet Statewide Average 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 Participating employers may use health benefits to meet the Post-Retention Wage.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journeymen Electrician</td>
<td></td>
<td>50</td>
</tr>
<tr>
<td>Apprentice Electrician (2nd-5th year)</td>
<td></td>
<td>53</td>
</tr>
<tr>
<td>Apprentice Electrician</td>
<td></td>
<td>7</td>
</tr>
</tbody>
</table>

## INTRODUCTION

Founded in 1977, Ventura County Electrical Joint Apprenticeship Committee (Ventura JATC) provides up-to-date construction skills training. Ventura JATC is a joint effort of the International Brotherhood of Electrical Workers (IBEW) Local 952 and the National Electrical Contractors Association (NECA). It is governed by a Board of Trustees and comprised of four labor and four management representatives.
Ventura JATC currently represents approximately 429 electricians in Ventura County. This is the fourth ETP Agreement with Ventura JATC. This is the first time Veterans have been introduced as a distinct cohort of Apprentice trainees.

Participating employers and union representatives have worked alongside Ventura JATC to identify business needs and areas that require improvement. These areas include training topics to meet energy efficiency regulations and higher quality standards, reduce costs, and improved skill sets of workers to staff a retiring workforce. The Apprenticeship program is customized to place its graduates in to “learn while you earn” apprenticeships that provide quality wages and entry into a lifelong career within the local community.

PROJECT DETAILS

Ventura JATC provides training to inside wiremen responsible for wiring and installation of electrical systems found in commercial and industrial buildings, electrical vehicle stations, and transit systems. Duties include installation of power, lighting, controls, and other electrical equipment. Apprentices of Ventura JATC will perform approximately 8,000 on-the-job hours over a five-year time period. In addition, Apprentices will complete 1,080 classroom training hours (two nights per week).

Training delivered by qualified electricians (Journeymen) ensure trainees can perform installation and maintenance of various wiring methods for distribution of electrical light, heat, power, radio, and utilization systems. Training topics include Blueprint Reading, Torque Fundamentals, Process Instrumentation, Project Estimating, Electrical Test Instruments, and Fiber Optics.

Training Plan

Input from labor and management representatives was utilized to ensure Ventura JATC developed curriculum topics that would meet the industry and business needs of participating employers. Curriculum topics will include new green practices on how to use new building materials, install solar photovoltaic panels and motor controls, and perform green materials testing. It is important Ventura JATC provide training in these areas to ensure Electricians are in compliance and up-to date with emerging technologies that focus on renewable energy and highly efficient electrical control systems.

Journeymen Training:

Business Skills (80%): Training will be offered to journey-level workers to learn national building codes, green practices, and certification guidelines. Training will give trainees the tools to plan, organize, train, and manage construction projects to complete job tasks efficiently and on time.

Commercial Skills (5%) Training will be offered to all occupations to learn up-to-date techniques to install, maintain, and repair electronic equipment used in commercial, industrial, and residential buildings.

OSHA 10/30 (15%): Training will be offered to all occupations. 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.
**Apprentice Training:**

**Business Skills (90%):** Training will be offered to Apprentices to learn skills required to install, maintain, and repair electrical equipment/systems. Training will enable workers to establish grounding systems, provide power and controls, and troubleshoot electrical systems.

**OSHA 10 (10%):** Training will be offered to all occupations. This training is a series of courses “bundled” by industry sector and occupation. OSHA 10 training will provide Apprentice with up-to-date skills to work safely. The 10-hour course entails proper ways to maneuver in dangerous work conditions.

**Apprenticeship Program**

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the 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 $18 to $13 per hour. In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (<100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26).

The ETP wage for Apprentices is no less than $22.04 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $22.04, for both Apprentices and Journeymen.

**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**

Ventura JATC has hired a third party for administrative services for this Agreement. In addition, the JATC has assigned one full-time employee to assist with ETP recordkeeping, scheduling, and various administrative duties as needed.

**Marketing and Support Costs**

Ventura JATC will market their program throughout the duration of this Agreement. Staff members will market Apprentice and Journeymen courses through direct mailings, personal contacts, public service announcements, emails, and informational flyers. Application
announcements for the program are disseminated to community organizations, high schools and colleges, and local, state, and federal agencies. Recruitment and assessment activities will remain on-going for Ventura JATC staff. As a result, the JATC is requesting 8% in support costs.

Veterans Program

A total of 7 Veterans will be trained by Ventura JATC under this Agreement (Job Number 3). The Panel has established a higher reimbursement rate and other incentives for training California Veterans. These trainees served on active full-time duty in the Armed Forces, including the California National Guard, and were (a) honorably discharged, or (b) released from active duty because of a service-connected disability.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0911</td>
<td>$222,800</td>
<td>10/05/15-10/04/17</td>
<td>146</td>
<td>146</td>
<td>125</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 13,885 reimbursable hours have been tracked for potential earnings of $195,436 (87% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through March 2017. A total of 125 trainees have completed the 90-day retention period. Ventura JATC plans to finalize invoicing by April 2017.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>Payment Earned %</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0908</td>
<td>Oxnard</td>
<td>01/02/14-01/01/16</td>
<td>$315,340</td>
<td>$201,649</td>
<td>(63%)</td>
</tr>
</tbody>
</table>

ET14-0908: A total of 87 Apprentices were enrolled; however, 16 did not complete retention. In addition, Ventura JATC enrolled only 60% of their estimated number of Journeymen (92 of 150), of which only 50% met performance standards.

This performance resulted in “right sizing” the Active Project ET16-0911.
DEVELOPMENT SERVICES

California Labor Federation in Sacramento and Strategy Workplace Communications in Oakland assisted with development of this proposal at no cost.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200  Job 1  Trainees may receive any of the following:

Journeymen Training

COMMERCIAL SKILLS
- DC Theory
- Orientation to Organization and Structures
- Electrical Test Instruments
- National Electrical Codeology
- Blueprint Reading and Specifications
- AC Theory
- Conduit Bending & Raceway Installations
- Transformers
- Grounding and Bonding
- Overcurrent Protection
- National Electrical Code Calculations
- Photovoltaic Systems
- Rigging and Lifting Fundamentals
- Torque Fundamentals
- Electrical Safe Work Practices based on the NFPA70E
- Motors & Motor Control Systems
- Programmable Logic Controllers (PLC’s)
- Process Instrumentation
- Fire Alarm Systems
- Security Systems
- Low Voltage Structured Wiring Systems
- Fiber Optics
- Hazardous Locations
- Hand Tools and Power Tools
- Mathematics for Electrical Workers
- Wiring Methods and Materials
- California Advanced Lighting Controls Program (CALCTP)
- Building Automation Systems
- Electric Vehicle Infrastructure Training Program (EVITP)
- Electrical Project Supervision
- CPR/First-Aid/AED
- Lockout-Tagout Methods
- Confined Space Entrant & Attendant
- Forklift and Aerial Lift Safety

BUSINESS SKILLS
- Project Estimating
- Project Planning and Scheduling
- Completing Work Reports
- Team Building Skills
- AutoCAD
**OSHA Safety (Certified OSHA Instructor)**
- OSHA 10 (Requires completion of 10 hour course)
- OSHA 30 (Requires completion of 30 hour course)

**Class/Lab Hours**
8-210 Jobs: 2-3

**Apprentice Training**

**COMMERCIAL SKILLS**
- DC Theory
- Orientation to Organization and Structures
- Electrical Test Instruments
- National Electrical Codeology
- Blueprint Reading and Specifications
- AC Theory
- Conduit Bending & Raceway Installations
- Transformers
- Grounding and Bonding
- Overcurrent Protection
- National Electrical Code Calculations
- Photovoltaic Systems
- Rigging and Lifting Fundamentals
- Torque Fundamentals
- Electrical Safe Work Practices based on the NFPA70E
- Motors & Motor Control Systems
- Programmable Logic Controllers (PLC’s)
- Process Instrumentation
- Fire Alarm Systems
- Security Systems
- Low Voltage Structured Wiring Systems
- Fiber Optics
- Hazardous Locations
- Hand Tools and Power Tools
- Mathematics for Electrical Workers
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- California Advanced Lighting Controls Program (CALCTP)
- Building Automation Systems
- Electric Vehicle Infrastructure Training Program (EVITP)
- Electrical Project Supervision
- CPR/First-Aid/AED
- Lockout-Tagout Methods
- Confined Space Entrant & Attendant
- Forklift and Aerial Lift Safety

**BUSINESS SKILLS**
- Project Estimating
- Project Planning and Scheduling
- Completing Work Reports
- Team Building Skills
- AutoCAD

**OSHA Safety (Certified OSHA Instructor)**
- OSHA 10 (Requires completion of 10 hour course)
- OSHA 30 (Requires completion of 30 hour course)

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 in Job 1 per trainee, regardless of the method of delivery. Reimbursement for retraining is capped at 210 total training hours per trainee in Job Numbers 2-3. |
Riverside Community College District, Office of Economic Development

WITHDRAWN
Training Proposal for:

Urban Corps of San Diego County Charter School

Agreement Number: ET17-0406

Panel Meeting of: February 23, 2017

ETP Regional Office: San Diego  Analyst: J. Davey

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>SET</td>
<td>Construction</td>
</tr>
<tr>
<td>At-Risk Youth</td>
<td>Services</td>
</tr>
<tr>
<td>Ex-Offender</td>
<td>Green Technology</td>
</tr>
<tr>
<td>Multiple Barriers</td>
<td></td>
</tr>
<tr>
<td>New Hire</td>
<td>Priority Industry:</td>
</tr>
<tr>
<td></td>
<td>□ Yes □ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Diego</td>
<td>□ Yes □ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Turnover Rate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Yes □ No</td>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors: (% of total trainees)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>$260,000</td>
<td>$24,950</td>
</tr>
</tbody>
</table>

12%

= Total ETP Funding

<table>
<thead>
<tr>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$284,950</td>
</tr>
</tbody>
</table>

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

Inherent
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>New Hire SET</td>
<td>Business Skills, Commercial Skills, Computer Skills, Literacy Skills,</td>
<td>50</td>
<td>8-260</td>
<td>$5,699</td>
<td>*$10.50</td>
</tr>
<tr>
<td></td>
<td>Ex-Offender</td>
<td>OSHA 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>At-Risk Youth</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*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:** San Diego County (SET Multiple Barriers/waiver) – Job Number 1: $10.50

**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**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative/Office Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Construction Worker</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Customer Service Representative</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Hospitality Representative</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Janitor/Maintenance</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Landscaper</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Recycling Specialist</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Retail Associate</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Urban Corps of San Diego County Charter School (Urban Corps) (http://urbancorpssd.org/) was founded by the San Diego City Council in 1989. At the time, the organization ran the onsite charter high school. However, Urban Corps split off in 2011 and became an independent 501(c)(3) entity, operating in conjunction with Urban Corps of San Diego County. The Charter School offers participants an accelerated WASC-accredited high school diploma program, job training, and complete career and support services, including case management, career and psychological counseling, certified training programs, life skills, vocational coursework, and job placement services.
Urban Corps provides under-served, low-income young adults ages 18-23 with the opportunity to improve themselves while improving their own communities. It provides a second chance at a high school education and paid workforce readiness training designed to encourage skill acquisition, civic engagement, responsibility, and self-sufficiency. Corps members receive training in green construction, landscaping/irrigation, and recycling and environmental waste management, as well as literacy and life skills to make them employment ready.

Urban Corps is affiliated with YouthBuild USA Affiliated Network, and has created a YouthBuild program to complement its existing job training and education programs. YouthBuild, an internationally recognized model of youth and community development which works to comprehensively improve the lives of young people while enhancing affordable housing options in the community, is designed to be a training ground for youth seeking to enter the construction fields. The YouthBuild model includes five major components: construction training, education, counseling and case management, leadership development, and transitional services to promote graduate success. YouthBuild students at Urban Corps receive on-site and classroom-based vocational training in the construction field, leading to industry-recognized certifications and the production and rehabilitation of affordable housing. Counseling, case management, life skills, computer and financial literacy, career readiness, and transitional services are provided through the Corps-to-Career department.

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), created in statute effective January 1, 2010.

In keeping with the Panel's standards, Urban Corps is eligible as a training agency through certification by the Western Association of Schools and Colleges (WASC).

Prior Performance

This is the second new hire training proposal for Urban Corp of San Diego Charter School. In its first project, it provided valuable job-training, life skills, and post-program services to hard-to-serve, disadvantaged young people. Urban Corps was able to place 30 of these young adults in a variety of construction, landscaping, recycling and related jobs.

For this project, Urban Corps has increased the number of projected trainees to 50 and has developed partnerships with additional employers, workforce development agencies, and other organizations that agree to hire these workers. Urban Corps is confident that its experience in its first ETP project has allowed it to expand its outreach to these new participating employers.

Special Employment Training

This project is funded under Special Employment Training (SET) funding category because the trainees do not have a history of Unemployment Insurance (UI) payments.

- Multiple Barriers

Trainees have two or more barriers to employment (e.g., mental or physical disability, limited English proficiency, limited math skills). Trainees come from a hard-to-serve population that may have no previous employment history. With a lack of basic academic, job-readiness skills, and work experience and a variety of personal issues (including legal, childcare, housing, health, and substance abuse), it is extremely difficult for trainees to enter, much less succeed in, the
workforce. Although SET will be used to fund this training, there is a provision allowing a wage modification as described below.

- **Ex-Offender/At-Risk Youth**

In addition to the Multiple Barrier criteria, all trainees qualify for funding under the Ex-Offender/At-Risk Youth Guidelines.

Urban Corp’s mission since its founding has been to serve the education and employment needs of low-income and underserved youth in San Diego County. As such, the agency will provide training to young adults (18-23) who are burdened with barriers to employment such as lack of job skills and experience, lack of education, and lack of self-esteem. Nearly 100% of Corps members meet Federal Poverty levels, and over 80% have additional barriers to employment such as lack of transportation, need for child-care, language barriers, homelessness, court and gang involvement, drug abuse, and limited social skills. Many are refugees with limited English skills. Participation as a Corps member in the educational and vocational programs has been shown to lower the incidence of incarceration, gang involvement, and drug abuse, while increasing self-esteem, employability, and sense of environmental responsibility. Urban Corps School may serve At-Risk-Youth and/or Ex-Offenders.

- Urban Corps 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.

- **Wage Modification**

Consistent with the aforementioned Multiple Barrier/Minimum Wage modification waiver request, Urban Corps is requesting a post-retention wage modification permitted under the Ex-Offender/At-Risk-Youth guidelines for these trainees at 25% below the ETP Standard New Hire Wage. The modification will decrease the post-retention wage from $13.94 per hour to $10.50 per hour, a 24.6% decrease.

- **Incidental Placement**

Incidental placement with public and nonprofit entities is permissible for these trainees at up to 35% of total placement. Urban Corps does not expect to exceed 25% of total placements.

- **Job Placement/Employer Demand**

After training, Urban Corps places trainees in green construction, landscaping, and environmental/recycling jobs. Urban Corps’ Corps-to-Career Department meets with employers regularly to form partnerships and assess workforce needs in order to place Corps members in jobs following graduation. Urban Corps has partner agreements and MOUs with a variety of organizations and employers (Shelter Cove Marina, Alvarado Hospital, Grant Hotel, Solar Turbines, Miramar Nurseries, Terra Bella Nursery, One Earth Recycling, Recon Recycling, Sheraton San Diego Harbor & Marina, Allied Barton, Cal Marine, Mark Schroeder Landscaping, Cintas, Marriott, Pacific Coast Steel, Nuera Construction, Grondin Construction and others) to recruit Corps members and provide job referrals, and it continues to develop more relationships.
Marketing and Support Costs

Urban Corps requests support costs of 12%. It maintains a multi-faceted Marketing and Development Department to recruit trainees and promote its overall mission, projects, services, funding partners, and sponsors. Staff attend job fairs each year and place ads in local newspapers to encourage enrollment. Projects, news, and support from sponsoring organizations are shared by the Communications & Development Manager through the Urban Corps website, quarterly newsletter, the organization's Facebook and Twitter pages, email blasts to friends and supporters and news releases to local media.

The Communications & Development Manager creates high-quality, graphically designed outreach flyers, press kits, fact sheets, and enrollment postcards. Urban Corps’ social media platforms include Twitter, YouTube and two Facebook pages (one for general organization postings and one for alumni). Most Corps members hear about Urban Corps by word of mouth, so the alumni Facebook page is an excellent way to recruit new trainees. Urban Corps’ YouTube channel features videos that highlight youth job training and education efforts as well as the impact the Corps makes in the community.

In addition, prior to affiliating with YouthBuild, Urban Corps formed partnerships with the San Diego Building Trades Council, the San Diego Building Industry Association (BIA), a variety of construction companies, and the unions in order to assess workforce needs. According to the BIA and partners in the construction industry, the building trades will soon experience a deficit in skilled laborers due to a retiring generation of tradesmen and the recent economic downturn, which hit the building and real estate industries hard, that resulted in an exodus of workers and reluctance to learn trades. Urban Corps YouthBuild will help prepare youth to fill these positions. A variety of partnerships with employers—such as One Earth Recycling, Recon Recycling, Alvarado Hospital, the Sheraton, and Shelter Cove Marina—place Corps members in paid internships managing recycling programs.

Staff recommends 12% support costs for the activities described above. This is consistent with Panel standards for New Hire training.

PROJECT DETAILS

Training Coordinator

The responsibility for scheduling, monitoring and delivering training is divided across program areas. Program development and budgeting will be the responsibility of the Dean of Education in collaboration with the Chief Operating Officer. Training will be overseen and administered by the Director of Operations and 3 Program Managers. Recruitment and Marketing will be administered by the Human Resources Manager and 3 members of her team. Lead scheduling and roster tracking/administrative responsibilities will fall to 3 Program Coordinators.

Training Plan

All classroom/laboratory training is center-based and will occur at Urban Corps' training facilities in San Diego. The remaining training will be conducted by qualified instructors. All Urban Corp instructors maintain appropriate training certifications. Total training hours are capped at 260 hours as allowed for new-hire training. Training is delivered in three tracks: Construction, Landscape, and Green/Recycling.
Commercial Skills (55%): Training will be offered to all trainees. Training content is based on skills needed when working at various work sites. Training will cover the use of hand tools and power tools, tool identification, forklift operation, green construction skills, basic carpentry, landscaping and maintenance, waste management, workplace safety (including personal protective equipment, back/ear protection, hazmat recognition), team-building, and Multi-Craft Core curriculum (MC3).

Business Skills (10%): Trainees will be offered to all trainees. Trainees will receive “life-skills in Interpersonal Communications, Preventing/Responding to Workplace Aggression, Social Media & Sexual Harassment, and other related skills.

Computer Skills (4%): Training will be offered to all trainees. Training content will be focused on introduction to the basics of Personal Computers and tablets for work and Excel for business applications.

Literacy Skills (27%): Training will be offered to all trainees. Training content will be provided in Construction Math, and Writing & Communication.

OSHA 10 (4%): This training is a series of courses “bundled” by industry sector and occupation. Completion of the training results in a certificate that expands employment opportunities. Typically, it is delivered to workers in the building trades. All trainees will receive training in OSHA 10 to prepare them for working safely on construction sites. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour course.

This training is not required as a condition of doing business in California. However, both the coursework and the instructors must be approved and certified by Cal-OSHA.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Urban Corps San Diego under an ETP Agreement that was completed within the last five years:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0230</td>
<td>San Diego</td>
<td>9/2/14 – 9/1/16</td>
<td>$165,960</td>
<td>$150,555</td>
<td>(91%)</td>
</tr>
</tbody>
</table>

Urban Corps San Diego is expected to earn $150,555 in earnings for a total of 30 trainees. The organization delivered more than twice the number of eligible training hours (more than 17,000 hours) to 89 trainees for an average of 192 hours per trainee.
DEVELOPMENT SERVICES
N/A

ADMINISTRATIVE SERVICES
N/A

TRAINING VENDORS
N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8-260

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Interpersonal Communication Skills
- Marketing & Outreach
- Preventing/Responding to Workplace Aggression
- Social Media & Sexual Harassment
- Corps-to-Career Life Skills Workshop
- Corps-to-Career Resumé Building, Mock Interviews, Self-Presentation

**COMMERCIAL SKILLS**
- Construction Training – MC3 & BPI, Fire Fuel Reduction
- Landscaping & Irrigation Tech Training
- Waste/Recycling Management
- Forklift Training
- Tool Identification & Proper Usage
- Workplace Safety:
  - Personal Protective Equipment (PPE)
  - Preventing Slips, Trips & Falls
  - Working Safely Outdoors
  - First Aid/CPR

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

**COMPUTER SKILLS**
- Basic Computing
- Excel

**OSHA 10** (OSHA certified instructor)
- OSHA 10

**LITERACY SKILLS**
- Construction Math
- Writing & Communication

Literacy training cannot exceed 50% of total training hours per-trainee

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

Alameda County Electrical Industry Apprenticeship and Training Trust

Agreement Number: ET17-0924

Panel Meeting of: February 23, 2017

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

**PROJECT PROFILE**

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraineep</th>
<th>Priority Rate</th>
<th>Apprenticeship</th>
<th>Veterans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector:</td>
<td>Construction Green Technology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>☒ Yes</td>
<td>☐ No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Alameda</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repeat Contractor:</td>
<td>☒ Yes</td>
<td>☐ No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>☒ Yes</td>
<td>☐ No</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>National Brotherhood of Electrical Workers Local 595</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>≤20%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>% of total trainees</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**FUNDING DETAIL**

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$468,800</td>
<td>$32,400 8%</td>
<td>$501,200</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 50% of Total ETP Funding Required  Inherent
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Priority Rate Journeyman</td>
<td>Commercial Skills, Business Skills, Computer Skills, OSHA10/30</td>
<td>100</td>
<td>8-200</td>
<td>0</td>
<td>$564</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 24</td>
</tr>
<tr>
<td>2</td>
<td>Retraineer Apprentice</td>
<td>Commercial Skills, OSHA10/30</td>
<td>154</td>
<td>8-210</td>
<td>0</td>
<td>$2,780</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 200</td>
</tr>
<tr>
<td>3</td>
<td>Retraineer Apprentice Veteran</td>
<td>Commercial Skills, OSHA10/30</td>
<td>6</td>
<td>8-210</td>
<td>0</td>
<td>$2,780</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 200</td>
</tr>
</tbody>
</table>

### Minimum Wage by County:
- Job Numbers 1-3 (Statewide/Priority Industry): $22.04 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

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

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journeyman Electrician</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Apprentice and Veteran Apprentice Electrician</td>
<td>160</td>
<td></td>
</tr>
</tbody>
</table>

## INTRODUCTION

The Alameda County Electrical Industry Apprenticeship and Training Trust (Alameda Electrical Trust) ([www.595jatc.org](http://www.595jatc.org)) is a joint labor-management organization between the Northern California Chapter, National Electrical Contractors Association and the Local 595 International Brotherhood of Electrical Workers. Founded in 1946, the Trust provides funds for training in electrical inside wiring for Apprentice, Pre-Apprentice and Journeyman.

The Board of Trustees is comprised of four labor representatives and four management representatives (an estimated 346 employers). The same composition is true for the Alameda County Electrical Joint Apprenticeship and Training Committee, sponsor of the program. A JATC is created through collective bargaining, with an equal number of members appointed by union and management with employer contributions to a training trust fund. The employers are not “participants” but are signatories to the Collective Bargaining Agreement.

In May of 2013, the Alameda Electrical Trust opened its new Zero Net Energy Training Center in San Leandro. The training center is one of only a handful of U.S. Department of Energy-designated “zero net energy” buildings in the nation. This unique, state-of-art training facility continues to help Electricians prepare for California’s energy conservation and renewable energy efforts.
The Trust currently serves 200 apprentices, 1,652 journeymen, and 30 pre-apprentices. This is the Trust’s sixth ETP project and the fourth within the last five years (see Active and Prior Project Tables at end of this memo).

Electricians plan, install, test, repair and maintain electrical equipment that provide light, heat, communications, and power. It is the Trust’s mission to ensure workers have the most advanced technology skills training possible. In addition, the Trust provides training, which helps decrease the frequency of workplace accidents and injury. To be competitive in today’s green construction industry, Electricians require the skills to install green electrical systems as well as meet Title 24 requirements. Title 24 mandates the use of automated lighting control devices and automatic plug load circuit controls.

Because of new regulations, many contractors in the construction industry are requiring multiple certifications for both Apprentices and Journeymen. The Trust has to ensure that additional instructors are certified to deliver more frequent and various types of certification classes. In addition, many of the certification classes require new classroom training equipment. Without support from ETP funding, these new costs would mean that the Trust would hold fewer classes and serve fewer workers. ETP funding will help expand its classes to meet employer demand for certified workers, and to train the growing number of newly registered Apprentices.

Employer Demand

As Journeyman Electricians retire and new work develops in Alameda County, training will ensure that there are enough qualified Electricians to meet the needs of employers in Alameda County. The Trust will supply Electricians to work on the Oakland Army Base, several hospitals under construction (Kaiser Hospital in Pleasanton and Alta Bates), Work is continuing on the BART extension from Fremont to Warm Springs, and on school projects at the various Alameda County school districts, at the University of California Berkeley campus, and the Port of Oakland. In addition, there are numerous commercial new construction and retrofit projects.

The Alameda Electrical Trust is requesting funding for Apprentice and Journeyman training. Apprentices will receive training on the Related and Supplemental Instruction (RSI) curriculum which is required to become journeymen electricians. Training for Journeymen will expand green training topics that will meet new state energy efficiency goals and employer-driven certification classes. With this additional ETP funding, the Trust will be able to train more Journeymen to meet employer demand.

The Trust is returning to the Panel for funding at this time because all training has been delivered under its most recent Agreement. Employer demand for Apprentices remains high, and in response, the Trust continues to expand the number of Apprentices it trains. In 2016, the Trust graduated 36 apprentices, and plans to graduate 47 in 2017. This is the first time Veterans have been included as a discrete cohort of Apprentice trainees.

Apprenticeship Pilot

Apprentice training may not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). As such, ETP funding supplements the cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case, the program is five years.

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

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by
$5, reducing the priority industry rate from $18 to $13 per hour. In addition, the Panel adopted a
“blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of
contractors over the two-year term of contract ranging from large employers to small (<100
employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and
Small Business rate ($26).

The ETP wage for Apprentices is no less than $22.04 per hour. However, the actual wages paid
are shown in the Training Plan Table and contract when they exceed $22.04, for both Apprentices
and Journeymen.

PROJECT DETAILS

Training Plan

All class/lab training is center-based and delivered at the Trust’s training center in San Leandro.
All trainers are former or current members of the trade and subject matter experts. All instructors
meet standards set by the LEA.

Journeyman Training

Commercial Skills (80%): Journeyman training will bring skills and knowledge up-to-date. ETP
funds will help to expand the Journeyman upgrade program, including the addition of green
training topics that will help the employers meet new state energy efficiency goals and employer-
driven certification classes, such as passing Green audits, NFPA-70 E (National Fire Protection
Association), Arc Flash and Building Automation Lighting and Plug Load Systems.

The Trust is constantly refining and adding to its curriculum to meet changing technology and
modernization occurring in the electrical industry. One example is a new class in Micro-
Grid/Energy Storage. This class will teach electricians how to work with batteries used to store
solar power. Battery plants will be built next to solar energy sources so that the storage of solar
power created during the day can be used at night.

Business Skills (5%): Training will enable Electricians to use more collaborative bidding and
project development practices; meet budgets; interact with other types of construction workers
and implement green solutions in traditional work environments. Further, training will give trainees
the latest tools to plan, organize and manage their construction projects so that they can complete
projects efficiently and on time. Training will also include team-building and leadership.

Computer Skills (5%): Training will include scheduling, planning and modeling software.
AutoCAD and Job Tracking applications will provide trainees with the tools to modify blueprints,
look up project requirements, build budgets and timelines, design virtual buildings, and adjust
computerized control systems.

OSHA 10/30 (10%): This training is not required as a condition of doing business in California.
However, the coursework must be approved by, and the instructors must be certified by Cal-
OSHA. The vendor must also have a certified instructor present to confirm attendance.
Completion of the training results in a certificate that expands employment opportunities.
ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10 or 30-hour course.

**Apprenticeship Training**

**Commercial Skills (90%)**: Apprentice Electricians work directly under the supervision of a qualified Journeyman Electrician to install or maintain a variety of approved wiring methods for distribution of electrical light, heat, power, radio and signaling utilization systems in existing or new buildings; including street and highway lighting, traffic signal and other outdoor above and below grade installations. Apprentices must learn to install, maintain, and repair various types of electrical and electronic equipment in commercial, industrial and residential establishments. Training will also include how to install, connect and test: electrical wiring systems for lighting, heating, air conditioning and communications in any building or structure.

**OSHA 10 (10%)**: This training provides an overview of occupational safety and health so that apprentices are more knowledgeable about workplace hazards and stringent safety standards in the electrical industry.

**Certified Safety Training**

**OSHA 10/30**: This training is not required as a condition of doing business in California. However, the coursework must be approved by, and the instructors must be certified by Cal-OSHA. Completion of the training results in a certificate that expands employment opportunities. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour or 30-hour course. OSHA 10/30 is not included in the 10% limitation on safety training nor in the 50% limitation on CBT.

Journeymen and Apprentice Electricians and related occupations may work under extremely dangerous conditions and on tight timelines. Thus, there is the potential for injury to themselves and other people in the work area vicinity. Participating employers and property owners may need trainees to undergo additional training to ensure that they can perform their work safely.

**Veteran Apprentices**

The Veteran training curriculum will be the same as Apprentice training outlined above. The Trust is committed to supporting job-related training that helps Veterans transition into California’s workforce. It recruits Veterans in cooperation with Helmets to Hardhats, [http://www.helmetstohardhats.org](http://www.helmetstohardhats.org), a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades. Veterans who apply for an apprenticeship at the Alameda Electrical Trust can skip the first stage of the application process (the written assessment) and go directly to the second stage (the interview).

**Curriculum Development**

Alameda Electrical Trust uses the National Joint Apprenticeship and Training Committee’s Curriculum for its apprenticeship program, which was developed for the exclusive use of IBEW-NECA JATC’S. The Journeymen curriculum meets the needs of the participating employers because it is employer-driven and based on feedback directly from employers. In addition, the curriculum is reviewed by union representatives of the JATC, and revisions and updates are made based on workplace performance, requests of customers, the needs of the local electrical industry, as well as course evaluations completed by all trainees.
Commitment to Training

Signatory employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. General safety training is, and will continue to be, provided by participating employers in accordance with all pertinent requirements under state and federal law.

Marketing and Support Costs

Alameda Electrical Trust requests, and staff recommends, 8% in support costs to fund its staff for recruiting and qualifying additional participating employers for this program. There are five staff people assisting with the Trust’s marketing and recruitment efforts. These efforts include direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and the web. Apprenticeship application announcements are disseminated to local, state and federal agencies as well as to local high schools, community colleges, and community-based organizations. Staff also participates in local job fairs.

While many participating employers have already been recruited, additional recruitment and assessment activities with employers must occur to support apprenticeship and journeymen training. The Trust agrees to cover any additional costs which exceed the ETP support costs.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by the Alameda Electrical Trust under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0908</td>
<td>$492,740</td>
<td>9/8/2015-9/7/2017</td>
<td>213</td>
<td>80</td>
<td>0</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 25,785 reimbursable hours has been tracked as of December 7, 2016 sufficient to support earnings of $337,013 (75%). The Contractor projects final earnings of 100%. Training will be completed by the January 2017 Panel meeting, and invoices will have been submitted resulting in retentions.

PRIOR PROJECTS

The following table summarizes performance by the Alameda Electrical Trust under ETP Agreements completed within the last five years:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>Payment Earned %</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0914</td>
<td>San Leandro</td>
<td>10/22/2012-10/21/2014</td>
<td>$354,796</td>
<td>$320,451</td>
<td>90%</td>
</tr>
</tbody>
</table>
**DEVELOPMENT SERVICES**

California Labor Federation in Sacramento and Strategy Workplace Communications in Oakland assisted with development at no cost.

**ADMINISTRATIVE SERVICES**

Strategy Workplace Communications will also perform administrative services for an amount not to exceed 13% of payment earned.

**TRAINING VENDORS**

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200 (Job Number 1)

JOURNEYMAN

COMMERCIAL SKILLS

- Codeology
  - National Electrical Code
  - Other Recognized Standards (Installation Changes)
  - Plan, Build and Use
  - Related Standards (Mandatory and Permissive Rules)
  - Special Occupancies and Equipment
  - Arc Flash

- Analog/Digital Circuit Principles
  - Math for Electricians
  - Ohm's Law
  - Generators
  - Inductance/Reactance
  - Series/Parallel Circuits

- Grounding
  - Grounding and Bounding
  - National Electrical Code Article 100-Definitions and Provisions
  - National Electrical Code Article 110-Requirements
  - National Electrical Code Article 90-Introduction
  - National Electrical Code Article Chapters 1-4
  - Significant Changes to National Electric Code

- Fire Alarm Systems and Installations
  - Definitions and Systems
  - Initiating Devices and Notification Systems
  - National Electrical Code and Installation Requirements
  - Start Up and Check Out Procedures
  - National Fire Protection Act, 1972 (NFPA 72)

- Fire Life Safety
  - National Electrical Code (Relating to Fire Alarms)
  - National Electrical Code Article 725
  - National Electrical Code Article 760
  - NFPA 72
  - Principles of Electronics

- Industrial Motor Control
  - Control Relays and Timers
  - Jogging and Plugging Controls
  - Manual Starters and Magnetic Coils
  - Push Buttons, Selector Switches and Mechanical Devices
  - Solid State Electronic Devices
  - Variable Frequency Drives
Programmable Logic Control
- Developing Ladder Programming
- Introduction to Programmable Equipment
- Programming Programmable Logic Controllers
- Using Timers and Counters in Logic Programs
- Writing a Program

Electrical Design
- 3 and 4-Way Switching
- Design of Electrical Circuits
- Magnetic Motor Control and the Code
- LonWorks and Building Automation
- Transformers and the Code

Voice, Data and Video
- Audio Distribution
- CCTV Security Surveillance
- Computer Networking
- Fiber Optics
- Telephonic Interconnect

Industry Specific Skills
- Solar Panel Installation
- Solar Photovoltaics
- Building Automation Systems
- Confined Space Entry
- Specialized Tools
- Conduit Bending
- Rigging and Lifting
- Firestop Installation
- Blueprints and Schematics
- Work Flow and Resources
- Proper Installation and Use of Testing & Auditing Materials & Equipment (Green Training)
- Understanding New Technologies & Changes to Industry Standards (Green Training)
- Proper Equipment Set-Up (Green Training)
- Safe Working
- Advanced Instrumentation and Motor Controls
- Programmable Logic Controllers
- Advanced Welding
- Architecture Designs and Advanced Plan Reading
- Management and Monitoring of Materials
- Testing Materials and Equipment – Proper Set-Up & Use (Green Training)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- Micro-Grid/Energy Storage
California Advanced Lighting Control Program (CALCP)
- Advanced Lighting Control Systems
- Lighting Control Strategies
- Line Voltage Switching Controls
- Low Voltage Switching Control
- Dimming Controls
- Occupancy Sensors
- Photosensors

CALCTP Acceptance Testing
- Electric Vehicle Infrastructure Training Program

BUSINESS SKILLS
- Teambuilding Skills
- Green Awareness Training & Green Certifications
- Leadership Skills
- Customer Service Skills
- Conflict Resolution
- Problem Solving
- Decision Making Skills
- Inventory Checklist
- Advanced Time Management
- Filling Out Work Documents & Reports Accurately
- Project Management
- Creating Project Bids

COMPUTER SKILLS
- Auto Computer-Aided Design
- Job Tracking System
- Scheduling & Planning Jobs

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)
- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)

APPRENTICE

Class/Lab Hours
8-210 (Job Numbers 2 & 3)

COMMERCIAL SKILLS

2nd Year
- Orientation, Level I
- Test Instruments, Level I
- Codeology, Level I
- AC Theory, Level I
- Blueprints, Level I
- Electrical Safety-Related Work Practices, Level I
- Transformers, Level I
- Application #5: Conduit Bending
- Application #6: Conduit Bending
- Application #7: Comb. Circuit Wiring
- Application #8: Transformer Connections
3rd Year
- AC Theory
- Blueprints
- Code and Practices
- Electrical Safety-Related Work Practices
- Fire Alarm Systems
- Grounding and Bonding
- Transformers
- Conduit Bending: Rigid & EMT, Chicago & 555
- Lighting Control Panels
- Motor Controls: Relays & Start/Stop
- Cad-Welding
- Ground Testing
- Transformer Wiring
- CPR/First Aid Refresher
- COMET

4th Year
- Code Calculations
- Blueprints & Layout Yard
- Grounding and Bonding
- Motors
- Motor Control
- Lightning Protection
- Lighting Essentials
- Field Trip to Motor Repair Shop & Folsom Power House
- Motor Controls: Mag Starter & 3-Wire Control
- PLC’s
- VFD’s
- Motor Control Labs
- Code Prep

5th Year
- Code and Practices
- Code Calculations
- Motor Control
- Orientation
- Rigging
- Torque
- PV/Solar Installer
- CALCTP
- EVITP
- CPR/First Aid Refresher
- Foreman Training: Managing the Work including NECA/IBEW Presentations

OSHA 10 (OSHA CERTIFIED INSTRUCTOR)
- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)
Safety training cannot exceed 10% of total training hours for any individual trainee. This 10% safety training cap does not apply to OSHA 10/30 training.

Note: Reimbursement for Job Number 1 Journeymen retraining is capped at 200 total training hours per trainee regardless of the method of training delivery. Reimbursement for Job Numbers 2 and 3 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA10/30 for a total of 210 hours regardless of the method of training delivery.
Training Proposal for:
Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund
Agreement Number: ET17-0926

Panel Meeting of: February 23, 2017

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

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees Priority Rate Apprenticeship</th>
<th>Industry Sector:</th>
<th>Construction Green Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Alameda, Contra Costa, Lake, Marin, Mendocino, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma</td>
<td>Repeat Contractor:</td>
<td>Yes  No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>Yes  No United Union of Roofers, Waterproofers, and Allied Workers Locals 40, 81 and 95</td>
<td>Turnover Rate:</td>
<td>≤20%</td>
</tr>
<tr>
<td></td>
<td>Managers/Supervisors: (% of total trainees)</td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>= Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$419,850</td>
<td>$29,025 8%</td>
<td>$448,875</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraining Apprentice</td>
<td>Commercial Skills, Computer Skills, OSHA10/30</td>
<td>225</td>
<td>8-210</td>
<td>0</td>
<td>$1,807</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 130</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Priority Rate Journeyman</td>
<td>Commercial Skills, Computer Skills, OSHA10/30</td>
<td>75</td>
<td>8-200</td>
<td>0</td>
<td>$564</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 24</td>
<td></td>
</tr>
</tbody>
</table>

Minimum Wage by County: Job Numbers 1-2 (Statewide/Priority Industry): $22.04 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 $5.52 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprentice Roofer</td>
<td></td>
<td>225</td>
</tr>
<tr>
<td>Journeyman Roofer</td>
<td></td>
<td>75</td>
</tr>
</tbody>
</table>

*The wage range for Journeymen is due to cost-of-living adjustment by geographic region and varying local unions.

INTRODUCTION

The Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund (Bay Area Roofers) (http://rwprogram.com) is a joint trust serving three apprenticeship programs. It is funded through collective bargaining between signatory employers with the Associated Roofing Contractors of the Bay Area Counties, Inc., and three union locals of the United Union of Roofers, Waterproofers, and Allied Workers:

- Local 40 West Bay Counties
- Local 81 East Bay & North Bay Counties
- Local 95 Santa Clara Counties

Each union local has its own collective bargaining agreement and its own Joint Apprenticeship Training Committee (JATC). Each JATC sponsors an apprenticeship program approved by the Division of Apprenticeship Standards (DAS). Each program uses the same curriculum for training as Roofers and Waterproofers (Roofers).

However, training is delivered through a joint JATC that was established in 1960: Bay Area Roofing and Waterproofing Industry Joint Apprenticeship Training Committee (Bay Area Roofers JATC). This will be the Panel’s fourth Agreement with this joint JATC.
The Bay Area Roofers JATC is responsible for training approximately 616 Apprentices and 1,327 Journeymen in 14 Northern California Counties. Under its apprenticeship curriculum, each apprentice receives at least 304 hours in Related & Supplemental Instruction (RSI) and 4,000 hours in on-the-job training over a 3.5 year apprenticeship.

The JATC is returning to the Panel for funding at this time because all training has been delivered under its most recent Agreement, and there exists continued employer demand for qualified Apprentices and Journeymen Roofers in Northern California.

**Employer Demand for Training**

All training funded by ETP is designed to meet changing customer demands in the industry, as it moves away from traditional hot tar roofing systems. Today’s roofing systems include a variety of single ply systems and modified roofing systems (mopping, torching, primed, adhesives, hot rubber, and peel-n-stick). There are new waterproofing systems, photovoltaic systems, vegetative roofs, and rainwater harvesting system. These new products and green building systems require skills training on new materials, processes, and new equipment such as electronic leak/failure detection. Thus, there are increasing demands for advanced math skills due to energy efficiency calculations and other new system assessments.

Green roofs are not easily replaced once installed, which requires enhanced failure detection devices. They also require alternative maintenance procedures that will not disrupt the green function of the roofing system, and pose safety hazards not found on conventional roofs. This training will address all of these changes.

In addition, employers are requiring training and certifications for Apprentice and Journeyman workers to insure safety and productivity. Certifications include OSHA 10/30, fall prevention, scaffold safety, torch application, rigging and signaling, handling hazardous materials, traffic flagging, and specialized training for manufacturing facility construction.

Finally, demand in the San Francisco Bay Area for roofers is strong. After the long recession, employment is at 100%. Every Apprentice needs to be ready to work immediately at high levels of productivity, and the JATC plans to bring more people into its apprenticeship program.

**Apprenticeship Pilot**

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the DAS. ETP funding is designed to supplement cost of delivery for the RSI portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case, the program is 3.5 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 $18 to $13 per hour. In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (<100 employees).
employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26).

The ETP wage for Apprentices is no less than $22.04 per hour, tracking the 2017 Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $22.04, for both Apprentices and Journeymen.

**PROJECT DETAILS**

The JATC operates a training facility in Livermore. This facility is a 9,600 square-foot building constructed with additional contributions by signatory employers. The facility enables delivery of RSI in a simulated laboratory environment. The expanded facility also allows instructors to use actual roofing materials and a multitude of new systems used in the construction industry.

The simulated laboratory environment is being used to deliver 60% of training for second-year Apprentices and 90% of training for third-year Apprentices. Bay Area Roofers JATC has also transitioned from after-work and weekend sessions to weeklong blocks of training, which has proven to be a more effective method for the roofing trades. Training will be delivered by qualified instructors and experienced Journeyman workers in the trade.

**Training Plan**

**Apprentice Training**

**Commercial Skills** (85%): Apprentices will receive training in commonly used materials in the industry, built-up roofing, waterproofing and damp proofing, cold applied roofing and caulkining, rigid roofing, asphalt and wood shingles, roofing plans and specifications, single-ply systems, metal roofing, maintenance and repair, green roofs, rain water harvesting, and solar systems.

**Computer Skills** (5%): Training for apprentices also covers construction-related modeling, planning, and 3-D software applications.

**OSHA 10/30** (10%): This training provides a complete overview of occupational safety and health so that apprentices become more knowledgeable about workplace hazards which are significant within the roofing and waterproofing industry.

**Journeyman Training**

**Commercial Skills** (85%): Journeymen will receive training in products and materials that are new to the industry such as advanced use of single-ply materials and systems, advanced waterproofing systems, complex maintenance and repair procedures, installation and maintenance of drainage systems, application of Title 24 standards, and special safety procedures for working around photovoltaic and other “green” roofs.

**Computer Skills** (5%): Journeymen will learn project management and computer skills, including building information modeling, estimating, and product application and testing.

**OSHA 10/30 Skills** (10%): Journeymen Roofers may work under hazardous conditions and on tight timelines. Thus, there is the potential for injury to themselves and other people in the work area vicinity. Participating employers and property owners may need Journeymen to undergo additional training to ensure that they can perform their work safely.
Certified Safety Training

OSHA 10/30: Training is a series of courses “bundled” by industry sector and occupation. This training is not required as a condition of doing business in California. However, the coursework must be approved by, and the instructors must be certified by Cal-OSHA. When delivery is by CBT all training hours must be delivered in a classroom over a finite amount of time, and the vendor must have a certified instructor present to confirm attendance.

Completion of the training results in a certificate that expands employment opportunities. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour or 30-hour course. OSHA 10/30 is not included in the 10% limitation on safety training nor in the 50% limitation on CBT.

Curriculum Development

Bay Area Roofers works directly with union and management to update RSI for Apprentices, and to offer upgrade training for Journeymen. The training curricula are developed by the roofing industry with national and local input. Updates to the RSI curriculum are reviewed and approved by DAS as necessary.

The JATC also conducts assessments and solicits trainee feedback at the conclusion of each course. Trainees are encouraged to report to the training center on their success in using skills to obtain work. Signatory employers may also provide feedback on the need for new training and the effectiveness of current course offerings.

Marketing and Support Costs

Associated Roofing Contractors of the Bay Area Counties represents employers in this project. Employers are notified of training through the association web site, mailings, and presentations. Employers participate as members of the joint committee that operates the program, and training is designed around their needs and the general needs of the industry. Marketing also includes emails to employers, local unions and roofing material representatives.

Bay Area Roofers JATC requests, and staff recommends, 8% support costs to assist in Apprentice and Journeymen recruitment, employer outreach, and assessment of employer-specific job requirements. These activities will take place throughout the Agreement.

Electronic Record Keeping

Staff has approved the Bay Area Roofers use of a Learning Management System for recordkeeping.

Commitment to Training

Employers will continue to make contributions to the JATC training trust for every hour worked by Apprentices and Journeymen.

General safety training is provided by the signatory employers in accordance with all pertinent requirements under state and federal law.

RECOMMENDATION

Staff recommends approval of this proposal.
ACTIVE PROJECTS

The following table summarizes performance by the Bay Area Roofers under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0904</td>
<td>$299,250</td>
<td>9/28/2015-9/27/2017</td>
<td>200</td>
<td>300</td>
<td>0</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 18,966 reimbursable hours have been tracked to support earnings of $296,038 (99%). The Contractor projects final earnings of 100%.

PRIOR PROJECTS

The following table summarizes performance by the Bay Area Roofers under an ETP Agreement completed within the last five years:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET12-0349</td>
<td>Livermore</td>
<td>6/30/2012-6/29/2014</td>
<td>$482,120</td>
<td>$232,809</td>
<td>(48%)</td>
</tr>
</tbody>
</table>

ET12-0349: Performance did not meet expectations for two reasons: 1) The term of contract coincided with changes in delivery methods and procedures at the training center in Livermore; and 2) At the time, work availability in the Bay Area did not pick up as quickly as expected. Roofing takes place at the end of construction so on-the-job hours lagged behind the other building trades. Thus, lower retention prevented the JATC from earning the full Agreement amount. Members are now experiencing full employment.

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development of this proposal for a flat fee of $10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories will also perform administrative services for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Apprentice

Class/Lab Hours
8 - 210 (Job 1)

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Asphalt and wood shingles
- Batten seam roofing
- Bermuda and shingle panel
- Blueprint reading
- Built-up roofing materials
- Cold applied roofing and caulking
- Common roofing materials
- Ethylene propylene diene monomer single ply roofing
- Flashing materials
- Flat seam rooming
- Following plans and specifications
- Following project plans
- Green roofs
- Hot air welding for apprentices
- Insulation materials
- Low slope roofing
- Maintenance and repair
- Measurement and calculation problems in roofing
- Metal roofing
- Mopping operations
- Regulations governing roofing and waterproofing
- Rigging and hoisting
- Roof pumps and tankers
- Roof surfacing and sealing
- Roofing tools
- Safe working procedures for roofers and use of safety equipment
- Single ply roofing
- Single ply roofing materials
- Single ply roofing systems
- Solar systems
- Specialty tile
- Standing seam roofing
- Steep slope roofing
- Types of rigid roofing
- Ventilation
- Waterproofing and below grade materials
- Waterproofing and damp proofing
- Working with concrete and mission tile
COMPUTER SKILLS

- Computer operations for construction
- Construction modeling

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)

Journeymen

**Class/Lab Hours**

8-200 (Job 2)

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Advanced concepts in waterproofing and damp proofing
- Advanced hot air welding
- Advanced maintenance and repair techniques
- Advanced single ply roofing
- Advanced systems of built-up roofing
- Air barriers for ventilation and heat escape
- Chemical usage
- Coordinating plans and schedules with other building trades
- Creating project plans
- Creating safe working conditions
- Designing rigging and hoisting systems and procedures
- Drainage systems including rain water recovery systems
- Electronic leak/failure detection
- Foreman skills, including creating and implementing project plans
- Green roof specific safety issues
- Handling pressurized equipment
- Project management systems
- Rigid roofing
- Roofing materials
- Single ply products and uses: advanced course
- Title 24 energy standards for roofing
- Torch-on product
- Vegetative roofs
- Water proofing on vertical surfaces
- Wind uplift and load issues related to green roofing
- Working around hazardous materials
- Working on scaffolding
- Working with photovoltaic material

COMPUTER SKILLS

- Advanced use of computers in construction
- Building Information Modeling software
- Computer skills related to product application and testing
Estimating systems
Project management software

**OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)**
- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)

Safety training cannot exceed 10% of total training hours for any individual trainee. This 10% safety training cap does not apply to Hazardous Materials or OSHA 10/30 training.

Note: Reimbursement for Job Number 1 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA10/30 for a total of 210 hours regardless of the method of training delivery. Reimbursement for Job Number 2 Journeymen retraining is capped at 200 total training hours per trainee regardless of the method of training delivery.
Training Proposal for:

City and County of San Francisco

Agreement Number: ET17-0923

Panel Meeting of: February 23, 2017

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

**PROJECT PROFILE**

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple Barriers New-Hire SET</td>
<td>Priority Industry:</td>
<td>Yes No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>San Francisco</td>
<td>Yes No</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes No</td>
<td>United Brotherhood of Carpenters and Joiners of America Local 22, Plasterers’ and Cement Masons’ Local 300</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers/Supervisors: (% of total trainees)</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**FUNDING DETAIL**

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$483,600</td>
<td>$30,876 8%</td>
<td>$514,476</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 50% of Total ETP Funding Required  N/A
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>New Hire</td>
<td>Commercial Skills</td>
<td>93</td>
<td>8-260</td>
<td>$5,532</td>
<td>*$14.69</td>
</tr>
</tbody>
</table>

**Minimum Wage by County** The New Hire minimum wage for San Francisco County is $14.69.

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

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

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Apprentice: Carpenter</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Laborer</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Iron Worker</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Painter</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Drywall Installer</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Roofer</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Tile Setter</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Tile Finisher</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Taper</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Glazer</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

The City and County of San Francisco (City of SF) is a joint powers entity governed by the City Mayor and County Board of Supervisors. The City of SF’s Office of Economic and Workforce Development (OEWD) operates Workforce Innovation and Opportunity Act (WIOA) programs in San Francisco. OEWD also supports Workforce Investment San Francisco, a Workforce Investment Board (WIB). This will be the fourth Agreement between ETP and City of SF.

This proposal will fund classroom/laboratory training at CityBuild Academy (http://oewd.org/city-build) a program created by OEWD in partnership with construction trade unions, the City College of San Francisco, the San Francisco Construction Trades Council, and community
based organizations. It is a pre-apprenticeship program designed to assist unions and private construction contractors (participating employers) in meeting their workforce needs. The program also assists private sector employers to meet city-mandated hiring requirements for large public and private construction projects.

CityBuild Academy is not limited to one apprenticeship program and is not administered by a Joint Apprenticeship Training Committee (JATC). Rather, the academy acts as a “pre-apprentice farm team” for numerous programs administered by a variety of JATCs throughout the Bay Area. As such, this proposal will not be funded under the Apprenticeship Pilot.

Training is conducted at the Evans Campus of the City College of San Francisco utilizing instructors who are themselves members of trades unions. Community-based organizations are contracted to provide comprehensive care management to participants, while the OEWD coordinates the program and facilitates job placement.

It is anticipated that trainees will complete retention after they have been accepted into an apprenticeship program for construction work in or near in San Francisco.

**Employer Demand**

The City of San Francisco “First Source” ordinance (Chapter 83, City Administrative Code, eff. 1998) establishes that entities that contract with public projects valued at more than $350,000 or require large-scale residential permits must make a good faith effort to hire from SF’s Workforce Development System. CityBuild Academy has been designated as the First Source referral entity that will assist employers in meeting this obligation.

According to City of SF, new construction is booming and demand is increasing for graduates of CityBuild Academy. City of SF estimates construction projects worth $11 billion in progress or starting in 2017. Large construction projects in San Francisco include the following:

- California Pacific Medical Center - $2 billion
- San Francisco International Airport Terminal 1 - $1.34 billion
- Presidio Parkway - $1.05 billion
- SF Muni Third St. Light Rail / Central Subway - $1.05 billion
- Park Tower - $690 million
- 181 Fremont - $640 million
- California Pacific Medical Center St. Luke’s Campus - $540 million
- The Exchange on Sixteenth - $450 million
- Salesforce Tower - $1.1 billion
- Moscone Center Expansion - $400 million
- Transbay Transit Center - $1.1 billion

Because of continued high demand for its program graduates, the City of SF is requesting funds for this new proposal. All training under its Active Agreement (ET16-0112) has been completed.

**Special Employment Training**

The Special Employment Training (SET) funding category is used when an employer does not face out-of-state competition, or when the trainees do not have a history of Unemployment Insurance (UI) payments. The trainees in this proposal will come from a hard-to-serve population that may have no previous reported payroll, and no history of UI. These trainees may have other “multiple barriers” to employment (e.g., limited reading/math skills, physical
disability). Multiple barrier trainees are eligible for a wage modification from the SET statewide wage to the county-by-county wage, as shown in the Training Plan Table.

PROJECT DETAILS

Training Plan

The City of SF will provide up to 260 hours of Commercial Skills training in classroom and laboratory instruction per trainee. Construction trade unions, apprenticeship committees, and building contractors (employers) helped develop the CityBuild Academy curriculum to provide trainees with a broad education in the trades. Training content is based on skills that these groups recommend to ensure success in extended apprenticeship programs. Training will cover the use of hand tools, power tools, job site safety, concrete, rebar, metal studs, layout, drywall, electrical systems, and interior finishes. Program graduates will be ready to compete for apprenticeships as a carpenter, laborer, iron worker, painter, drywall installer, roofer, tile setter, tile finisher, taper, and glazer.

Impact/Outcome

Successful graduates of CityBuild Academy may become registered apprentices. Trainees also earn up to 15 college credits for their CityBuild Academy training. Trainees may become eligible for other construction-related certifications, including Forklift Safety, Skid Steer, CPR, First Aid, Scissor Lift, Confined Space, Excavation Shoring Safety, Flagging/Traffic Control, and Scaffold Safety.

New Hire Recruitment Plan

Trainees will be recruited through the following community agencies:

- A. Philip Randolph Institute
- Anders and Anders Foundation
- Charity Cultural Services Center
- Mission Hiring Hall
- Young Community Developers

Trainees must meet the following criteria: San Francisco residency; high school diploma or GED; valid CA driver’s license, U.S. citizenship or proof of eligibility to work in the U.S., ability to pass drug tests; and ability to communicate effectively in English.

Marketing and Support Costs

The City of SF requests 8% in support costs to assist its staff in recruiting eligible trainees and qualifying participating employers for this program. Participating employers will be recruited from among companies that have been awarded construction contracts in San Francisco. While many participating employers have already been recruited, additional assessment activities with employers must occur to meet the specific job requests from employers sufficient to employ all successful trainees. Employers are contacted by CityBuild staff with the cooperation of City departments and building trade unions participating in this project. Employer needs for specific trainees are determined by individual job orders they place with CityBuild Academy. Using this system, all training is “to order” for specific employers. Staff recommends 8% support costs.
Funding from Other Sources

CityBuild Academy receives funds from the WIOA program and funds from the City and County of San Francisco. These funds may be used to pay for training costs that exceed the ETP reimbursement.

Tuition Reimbursement

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by City of SF under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0112</td>
<td>$514,476</td>
<td>08/03/15-08/02/17</td>
<td>93</td>
<td>100</td>
<td>32</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 30,596 reimbursable hours were tracked as of 2/1/17 for potential earnings of $650,988 (over 100% of approved amount). The Contractor projects final earnings of 100%.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0355</td>
<td>San Francisco</td>
<td>06/10/2013–06/09/2015</td>
<td>$387,240</td>
<td>$387,240</td>
<td>(100%)</td>
</tr>
<tr>
<td>ET11-0104</td>
<td>San Francisco</td>
<td>06/30/2011–06/29/2013</td>
<td>$387,240</td>
<td>$387,240</td>
<td>(100%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

City of SF retained Steve Duscha in Sacramento to assist with development of this proposal for a flat fee of $10,000.

ADMINISTRATIVE SERVICES

City of SF also retained Steve Duscha to perform administrative services for a fee not to exceed 12.5% of payment earned.
TRAINING VENDORS

The San Francisco City College in San Francisco has been retained to provide training for an amount to be determined.
**Exhibit B: Menu Curriculum**

**Class/Lab Hours**
8-260 (Job 1)

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- Ceiling Joists
- Communications
- Concrete
- Construction Math
- Doors
- Drywall
- Electrical
- Energy Efficiency
- Finish Work: Tile, Paint, Finish Carpentry
- Formwork
- Framing
- Green Building Processes and Systems
- Hand Tools
- Hazardous Materials
- Interior Finishes Rotations
- Layout
- Metal Studs
- Photovoltaic
- Power Tools
- Promoting Teamwork
- Rafters
- Rebar
- Rigging
- Roofing Materials
- Safety on a Job Site
- Scaffolding
- Windows

Note: Reimbursement for new hire training is capped at 260 total training hours per trainee.
Training Proposal for:
Fresno, Madera, Kings and Tulare Counties Electrical Industries Joint Apprenticeship and Training Committee

Agreement Number: ET17-0928

Panel Meeting of: February 23, 2017

ETP Regional Office: Sacramento

Analyst: D. Jordan

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprenticeship Retrainee</td>
<td>Construction</td>
</tr>
<tr>
<td>Priority Rate</td>
<td>Priority Industry:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresno, Madera, Kings, Tulare</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

International Brotherhood of Electrical Contractors Local 100

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>≤20%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors: (% of total trainees)</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
</tr>
</tbody>
</table>

### FUNDING DETAIL

\[
\text{Program Costs} + \text{Support Costs} = \text{Total ETP Funding}
\]

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$377,600</td>
<td>$26,100 8%</td>
<td>$403,700</td>
</tr>
</tbody>
</table>

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

Inherent
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Class / Lab</td>
<td>CBT</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Retrainee Priority Rate Journeyman</td>
<td>Business Skills, Comm'l Skills, Computer Skills, OSHA 10/30</td>
<td>75</td>
<td>8-200</td>
<td>0</td>
<td>$564</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 24</td>
<td></td>
<td>$36.25</td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Apprenticeship</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>125</td>
<td>8-210</td>
<td>0</td>
<td>$2,780</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 200</td>
<td></td>
<td>$22.04</td>
</tr>
<tr>
<td>3</td>
<td>Retrainee Apprenticeship Veterans</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>5</td>
<td>8-210</td>
<td>0</td>
<td>$2,780</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 200</td>
<td></td>
<td>$22.04</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** Job Numbers 1-3 (SET/Priority Industry): $22.04.

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

**Used to meet the Post-Retention Wage?** ☑ Yes ☐ No ☐ Maybe

Up to $2.10 per hour may be used to meet the Post-Retention Wage in Job Numbers 2 & 3.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Number 1 Journeyman Inside Wireman (Electrician)</td>
<td>75</td>
<td></td>
</tr>
<tr>
<td>Job Number 2 Apprentice Inside Wireman (Electrician)</td>
<td>125</td>
<td></td>
</tr>
<tr>
<td>Job Number 3 Veteran Apprentice Inside Wireman (Electrician)</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Fresno, Madera, Kings & Tulare Counties Electrical Industries Joint Apprenticeship and Training Committee (Fresno Electrical JATC) ([http://www.fresnojatc.org/](http://www.fresnojatc.org/)) provides up-to-date skills training and secures high-quality job opportunities for its members. The Fresno Electrical JATC is governed by a Board of Trustees comprised of labor and management representatives, and is a joint effort of the International Brotherhood of Electrical Workers (IBEW) Local 100 and the
National Electrical Contractors Association. All trainees are members of IBEW Local 100 located in Fresno, Madera, Kings and Tulare Counties (Region).

**PROJECT DETAILS**

**Need For Training**

Fresno Electrical JATC trains Electricians who install power, lighting, sound, communications, and other electrical equipment in commercial, industrial and residential buildings. This proposal will help fund both Journeyman and Apprentice Electrician training. The Journeyman program is designed to bring worker skills up-to-date as required by California Code of Regulations, Title 24, (California Building Standards) and is governed by the California Building Standards Commission.

The construction industry is undergoing significant changes as it shifts to “green” building. Building green comes with higher quality standards, increased material cost, and more advanced technology. Experienced Journeymen require training to utilize new products, reduce waste and improve efficient working standards. The demand for energy efficient construction has increased significantly and is the future of the industry.

The Apprentice training will prepare trainees with the skills to replace retiring Journeyman Electricians and accommodate the increased need for Electricians in the Region. Through direct engagement of the unionized employers, the apprenticeship program is uniquely designed to place its graduates directly into “learn-while-you-earn” apprenticeships that provide a quality wage and entry into a rigorous trade education leading to a lifelong career within the local community. This is the first time Veterans have been introduced as a distinct cohort of Apprentice trainees.

**Employer Demand**

Currently, there are several work projects in the Region that will require Electrician Apprentices and Journeymen.

- Fresno Community Hospital Bed Tower
- City of Fresno Water Treatment Plant
- High Speed Rail Projects, Traffic Signals
- Various Utility Solar Projects
- Carport Solar at Various School Sites

Training is required to be employed on these public and private works projects. Without the proposed training, Fresno Electrical JATC will not be able to help its employers meet the quickly changing needs of the highly competitive construction industry.

**Apprenticeship Program**

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the 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 $18 to $13 per hour. In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (<100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26).

The ETP wage for Apprentices is no less than $22.04 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $22.04, for both Apprentices and Journeymen.

**PROJECT DETAILS**

Fresno Electrical JATC, with input from both labor and management representatives, has customized national electrical curriculum to address the local needs of its members, participating employers and the industry. The union was directly involved in the development of this curriculum and training plan and is in full support of the training for its members.

Journeyman Inside Wireman (Job Number 1) will receive between 8-200 hours of class/lab training. Apprentices Inside Wireman (Job Numbers 2 & 3) will receive between 8-210 hours of class/lab training.

**Journeyman Training**

**Business Skills** (5%): Training will include new national building codes and green practices; following certification guidelines; using more collaborative bidding and project development practices; meeting budgets; interacting with other types of construction workers; and implementing green solutions in traditional work environments. Training will give workers the tools to plan, organize and manage their construction projects to complete efficiently and on time. Training will also include team-building and leadership skills.

**Commercial Skills** (80%): Training will focus on “Green” methods due to the demand for energy efficient construction methods and technologies by the participating employers and property owners. Training will cover energy-efficient technologies and products such as green building materials, solar photovoltaic panels, new motor controls, advanced welding, green materials testing and audit equipment.

**Computer Skills** (5%): Training will focus on software programs that include AutoCAD, Scheduling and Planning system and Job tracking. AutoCAD will give trainees the tools to read and modify blueprints while at a jobsite. Job planning software will help unionized trainees meet the challenges of staying competitive by give trainees skills to stay employed in a rapidly changing industry.

**OSHA Skills 10/30** (10%): 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.
Apprentice Training

Commercial Skills (90%): Apprentices will learn to install, maintain and repair various types of electrical and electronic equipment in commercial, industrial and residential establishments. They will also learn to install connect and test: electrical wiring systems for lighting, heating, air conditioning and sound and communications in any building or structure.

OSHA Skills 10/30 (10%): Apprentices work under extremely dangerous conditions which requires considerable physical effort on the part of the apprentice to do lifting, climbing, crouching, and working in cramped areas. There is potential for injury or death for themselves and other people in the work area vicinity. The participating employers and property owners need electricians to undergo additional training to ensure that their skills are up to date and that they can perform their work efficiently and safely.

Veterans Program

Fresno Electrical JATC has committed to training five Veterans (Job Number 3) at the regular apprenticeship rate without additional support costs above the 8%. [Note: All Apprentice reimbursement is at the $13 rate.]

The Veteran training curriculum will be the same as Apprentice training outlined above. There trainees are in a separate Job Number to better track performance toward the goal of improved outreach for Veterans.

Fresno Electrical JATC training programs are registered with Helmets to Hardhats, a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades.

Commitment to Training

More than 40 employers contribute to the JATC and all of the participating employers are subject to unemployment Insurance fund contributions. Each participating employer is bound by the collective bargaining agreement to contribute to the JATC fund and this contracted amount is not affected by the ETP funds being requested. Training will be delivered by former and current members of the trade and some who have received Master of Certification status by the National Joint Apprenticeship and Training Committee.

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.

Marketing and Support Costs

The Fresno Electrical JATC is requesting 8% support costs to assist in the recruitment, employer outreach, and assessment of employer-specific job requirements.

Marketing is done through direct mailings, informational flyers, personal contracts, telephone calls, public service announcements, emails, and Fresno Electrical JATC website. Class information will be disseminated throughout the year to all Apprentice and Journeyman Electricians within the jurisdiction as well as to the electrical contractors who employ them. Application announcements for the Apprentice program are sent to local, state, and federal agencies as well as to local high schools, community colleges and community-based organizations.
RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by Fresno Electrical JATC under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0917</td>
<td>$317,520</td>
<td>02/02/15 – 02/01/17</td>
<td>174</td>
<td>24</td>
<td>202</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 18,025 reimbursable hours have been tracked for potential earnings of $263,541.60 (83% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress.

DEVELOPMENT SERVICES

California Labor Federation in Sacramento and Strategy Workplace Communications in Oakland assisted with development at no cost.

ADMINISTRATIVE SERVICES

Strategy Workplace Communications in Oakland will also perform administrative services for an amount not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Journeyman Training

Class/Lab Hours
8 - 200 (Job 1)

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Codeology
  - National Electrical Code
  - Other Recognized Standards (Installation Changes)
  - Plan, Build and Use
  - Related Standards (Mandatory and Permissive Rules)
  - Special Occupancies and Equipment
  - Arc Flash

- Analog/Digital Circuit Principles
  - Math for Electricians
  - Ohm's Law
  - Generators
  - Inductance/Reactance
  - Series/Parallel Circuits

- Grounding
  - Grounding and Bounding
  - National Electrical Code Article 100-Definitions and Provisions
  - National Electrical Code Article 110-Requirements
  - National Electrical Code Article 90-Introduction
  - National Electrical Code Article Chapters 1-4
  - Significant Changes to National Electric Code

- Fire Alarm Systems and Installations
  - Definitions and Systems
  - Initiating Devices and Notification Systems
  - National Electrical Code and Installation Requirements
  - Start Up and Check Out Procedures
  - National Fire Protection Act, 1972 (NFPA 72)

- Fire Life Safety
  - National Electrical Code (Relating to Fire Alarms)
  - National Electrical Code Article 725
  - National Electrical Code Article 760
  - NFPA 72
  - Principles of Electronics

- Industrial Motor Control
  - Control Relays and Timers
  - Jogging and Plugging Controls
  - Manual Starters and Magnetic Coils
  - Push Buttons, Selector Switches, and Mechanical Devices
- Solid State Electronic Devices
- Variable Frequency Drives

- Programmable Logic Control
  - Developing Ladder Programming
  - Introduction to Programmable Equipment
  - Programming Programmable Logic Controllers
  - Using Timers and Counters in Logic Programs
  - Writing a Program

- Electrical Design
  - 3 and 4-Way Switching
  - Design of Electrical Circuits
  - Magnetic Motor Control and the Code
  - LonWorks and Building Automation
  - Transformers and the Code

- Voice, Data and Video
  - Audio Distribution
  - CCTV Security Surveillance
  - Computer Networking
  - Fiber Optics
  - Telephonic Interconnect

- Industry Specific Skills
  - Solar Panel Installation
  - Solar Photovoltaics
  - Building Automation Systems
  - Confined Space Entry
  - Specialized Tools
  - Conduit Bending
  - Rigging and Lifting
  - Firestop Installation
  - Blueprints and Schematics
  - Work Flow and Resources
  - Proper Installation & Use of Testing & Auditing Materials & Equipment (Green Training)
  - Understanding New Technologies & Changes to Industry Standards (Green Training)
  - Proper Equipment Set-Up (Green Training)
  - Safe Working Practices
  - Advanced Instrumentation and Motor Controls
  - Programmable Logic Controllers
  - Advanced Welding
  - Architecture Designs and Advanced Plan Reading
  - Management and Monitoring of Materials
  - Testing Materials and Equipment-Proper Set-Up and Use (Green Training)
  - Understanding Changes to Industry Standards (Green Training)

- California Advanced Lighting Control Program (CALCTP)
  - Advanced Lighting Control Systems
  - Lighting Control Strategies
• Line Voltage Switching Controls
• Low Voltage Switching Control
• Dimming Controls
• Occupancy Sensors
• Photosensors

➢ CALCTP Acceptance Testing
➢ Electric Vehicle Infrastructure Training Program
➢ Micro Grid Energy Storage

**BUSINESS SKILLS**
➢ Teambuilding Skills
➢ Green Awareness Training & Green Certifications
➢ Leadership Skills
➢ Customer Service Skills
➢ Conflict Resolution
➢ Problem Solving
➢ Decision Making Skills
➢ Inventory Checklist
➢ Advanced Time Management
➢ Filling Out Work Documents and Reports Accurately
➢ Project Management
➢ Creating Project Bids

**COMPUTER SKILLS**
➢ Auto Computer-Aided Design
➢ Job Tracking System
➢ Scheduling & Planning Jobs

**OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)**
➢ OSHA 10 (requires completion of 10 hours)
➢ OSHA 30 (requires completion of 30 hours)

**Class/Lab Hours**

| Apprentice Training | 8 - 210 (Jobs 2 & 3) |

**COMMERCIAL SKILLS**

**2nd Year**
➢ Orientation, Level II
➢ Test Instruments, Level I
➢ Codeology, Level I
➢ AC Theory, Level I
➢ Blueprints, Level I
➢ Electrical Safety-Related Work Practices, Level I
➢ Transformers, Level I
➢ Application #5: Conduit Bending
➢ Application #6: Conduit Bending
➢ Application #7: Comb. Circuit Wiring
➢ Application #8: Transformer Connections
3rd Year
- AC Theory
- Blueprints
- Code and Practices
- Electrical Safety-Related Work Practices
- Fire Alarm Systems
- Grounding and Bonding
- Transformers
- Conduit Bending: Rigid & EMT, Chicago & 555
- Lighting Control Panels
- Motor Controls: Relays & Start/Stop
- Cad-Welding
- Ground Testing
- Transformer Wiring
- CPR/First Aid Refresher
- COMET

4th Year
- Code Calculations
- Blueprints (& layout yard)
- Grounding and Bonding
- Motors
- Motor Control
- Lightning Protection
- Lighting Essentials
- Field Trip to Motor Repair Shop and Folsom Power House
- Motor Controls: Mag Starter & 3-Wire Control
- PLC's
- VFD's
- Motor Control Labs
- Code Prep

5th Year
- Code and Practices
- Code Calculations
- Motor Control
- Orientation
- Rigging
- Torque
- PV/Solar Installer
- CALCCTP
- EVITP
- CPR/First Aid Refresher
- Foreman Training: Managing the Work including NECA/IBEW Presentations

OSHA 10/30 (Certified OSHA Instructor)
- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)
Safety training cannot exceed 10% of total training hours for any individual trainee. This 10% safety training cap does not apply to Hazardous Materials or OSHA 10/30 training.

Note: Reimbursement for Job Number 1 training is capped at 200 total training hours per trainee. Reimbursement for Job Number 2 & 3 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA10 for a total of 210 hours.
Training Proposal for:

Northern California Valley Sheet Metal Industry Joint Apprenticeship Training Committee

Agreement Number: ET17-0927

Panel Meeting of: February 23, 2017

ETP Regional Office: Sacramento  Analyst: K. Mam

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraining</th>
<th>Apprenticeship</th>
<th>Veterans</th>
<th>Priority Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td>Construction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>Yes  No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Northern California</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repeat Contractor:</td>
<td>Yes  No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>Yes  No  Sheet Metal Workers Local Union No. 104</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>≤20%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors: (%) of total trainees</td>
<td>≤20%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL:

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$249,600</td>
<td>$17,280 8%</td>
<td>$266,880</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 50% of Total ETP Funding Required  Inherent
### Training Plan Table

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Apprentice</td>
<td>Commercial Skills, Computer Skills, OSHA 10</td>
<td>90</td>
<td>8-210</td>
<td>0</td>
<td>$2,780</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 200</td>
<td></td>
<td>$22.04</td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Apprentice Veterans</td>
<td>Commercial Skills, Computer Skills, OSHA 10</td>
<td>6</td>
<td>8-210</td>
<td>0</td>
<td>$2,780</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 200</td>
<td></td>
<td>$22.04</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** Statewide Average Wage (Priority Industry) $22.04  
**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 $6.73 per hour may be used to meet the Post-Retention Wage.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1 (Retrainees)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sheet Metal Worker Apprentice</td>
<td>67</td>
<td></td>
</tr>
<tr>
<td>Sheet Metal Service Technician Apprentice</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Sheet Metal and TAB Technician Apprentice</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2 (Veterans)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sheet Metal Worker Apprentice</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Sheet Metal Service Technician Apprentice</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Sheet Metal and TAB Technician Apprentice</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

### 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 and journeymen in the sheet metal, HVAC, and testing and air balance (TAB) industries under collective bargaining between representatives from Local 104. The JATC delivers training to 21 counties across Northern California. Training under this proposal will only be for Apprentices.
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, and welding certifications in all areas. Training will consist of hands-on instruction and lecture.

This is the second ETP Agreement between ETP and Norcal Sheet Metal JATC, and the second within the last five years. Training under the prior Agreement was for the Sacramento and Stockton regions. This Proposal expands upon the first, because it includes Apprentices in the Redding area. Also, this is the first time Veterans have been introduced as a distinct cohort of Apprentice trainees.

**Apprenticeship Program**

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the 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 $18 to $13 per hour. In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26).

The ETP wage for Apprentices is no less than $22.04 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $22.04, for Apprentices.

**PROJECT DETAILS**

The proposed training is entirely center-based. A new cohort of Apprentice trainees are scheduled to begin in March 2017. Currently 100% of apprentices are employed and as larger jobs ramp up, the JATC will need to train apprentices to fill the need of participating employers to have certified apprentices on all publicly funded job sites.

Training will expand apprentices’ skills in preparation for new projects. New projects include a new regional Kaiser Facility, a Sacramento Community Center project, new County courthouses, and the Yamanee Project which is a new high-rise condominium project in Sacramento. Training will also focus on certifying TAB Technician on building requirements to meet the states Title 24 requirements.
Training Plan

Commercial Skills (92%) Training will be offered to all occupations to include sheet metal fabrication such as ductwork and flashing along with service and TAB training. Training topics include Advanced Triangulation, Layout, and Fabrication of Complex Fittings, Study of Psychrometrics, and Duct Leakage Testing.

Computer Skills (3%) Training will be offered to all occupations. Training will provide apprentices with computer skills that are essential to their job duties. Training topics include BIM and CAD training.

Certified Safety Training (5%)

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.

Impact/Outcome

Certification for Apprentice training include OSHA10/30, Forklift: Warehouse, Rough Terrain Operation and Aerial, EPA Section 608 Certification Section I and II, TABB Certification Title 24 Mechanical Acceptance Technician, and State and National Journeyman statues and certification from American River Community College.

Marketing and Support Costs

All of the JATC’s current participating employers are signatory to Local 104. The union has recently stepped up their efforts and created a Division with a Director of Business Development and their goal is to organize and recruit more contractors to become signatory, providing more employment opportunities for apprentices. The JATC also utilize several avenues to market the program by attending career fairs, community based job fairs and educational outreach.

The 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.

Trainer Qualifications and Training Coordinator

All trainers receive instructor training through international training organizations and are approved by American River College. The JATC has 7 staff members facilitating the project and 2 staff members dedicated to marketing, recruitment, needs assessments and scheduling training.

Veterans Program

The Veteran training curriculum will be the same as Apprentice training outlined above. These trainees are in a separate Job Number to better track performance toward the goal of improved outreach for Veterans.
The JATC is 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 JATC also attends job fairs specifically targeting Veterans.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes performance by Norcal Sheet Metal JATC under an ETP Agreement that was completed within the last five years:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0917</td>
<td>Statewide</td>
<td>12/31/12 – 12/30/14</td>
<td>$299,740</td>
<td>$299,740</td>
<td>100%</td>
</tr>
</tbody>
</table>

**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
- Trigonometry
- Advanced Drafting Skills
- Layout and Fabrication of Fittings
- Welding Safety
- Welding Skills
- Confined Space Training
- Advanced Triangulation, Layout and Fabrication
- Architectural Sheet Metal
- Fire and Smoke Dampers
- Hoisting and Rigging
- Introduction to HVAC Equipment
- Air Properties
- Study of Psychrometrics
- Calculating Equipment Cooling Capacities and Enthalpy of Air
- Duct Design and Airflow Calculations
- Design, Fabrication and Installation of Duct Systems
- Understanding Blueprints and Job Specifications
- OSHA Regulations
- Field Measuring
- Standing Seam Roofs
- Central HVAC System Design
- Advanced Blueprint Reading
- Rooftop Steel Construction
- Rooftop Architectural Steel
- Electricity and HVAC Systems
- Calculating System and Operation Design, Fabricate and Test Lab Duct Systems
- Duct Leakage Testing
- HVAC Detail Drawings
- Duct Elevation Drawings
- HVAC Blueprint Takeoff for Bidding
- Complete Building Takeoff for Sheetmetal
- Testing, Adjusting and Balancing System
- Electrical Panel Safety
- Installation of Prefabricated Building Panels and Architectural Elements
- Food Service Stainless Fabrication and Sanitary Code Requirements
- Exhaust Hood and System Fabrication and Installlation
- HVAC Fan Laws and Principles
- Manometer, Pitot Tube and Tachometer Usage
- SMACNA Standards for Duct Construction
- Positive/Negative Pressure Blow Pipe Construction
**COMPUTER SKILLS**
- BIM (Building Information Modeling)
- CAD Training
- Advanced Computer Skills

**OSHA 10 (OSHA Certified Instructor)**
- OSHA 10 (requires completion of 10 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 210 total training hours per trainee, regardless of the method of delivery.
Panel Amendment #1 Proposal for: Procore Technologies, Inc.
Agreement Number: ET17-0213

Amendment Effective Date: October 16, 2016

Panel Meeting of: February 23, 2017

ETP Regional Office: North Hollywood
Analyst: M. Paccerelli

CURRENT PROJECT PROFILE

Contract Industry Type: Priority Sector(s): Technology/IT
Retrainee Services Job Creation Services

Counties Served: Santa Barbara, San Francisco, San Diego
Repeat Contractor: ☐ Yes ☒ No
Union(s): ☐ Yes ☒ No
Priority Industry: ☒ Yes ☐ No
Current Contract Term: August 17, 2016 to August 16, 2018
Substantial Contribution: ☐ Yes ☒ No

CURRENT FUNDING

| Current Funding | $99,960 |

AMENDMENT FUNDING

<table>
<thead>
<tr>
<th>Requested Funding</th>
<th>Total Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$+404,090</td>
<td>$504,050</td>
</tr>
</tbody>
</table>
### AMENDMENT TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Class / Lab</td>
<td>CBT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Priority Rate Retrainee</td>
<td>Business Skills; Computer Skills</td>
<td>255</td>
<td>8-200</td>
<td>0-36</td>
<td>$1,710</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>Weighted Avg:</td>
<td>95</td>
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<tr>
<td>2</td>
<td>Priority Rate Retrainee</td>
<td>Business Skills; Computer Skills</td>
<td>17</td>
<td>8-200</td>
<td>0-100</td>
<td>$4,000</td>
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<tr>
<td></td>
<td>Job Creation</td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg:</td>
<td>200</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** Job Number 1: $15.60 in Santa Barbara County; $17.02 in San Francisco County; and $16.46 in San Diego County

Job Number 2 (Job Creation): $12.77 for Santa Barbara County; $14.19 in San Francisco County; and $13.72 in San Diego County

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

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

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

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Title</th>
<th>Wage Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing Staff I</td>
<td></td>
</tr>
<tr>
<td>Marketing Staff II</td>
<td></td>
</tr>
<tr>
<td>Sales Staff I</td>
<td></td>
</tr>
<tr>
<td>Sales Staff II</td>
<td></td>
</tr>
<tr>
<td>Engineer I</td>
<td></td>
</tr>
<tr>
<td>Engineer II</td>
<td></td>
</tr>
<tr>
<td>Information Technology Staff I</td>
<td></td>
</tr>
<tr>
<td>Information Technology Staff II</td>
<td></td>
</tr>
<tr>
<td>Customer Success Staff I</td>
<td></td>
</tr>
<tr>
<td>Customer Success Staff II</td>
<td></td>
</tr>
<tr>
<td>Finance Staff I</td>
<td></td>
</tr>
<tr>
<td>Finance Staff II</td>
<td></td>
</tr>
<tr>
<td>Business System Analyst I</td>
<td></td>
</tr>
<tr>
<td>Business System Analyst II</td>
<td></td>
</tr>
<tr>
<td>Operation Staff I</td>
<td></td>
</tr>
<tr>
<td>Operation Staff II</td>
<td></td>
</tr>
<tr>
<td>Administration Staff I</td>
<td></td>
</tr>
<tr>
<td>Administration Staff II</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 2003, Procore Technologies, Inc. (Procore) is a construction management software company. With an award-winning suite of project management tools, Procore has over a million registered users across the globe managing all types of construction projects including industrial plants, office buildings, apartment complexes, university facilities, and retail centers.

Procore’s mission is to provide construction professionals with the most comprehensive and easy-to-use project management platform, combined with industry leading customer service. The Company helps users increase project efficiency and accountability by streamlining and mobilizing project communication and documentation. This real-time data and accessibility minimizes delays and increases profits.

AMENDMENT DETAILS

As a first-time ETP Contractor, Procore had an initial training demand consistent with this Amendment, but they submitted a conservative training plan for less than $100K in funding. This was to ensure that they were able to properly manage and implement the project. Less than five months into the Agreement, Procore completed 90% of the total training hours.

Procore is requesting to increase the weighted average to 95 hours in Job Number 1 and 200 hours in Job Number 2 per trainee. The additional hours will allow trainees to continue training that has already begun from the beginning of the contract. Many of the course topics in the curriculum had not been provided to some trainees or were provided to a select group of trainees and can now be extended to the other trainees. With a training period of 15 months remaining in the contract term and a high demand for training, Procore is confident that they can earn the full requested contract amount.

In summary:
- The funding amount will increase by $404,090 from $99,792 to $504,050.
- The weighted average hours in Job Number 1 will increase from 24 to 95.
- The weighted average hours in Job Number 2 will increase from 20 to 200.
- The average cost per trainee in Job Number 1 will increase from $360 to $1,710.
- The average cost per trainee in Job Number 2 will increase from $480 to $4,000.

The effective date of this Amendment will be October 16, 2016, which is when the request for the amendment was submitted to ETP.

RECOMMENDATION

Staff recommends approval of this Amendment.
**CURRENT CONTRACT PERFORMANCE**

The following table summarizes performance by Procore under the current ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees Enrolled</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET17-0213</td>
<td>$99,960</td>
<td>08/17/2016-08/16/2018</td>
<td>390</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

To date, 4,732 eligible training hours have been tracked (90% of the current Agreement amount).
Training Proposal for:
All FAB Precision Sheetmetal, Inc.

Small Business
ET17-0375

Approval Date: December 15, 2016
ETP Regional Office: San Francisco Bay Area Analyst: C. Hoover

CONTRACTOR

- Type of Industry: Manufacturing
- Services
- Priority Industry: Yes No
- Number of Full-Time Employees
  California: 90
  Worldwide: 90
  Number to be trained: 45
- Owner Yes No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 10%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: $62,010
- In-Kind Contribution: $47,700
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority Rate SB &lt;100</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mfg. Skills</td>
<td>45</td>
<td>8-60 0</td>
<td>$1,378</td>
<td>*$17.02</td>
</tr>
</tbody>
</table>

*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 SB Priority
- **County(ies):** Santa Clara
- **Occupations to be Trained:** ERP Planner/Estimator, Buyer, Document Controller, ISO Auditor, Engineer, Scheduler, Machine Operators/Leads, Account/Project Manager, QC Inspector, Shipping, Supervisors, Shop Manager
- **Union Representation:** ☐ Yes
  ☑ No
- **Health Benefits:** $2.50 per hour

SUBCONTRACTORS

- **Development Services:** Manex Consulting, San Ramon, is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000. In this proposal, the fee will be $6,201. This fee does not affect the approved amount of funding.
- **Administrative Services:** N/A
- **Training Vendors:** Amada America, Inc., Buena Park will provide Manufacturing Skills training.

The Corporation for Manufacturing Excellence, San Ramon, will provide ISO and 6 Sigma training (Continuous Improvement).

OVERVIEW

In operation since 1999, All FAB Precision Sheetmetal, Inc. (All FAB) (www.allfabprecision.com) is a family-owned and operated business. The Company manufactures, produces and services
contracted metal stamping and assembly manufacturing. As a full-service contract manufacturer, All FAB starts with raw material, stamps, forms, welds, sand blasts, paints and assembles cabinets and units for customers. While All FAB’s core function is to form sheets of metal into computer networking chassis and server mainframes equipped with built-in electronic components, the Company also offers a full set of options from design to prototyping through volume production. All FAB employs Solid Works and other 3D drawing programs. The Company has a “prototype” department for custom designs.

All FAB’s base product is enclosures for rack mounted control systems and other customer manufactured metal fabricated cabinets. The cabinets are used in the data-storage, medical, oil and gas, automotive, aerospace, computer and telecommunication industries. Even though All FAB has been very successful with one key account over the last several years, this has led to a very tenuous position for the Company with the one account being responsible for 95% of all its business. This major account spreads its orders amongst two other competitors. To gain more market share with this client and grow All FAB’s business, the Company must continue to reduce costs and improve its on-time delivery.

All FAB is ISO 9001:2008 certified, but the Company must upgrade to ISO 9001:2015 standards to stay competitive. New customers are demanding ISO 9001:2015 certification. All FAB’s five-year strategic plan is to diversify the Company’s business and expand its customer base. Becoming ISO 9001:2015 certified will move the Company in this direction.

The ETP-funded training will allow All FAB to upgrade worker skills. Many employee skills are outdated; therefore, the Company must train in welding, machine operation and blue print reading. In addition, All FAB must cross-train in manufacturing processes. Each of these processes is unique and requires different skills. Cross-training will allow All FAB to move employees throughout the organization and meet customer needs.

Training Plan

All FAB utilizes an Enterprise Resource Planning (ERP) system, Global Shop, which must be upgraded to provide better costing modules, order tracking and processing. In addition, the Company must train its internal ISO Auditor in new 2015 procedures, to implement companywide. All FAB will train via a train-the-trainer model to build its core group of trainers. Training will be delivered via class/lab by these in-house experts and vendors in the following:

**Business Skills:** Training will be offered to ERP Planner/Estimators, Buyers, Document Controller and Schedulers in Effective Quoting, Business Planning, and Advanced Planning and Scheduling. All FAB must upgrade the Company’s tools for quoting and scheduling to improve on-time delivery and to win more business. Training will work in tandem with ERP upgrades, to give better costing information.

**Computer Skills:** Training will be offered to all occupations. ERP training will be provided to ERP Planner/Estimator, Buyer, Document Controller, ISO Auditor, Engineer and Scheduler who will be the main user and implementer of the ERP upgrades. Pro Engineer Training will be provided to Engineers to reduce the Company’s quoting and design time. In addition, Microsoft Office, Windows OS Navigation and GSS Training - Visual Basic will be provided to all occupations to provide cross-training and familiarization.

**Continuous Improvement:** Training will be offered to the Document Controller, ISO Auditors, QC Inspectors, Shop Managers, Supervisors and Scheduling employees. All FAB is ISO 9001:2008 certified.
**Manufacturing Skills:** Training will be offered to ISO Auditor, Machine Operators/Leads, QC Inspector, Shipper, Supervisors and Shop Manager for a cross-trained team. The ISO Auditor will be part of this training so that procedures and documents will match ISO requirements. All FAB also needs to train Machine Operators in blue print reading and Shippers in customer-specific packaging requirements.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Effective Quoting
- Business Planning
- Advanced Planning and Scheduling

**COMPUTER SKILLS**
- Enterprise Resource Planning Training
- Pro Engineer Training
- Intermediate/Advanced Microsoft Office Suite (Excel, Word, Access, PowerPoint)
- Windows OS Navigation
- GSS Training- Visual Basic

**CONTINUOUS IMPROVEMENT**
- ISO (International Standards) Training

**MANUFACTURING SKILLS**
- Brake Press Operations – Amada
- Blue Print Reading
- Basic Welding
- Inspection Training
- Laser Training
- EMLK Training
- Vipros - Computer Numeric Control Turret Punch Press Machine
- Customer Specified Shipping and Packaging Specifications

Safety Training will be limited to 10% of total training hours per-trainee.

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
DELEGATION ORDER

Retrainee - Job Creation
Training Proposal for:
Alpha Research & Technology, Inc.

Small Business
ET17-0314

Approval Date: December 8, 2016

ETP Regional Office: Sacramento
Analyst: D. Jordan

CONTRACTOR

- Type of Industry: Manufacturing
- Priority Industry: ☑ Yes ☐ No
- Number of Full-Time Employees
  California: 65
  Worldwide: 66
  Number to be trained: 80
- Owner: ☑ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☑ No
- High Unemployment Area (HUA): ☐ Yes ☑ No
- Turnover Rate: 10%
- Repeat Contractor: ☑ Yes ☐ No

FUNDING

- Requested Amount: $72,800
- In-Kind Contribution: $107,943
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate SB &lt;100</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Improv. HazMat, Mgmt. Skills, Mfg. Skills,</td>
<td>65</td>
<td>8-60</td>
<td>$910</td>
<td>$15.60</td>
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<tr>
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<td>0</td>
<td>Weighted Avg: 35</td>
<td></td>
</tr>
</tbody>
</table>

*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 SB Priority
- **County(ies):** El Dorado
- **Occupations to be Trained:** Manufacturing Assembly & Test; Machine/Machine/Financial Operations; Quality Control; Human Resources; Warehouse & Inventory Management; Manufacturing Engineering; Material Planning & Procurement; Program Management; Business Development; 1st & 2nd Level Management; Executive Management
- **Union Representation:**
  - ☑ Yes
  - ☐ No
- **Health Benefits:**
  - Job #1: $2.81 per hour

## SUBCONTRACTORS

- **Development Services:** N/A
- **Administrative Services:** N/A
- **Training Vendors:**
  - GoEngineer, Sacramento, Computer Skills.
  - Sacramento State College of Continuing Education of Sacramento, will provide Business, Commercial, & Management Skills training.
  - UC Davis Extension Continuing and Professional
Education Division of Sacramento will provide Business, Commercial, & Management Skills training.

New Horizon Computer Training Center of Sacramento will provide Computer Skills training.

OVERVIEW

Alpha Research & Technology, Inc. (ART) (www.artruggedsystems.com) is a woman-owned small business founded in 1993. ART is a systems integrator involved in the design, manufacture, integration and support of high-quality and cost effective airborne Command Control, Surveillance, and Reconnaissance mission systems. ART’s products range from single chassis items to complete network and computing infrastructure development and manufacture. Some of ART’s current and past customers include Lockheed Martin & Boeing Aerospace. The Company’s products are currently installed and operating on numerous airborne military aircraft.

Retrainee - Job Creation

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

ART has committed to hiring 15 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. With ART expanding their types of training to include new competencies to support their new business direction they have committed to hiring employees to help support the new direction.

Need For Training

This will be the fifth ETP-funded Agreement for ART, and the fourth in the past five years. ART’s previous contract focused on increasing efficiencies and enhance production capabilities. ART’s pursuit of opportunities with the Federal Aviation Administration (FAA) and ISO 9001:2015 certification. Training is essential to ART to ensure trainees are up to date with new FAA standards, ISO Standards, new equipment, and upgraded software. In this Agreement training will focus on FAA contract and administration, product design and manufacturing compliance standards. Upgrades have been made to ART’s ERP/MRP system requires training. ART has purchased new 5-axis CNC machine that all shop trainees will be trained on. Training will include the operation, safety, and development and implementation of quality control processes. Training will take place at ART’s new location in El Dorado Hills.

Training Plan

Business Skills – This training will be delivered to all occupations. Trainees will receive training improving communication with internal and external customers and how to demonstrate effective problem identification and resolution skills.

Commercial Skills – This training will be delivered to all occupations. Training will be on the complexities involved in government contracting and how laws/regulations are implemented.
Management Skills – This training will be delivered to Management Staff. Management Staff will receive training on providing constructive feedback on employees’ job performance, leading and developing, coaching teams, and delegating effectively.

Computer Skills – This training will be delivered to all occupations. Trainees will receive training to improve their knowledge and efficiency with computer software. Topics will include JobScope, Crystal Report Writing, SolidWorks, Mercury Web Portal, and UNIX.

Manufacturing Skills – This training will be delivered to Manufacturing and Operations Staff. Trainees will receive cross-training to expand the Company’s workforce skills. Training will also be on lean manufacturing, Surface Mount Soldering (SMS) techniques, 5-axis CNC machining, and standardization of manufacturing processes and procedures for new products.

Continuous Improvement – This training will be delivered to all occupations. Trainees will receive training on improving individual performance and enhance quality assurance at all levels of business operations. Some topics include 5S/Six Sigma, AS9100, ISO9001:2015, and quality assessment/product inspection methods.

Hazardous Materials – This training will be delivered to occupations involved in the handling, storage, and disposal of hazardous materials.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0376</td>
<td>El Dorado Hills</td>
<td>04/28/2014 – 04/27/2016</td>
<td>$44,200</td>
<td>$31,426</td>
<td>(71%)</td>
</tr>
<tr>
<td>ET13-0263</td>
<td>El Dorado Hills</td>
<td>01/28/2013 – 01/27/2014</td>
<td>$49,400</td>
<td>$36,858</td>
<td>(74%)</td>
</tr>
<tr>
<td>ET12-0101</td>
<td>El Dorado Hills</td>
<td>07/13/2011 – 07/12/2012</td>
<td>$49,920</td>
<td>$35,016</td>
<td>(70%)</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Presentation Skills
- Leading Effective Meetings
- Strategic Planning
- Problem Solving and Decision Making
- Business Communication Skills
- Project/Program Management

**COMMERCIAL SKILLS**
- Fundamentals of Government Contracts
- Managing the Post-Award Process for Government Contracts
- Government Contract Compliance & Administration
- Understanding Federal Acquisition Regulations (FAR)
- Government Contracting for Subcontracts
- Accounting Compliance for Government Contracts
- Cost Analysis in Government Contracts
- Defense Contract Audit Agency (DCAA) Compliance
- Government Industry Data Exchange Program (GIDEP)

**COMPUTER SKILLS**
- Microsoft Excel (Intermediate/Advanced)
- Microsoft Word (Intermediate/Advanced)
- Microsoft PowerPoint (Intermediate/Advanced)
- Microsoft Project (Intermediate/Advanced)
- Microsoft Publisher (Intermediate/Advanced)
- Microsoft Access (Intermediate/Advanced)
- Microsoft Visio
- Microsoft SQL
- Microsoft Team Foundation
- Adobe Acrobat
- Windows 8 Usability/Development
- UNIX
- Visual Basic
- SolidWorks
- CamWorks
- Schematic Capture and PCB Layout Software
- Crystal Reports
- JobScope ERP Systems
- 5-Axis CNC Machining – Intro, Intermediate and/or Advanced
- Paycor Payroll and HRIS Systems
CONTINUOUS IMPROVEMENT
- ISO 9001:2015
- AS 9100
- Internal Auditor Certification
- Quality Concepts in Manufacturing
- Failure Mode Analysis
- Root Cause Analysis and Corrective Action
- Statistical Process Control
- Fundamentals of COTS-based Systems Engineering
- Warranty/Void Label Process
- Traceability and Identification
- Counterfeit Electronic Parts Avoidance
- CNC Machine Quality Control
- Monitoring and Measuring of Product
- Monitoring and Measuring of Processes
- FAA Quality Inspections

HAZARDOUS MATERIALS
- Hazardous Material – Handling, Storage, and Disposal
- Understanding Safety Data Sheet (SDS)

MANAGEMENT SKILLS (management trainees only)
- Leadership Development
- Delegating for Results
- Coaching and Leading Teams
- Developing Effective Performance Objectives
- Managing Performance
- Managing Conflict
- Teambuilding

MANUFACTURING SKILLS
- Surface Mount Soldering (SMS) Techniques
- Principles of Lean Manufacturing
- Workmanship Standards
- Electrostatic Discharge (ESD) Prevention
- Cable and Wire Harness (IPC/WHMA-A-620)
- Composite Rack Build
- Supplier Quality Clauses/Evaluation/Rating
- Lot Control and Material Traceability for Receiving Inspection, Warehousing, Kitting and Manufacturing
- Fiber Optics
- Foreign Object Detection (FOD)
- First Article Inspection/NCR
- 3D Scanner/Printer
- Tool Control Procedures
- 5-Axis CNC Machine Operation and Programming – Introduction and Intermediate
- Machine Shop Preventive Maintenance Program
- Manufacturing Build and First Article Build (FAB)
- Supply Chain Logistics Management
- Supply Chain Management Strategies
- Supply Chain Planning and Inventory Management

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

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
DELEGATION ORDER

Training Proposal for:
American Fasteners Co., Ltd.

Small Business

ET17-0361

Approval Date: January 4, 2017

ETP Regional Office: San Diego  Analyst: H. Bernard

CONTRACTOR

- Type of Industry: Manufacturing

- Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees
  - California: 20
  - Worldwide: 20
  - Number to be trained: 20

- Owner: ☒ Yes ☐ No

- Out-of-State Competition: NAICS Code Eligible

- Special Employment Training (SET): ☐ Yes ☒ No

- High Unemployment Area (HUA): ☒ Yes ☐ No

- Turnover Rate: 7%

- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $18,200

- In-Kind Contribution: $32,760
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SB &lt;100 Priority Rate HUA</td>
<td>Business Skills, Computer Skills, Mfg Skills, HazMat</td>
<td>20</td>
<td>8 - 60 0</td>
<td>$910</td>
<td>$11.70</td>
</tr>
</tbody>
</table>

*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 SB Priority
- County: Riverside
- Occupations to be Trained: Operations Staff, Customer Service Staff, Sales Staff, Administrative Staff, Supervisor/Manager, Owner
- Union Representation: ☑ Yes
- No
- Health Benefits: $0.70 per hour

**SUBCONTRACTORS**

- Development Services: Training Funding Source assisted with development of this proposal for a flat fee of $900.
- Administrative Services: Training Funding Source will also assist with administration for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 2015 and located in Jurupa Valley, American Fasteners Co., Ltd. (American Fasteners) manufactures bulk nails, plastic-strip-collated nails, paper-tape-collated nails and wire coil nails. These nails are primarily utilized by builders, contractors and homeowners. This will be the Company's first ETP proposal.

**Need for Training**

Since the second quarter of 2016, American Fastener has been selling out of two types of its plastic collated nails. In order to keep up with customer demand, the Company will be increasing production capacity for these products by adding a new production line in February 2017 and anticipates expansion into a larger facility within 18 months. This product line will include 2 new pieces of equipment, a Nail Header and a Collator. The equipment will convert raw steel into nails, held together into a strip which can then be inserted into nail guns. The
Company will also provide Lean Manufacturing and 5S training to improve product conversion operations and inventory control.

In addition to the new production line, American Fasteners is also in the process of upgrading its accounting and operations software, Sage 100, which is expected to be rolled out January 2017. Sage 100 will run daily production, payroll, accounting and order entry. Trainees will receive extensive training in Sage 100 due to the software’s extensive capabilities.

Training Plan

In order to ensure that all trainees are receiving training requested, the Company’s President will spearhead the training program and work with Administrative staff to coordinate with each department to schedule training and release trainees from the production floor to attend training. Administrative Staff will work with trainers to ensure all documentation is completed properly. Additionally, the Company has retained Training Funding Source who will assist with uploads to ETP’s Online Systems and other administrative duties associated with the project. Training will be provided primarily by in-house trainers; however, vendors may be utilized as needed.

Business Skills: Training will be provided for all staff. Trainees will receive inventory management skills to properly manage inventory, raw materials, expenses and profitability. The Company will also focus on leadership skills for its Managers/Supervisors to improve their communication and coaching skills.

Computer Skills: Training will be provided to all staff. Trainees will learn to operate Sage 100. Training will focus on software system configurations settings, accounts payable/receivable, payroll processing, general ledger, inventory management, work order processing, sales and purchasing.

Hazardous Materials: Training will be provided to all staff. Hazardous Materials training is critical for staff to properly dispose and handle waste materials to stay compliant with city regulations. Training will include Hazardous Materials handling, Waste Compliance and Spill & Leak Control.

Manufacturing Skills: Training will be provided to Operations, Customer Service, Sales, and Administrative Staff and Supervisors/Managers. Trainees will improve manufacturing efficiencies through Lean Manufacturing, 5S, Value Stream Mapping, and Visual Controls courses. Training will also focus on the new production line and equipment.

High Unemployment Area

The 20 trainees in Job Number 1 work in Jurupa Valley (Riverside 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. American Fasteners is requesting the 25% HUA wage modification, from $15.60 to $11.70.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 60

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Communication/Coaching
- Customer Service
- Finance/Accounting procedures
- Leadership Effectiveness
- Marketing and Sales
- Planning
- Product Knowledge
- Reports
- Time Management
- Internal Processes/Procedures
- Problem Solving/Decision Making

**COMPUTER SKILLS**
- Accounting & Operations Software
- Electronic Document Control
- Enterprise/MRP/Financial/Preventative Maintenance/Inventory/Testing
- MS Office/Project
- Payroll System

**HAZARDOUS MATERIALS**
- Hazardous Material Handling/Processing/Manifests
- Hazardous Waste Compliance
- Spill & Leak Control

**MANUFACTURING SKILLS**
- Bill of Materials
- Distribution/Supply Chain
- Good Manufacturing Processes
- Inspection Techniques
- Inventory Flow Control
- Line Set Up
- Lean Manufacturing
- Material Handling
- Order Picking/Packing/Shipping/Receiving
- Preventative Maintenance
- Process/Quality Improvement
- Root Cause Analysis/Corrective Action
- Quality Control Procedures
- Reducing Delivery Time
- Standard Operating Procedures
- Tooling

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

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
American Heat Processing Equipment & Service Co. dba American Crematory

Small Business
ET17-0366

Approval Date: December 15, 2016

ETP Regional Office: North Hollywood   Analyst: M. Niquet

CONTRACTOR

- Type of Industry: Manufacturing
- Priority Industry: Yes No
- Number of Full-Time Employees
  - California: 35
  - Worldwide: 35
  - Number to be trained: 35
- Owner Yes No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 2%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: $36,400
- In-Kind Contribution: $66,899
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SB &lt;100 Priority Rate</td>
<td>Business Skills, Computer Skills, Mfg. Skills, Cont. Imp., OSHA 10/30</td>
<td>35</td>
<td>8-60</td>
<td>$1,040</td>
<td>*$16.48</td>
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</table>

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

- **Reimbursement Rate:** $26 SB Priority
- **County(ies):** Los Angeles
- **Occupations to be Trained:** Administrative Staff, Engineering Staff, Production Staff, Support Staff, Supervisors/Managers
- **Union Representation:** □ Yes ☒ No
- **Health Benefits:** $2.97 per hour

## SUBCONTRACTORS

- **Development Services:** Training Funding Source, Seal Beach, assisted with development for a flat fee of $3,900.
- **Administrative Services:** Training Funding Source will also provide administrative services for an amount not to exceed 13% of payment earned.
- **Training Vendors:** To Be Determined

## OVERVIEW

Founded in 1974 and located Santa Fe Springs, American Heat Processing & Service Co. dba American Crematory (American Crematory) (www.americancrematory.com) manufactures, services and repairs cremation equipment worldwide. American Crematory clients include funeral homes, and human and animal crematories. This will be American Crematory’s first ETP Agreement.

## Need for Training

Since cremation is less of a financial burden on family, there is high demand for new crematory units and an increase for services and repairs. As a small business, meeting this increased
demand in production and services has become difficult to manage as the Company continues to lose business to competitors located outside of California with lower manufacturing costs.

In order for American Crematory to remain viable and competitive, the Company must train staff to work more efficiently. Improving and shortening manufacturing time, and decreasing manufacturing costs, is key to the Company’s success. Training will enable staff to, increase the number of customers, drive sales and implement new efficient processes. By working smarter, the Company will not only retain its current client base, but will grow this base through technology, a more cost effective and efficient way to manufacture the Company’s crematory units, and elevate service skills.

**Training Plan**

Training will take place at the Company’s Santa Fe Springs location and will be provided by in-house subject matter experts and vendors to be identified during the contract term.

**Business Skills:** Training will be offered to all occupations to develop skills and give staff an understanding of planning and processing. Coaching and leadership skills training will create more efficient and productive employees.

**Computer Skills:** Training will be offered to all occupations. This training will provide employees software tools like Microsoft Office Excel, PowerPoint, Outlook and the Company's MRP system.

**Continuous Improvement:** Training will be offered to all occupations to assist the Company create an effective culture of Lean manufacturing and process improvement. This training will increase efficiencies across all functions by eliminating waste.

**Manufacturing Skills:** Training will be offered to Production, Support and Engineering Staff. Training in operational processes will enhance the technical skills of employees, enabling them to excel in new and improved manufacturing processes.

**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. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities for Production, Support and Engineering Staff. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

**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**
- Coaching/Communication
- Cremation Certification
- Customer Service
- Finance/Accounting procedures
- Goal Setting & Prioritizing
- International Traffic in Arms Regulations
- Leadership
- Facilitator
- Planning, Zoning, Permitting, Building Layout, Construction, Installation, Start-Up
- Product Knowledge
- Project/Program Management
- Sales
- Teams
- Time Management
- Work Processes and Procedures

**MANUFACTURING SKILLS**
- Blueprint Reading
- Diagnostics, Service and Repair
- Distribution/Supply Chain/Logistics Procedures
- Equipment Operation, Maintenance & Troubleshooting
- Fabrication
- Good Manufacturing Processes
- Inspection Techniques
- Kaizen
- Lean Manufacturing
- MasterCam
- Material Requirements Planning
- Refrigeration & Cooler Rack Systems
- Shop Equipment & Tools
- Tool Making
- Tune-Up, Calibration, Refractory Repair
- Welding - Mig & Tig

**COMPUTER SKILLS**
- Adobe
- Autodesk Software (Inventor, Arias, 3d Max)
- Calibration Manager
- Document Control
- Engineering Design Software
- ERP/Financial/Accounting/HR/Payroll
- MS Office/Project
- MRP Software (MASS & Sales Logix)
- Payroll Processing
- Salesforce/CRM
- Web Applications

**CONTINUOUS IMPROVEMENT**
- 5S
- Siemens
- ISO 9001
- ISO 13585:2003
- Internal Audits
- Kaizen
- Lean Manufacturing
- Process Improvement
- Problem Solving
- Product Knowledge
- Productivity Improvement
- Quality Improvement
- Statistical Process Control
- Six Sigma Process Controls

**OSHA 10/30** (Certified OSHA Instructor)
- OSHA 10  (requires 10hrs completion)
- OSHA 30  (requires 30hrs completion)

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
DELEGATION ORDER

Retrainee - Job Creation
Training Proposal for:
Aqua Metals, Inc.

Small Business
ET17-0378

Approval Date: December 20, 2016
ETP Regional Office: San Francisco Bay Area  Analyst: R. Jackson

CONTRACTOR

- Type of Industry:
  - Engineering
  - Technology/Other
  - Priority Industry: Yes No

- Number of Full-Time Employees
  - California: 29
  - Worldwide: 80
  - Number to be trained: 30
  - 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: $49,998
- In-Kind Contribution: $54,600
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100 Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Imp., OSHA 10/30, HazMat, Mfg. Skills</td>
<td>27</td>
<td>8-100</td>
<td>$1,560</td>
<td>$25.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraine SB &lt;100 Priority Rate Job Creation</td>
<td>Computer Skills, Cont. Imp., OSHA 10/30, HazMat, Mfg. Skills</td>
<td>3</td>
<td>8-200</td>
<td>$2,626</td>
<td>$25.00</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 101</td>
<td></td>
</tr>
</tbody>
</table>

- **Reimbursement Rate:** Job #’s 1 & 2: $26 SB Priority
- **County(ies):** Alameda
- **Occupations to be Trained:** Owner, Engineer, Production Staff, Administrative Staff, Sales Staff, Manager, Technician
- **Union Representation:** Yes
- **Health Benefits:** N/A

### SUBCONTRACTORS

- **Development Services:** TGII, Suwanee, GA, assisted with development at no cost.
- **Administrative Services:** TGII will also provide administrative services for a fee not to exceed 13% of payment earned.
- **Training Vendors:** BSI Group, Alameda, will provide OSHA 10/30 training.

### OVERVIEW

Established in 2014 and located in Alameda, Aqua Metals, Inc. (Aqua) (www.aquametals.com) develops and produces an innovative electrochemical recycling system, Aquarefining, to extract lead and plastic products from batteries. Aquarefining systems are portable units that extract lead at battery manufactures sites. Aqua’s new recycling technologies and processes are cleaner than smelting, an existing practice used to extract lead. Clients include Interstate Batteries and Battery Systems Inc. These are companies that supply recyclable batteries and purchase lead and/or the plastic bi-products extracted from the Aquarefining modules, including polypropylene and polycarbonate chips plastic.
Aqua Metals, Inc.

Aqua expanded and relocated its engineering and design manufacturing location to Alameda in 2015. The expanded operations are helping the Company to innovate products capable of extracting lead in water-based processes versus burning. These new products allow for greener standards in recycling lead at even lower costs. The global deployment of 10 Aquarefining Modules, anticipated in 2017, will further reduce recycling costs for customers.

ETP-funded training will reinforce the roll out of new processes and equipment, along with quality assurance and skill upgrades.

Aqua is eligible as a NAICS approved entity with Out-of-State Competition, and qualifies for the priority reimbursement rate.

Retrainee - Job Creation

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

Aqua has committed to hiring three 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.

Aqua projects a large volume of raw materials to be delivered in 2017 and must hire additional staff to facilitate the execution of their new business developments. The build out of new modules and recycling tons of lead and plastics under existing contracts requires new processes and procedures as the Company transitions from preparation stages to a fuller execution stage. The Company must hire three staff members to assist with the additional business. Aqua has ample floor space to provide room for new equipment and new employees.

Training Plan

Training will be provided by vendors and in-house experts.

Business Skills: Training will be offered to Managers, Administrative Staff and Owners. Aqua has scheduled deployments of technology to support building lead refineries globally and aims to increase lead extraction productions to yield an estimated 80 metric tons of recycled and re-sellable lead per day. Training on topics such as Performance Management, Business Strategies for Growth, Customer Service and Leadership is proposed to help meet rapid business growth objectives.

Computer Skills: Training will be offered to all occupations the new ERP system and upgraded hardware and software. Training will include CAD/CAM, ERP, Hardware & Server Configuration and Microsoft.

Manufacturing Skills: Training will be offered to Managers, Engineers, Production Staff and Technicians. Select Administrative Staff will receive Operations Training to manage fiscal responsibilities. The Company is building refineries using new sophisticated machining equipment and workers must train in Safety, Chemical Manufacturing, Equipment Operations, Assembly Skills to meet production and quality assurance goals.

Continuous Improvement: Training will be offered to all occupations to develop efficiency through quality assurance initiative trainings. Staff will be able to make decisions and take immediate action, resulting in a greater attention to detail, error reduction, and a reduction in customer response time. ISO 9001:2008 training will also be provided to ensure quality
standards are met for various customer and industry requirements. Topics include Lean, Team Building and Continuous Improvement Techniques.

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 also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom. In this proposal, first responder Engineers, Technicians and Production 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 by Environmental Resource Center, a private entity, which Aqua represents meets Hazardous Materials Regulations as an authorized training entity.

Range of Hours Modifications

Although small business proposals are capped at 60 hours per trainee, Aqua requests a modification to increase the maximum to 100 hours (Job Number 1). Due to the purchase of manufacturing equipment and a new ERP system, extensive training hours are required for 25 Administration, Engineering and Production Staff.

Due to the duration of the safety training, ERP, and technical skills training needed to reach the level of expertise to develop or manufacture Aquarefining systems, 60 hours of training is insufficient for new employees. Aqua has scheduled an estimated 300 hours of training for the new employees based on assessed training needs. Therefore, Aqua is requesting ETP’s allowance of up to 200 training hours in Job Number 2 to help an estimated three newly hired employees gain the skills needed to be successful.

Professional Employer Organization

Although Aqua has an active CEAN, it uses a Professional Employer Organization (PEO), Insperity. A copy of the PEO contract with Insperity was received and approved by ETP during the development of this proposal. It is agreed that Aqua will retain the right to direct and control the work performed by trainees during retention and set the amount of their post retention wages.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8-100 (Job 1)
8-200 (Job 2)

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Business Strategies for Growth
- Customer Service Skills for Growth
- Leadership for Growth
- Performance Management
- Sales & Marketing for Growth

**COMPUTER SKILLS**
- Computer-Aided Design/Computer-Aided Manufacturing
- Enterprise Resource Planning
  - Epicor
- Software Systems
  - Microsoft Applications
  - Proprietary Reporting & Support Systems
- Server & Hardware Configurations

**CONTINUOUS IMPROVEMENT**
- Continuous Improvement Techniques
- Team Building
- Quality Concepts
- Frontline Decision Making & Problem Solving
- High Performance Workplace Systems
- Lean Six Sigma
- ISO 9001:2008

**MANUFACTURING SKILLS**
- Advanced Techniques for New Products, Industry Clients & Processes
  - Logistics
  - Safety
  - Chemical Manufacturing
  - Design & Engineering
  - Equipment Operations
  - Maintenance Equipment
  - Assembly Skills
  - Warehouse Skills
  - Production Skills

**OSHA 10/30 (Certified OSHA Instructor)**
- OSHA 10 (Requires 10hrs completion)
- OSHA 30 (Requires 30hrs completion)

**HAZMAT**
- Hazardous Materials Handling
Safety Training cannot exceed 10% of total training hours per-trainee (This cap does not apply to Hazmat or OSHA 10/30.)

| Note: Reimbursement for retraining is capped at 100 hours per trainee in Job Number 1 and capped at 200 total training hours per trainee in Job number 2 regardless of the method of delivery. |
DELEGATION ORDER

Retrainee - Job Creation
Training Proposal for:
Arrow Sign Company

Small Business
ET17-0387

Approval Date: January 18, 2017

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

CONTRACTOR

- Type of Industry: Manufacturing
  Construction
  Priority Industry: Yes No

- Number of Full-Time Employees
  California: 82
  Worldwide: 82
  Number to be trained: 39
  Owner Yes No

- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 19%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: $21,476
- In-Kind Contribution: $12,000
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SB &lt;100 Priority Rate</td>
<td>Mfg. Skills, Business Skills, Commercial Skills, OSHA 10/30, Computer Skills, Cont. Improv</td>
<td>26</td>
<td>8-60 0</td>
<td>$520 $17.02</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraine Job Creation Initiative SB &lt;100 Priority Rate</td>
<td>Mfg. Skills, Business Skills, Commercial Skills, OSHA 10/30, Computer Skills, Cont. Improv</td>
<td>7</td>
<td>8-60 0</td>
<td>$780 *$14.19</td>
<td>*$14.19</td>
</tr>
<tr>
<td>3</td>
<td>SB&lt;100 Priority Rate HUA Retraineer</td>
<td>Mfg. Skills, Business Skills, Commercial Skills, OSHA 10/30, Computer Skills, Cont. Improv</td>
<td>6</td>
<td>8-60 0</td>
<td>$416 *$12.77</td>
<td>*$12.77</td>
</tr>
</tbody>
</table>

*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 - 3: $26 SB Priority
- **County(ies):** Alameda, San Joaquin
- **Occupations to be Trained:** Managers, Installation Staff, Engineering, Sales Staff, Contract Control, Project Coordinators, Production Staff.
- **Union Representation:** ☑ Yes Ironworkers Local 378  □ No
- **Health Benefits:** Job #1: $2.65 per hour

## SUBCONTRACTORS

- **Development Services:** N/A
- **Administrative Services:** N/A
- **Training Vendors:**
  - Effective Training Solutions of Oakland will provide Business Skills training.
  - Turner Safety of San Leandro will provide OSHA 10/30 and Commercial Skills training.
  - H + H Truck School of Tracy will provide Commercial Skills training.
OVERVIEW

For over 60 years, Arrow Sign Company (Arrow) has manufactured electric and architectural signs. The Company's products are used primarily for brand identification and business location visibility. Arrow's basic sign product is composed of either steel or aluminum and decorated to reflect the customer's name and/or logo. As a full-service sign company, Arrow provides services ranging from initial design concepts to detailed plans. The Company also provides fabrication, installation and maintenance of their products. Arrow customers include major hotels, property management companies, building owners, shopping centers, and general contractors.

Arrow uses Computer-Aided Design and Computer-Aided Manufacturing software integrated for design and fabrication. This technology provides Arrow with a competitive advantage. In order to meet growing customer demands and preserve its market share, Arrow seeks ETP funding to train employees at company sites in Oakland and Stockton.

This is Arrow's third ETP Agreement, the third in the last 5 years. The first ETP agreement focused on increasing business skills and manufacturing skills. The second agreement focused on meeting growing market demands, new developments in sign making, and increased competitiveness in securing contracts through changing bidding processes.

This proposal focuses on training to maintain competitiveness and hiring of new employees to keep pace with a growing market demand for interior signs (30% growth reported in 2015-16). Arrow represents to meet it’s business goals, providing opportunity for the transfer of knowledge from senior retiring staff to new and less experienced staff members, cross-training for drivers on truck operations and providing production staff (welders) with welding Stick Welding 7018 certifications and 232 Overhead Welding certifications required by customers are needed. HR needs supportive training to update themselves on a myriad of regulations and internal processes pertaining to successfully onboarding new hires. Additionally, training is needed for new equipment and skills upgrades (including new trucks, cranes, and software) and cross-training to boost productivity and efficiency.

Welders are represented by Iron Workers Local 378 which has approved this proposed training and submitted a letter of support.

Arrow is eligible for standard retraining under the Out-of-State Competition Provisions for industrially-classified manufacturers retraining current employees. Arrow is eligible as a Small Business with Priority Industry designations based on the size and type of the business.

Retrainee - Job Creation

The Panel offers incentives to companies that hire new employees. A lower post retention wage is allowed consistent with ETP’s existing New Hire wage. Arrow is requesting the post-retention wage of $14.19 (excluding health benefits) for Job Number 2. Per Job Creation Guidelines, contracts may be written for two years to allow greater flexibility for the delivery of more training. Arrow requests a two year contract term. Arrow represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract.
High Unemployment Area

The 6 trainees in Job Number 3 work in Stockton, a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%.

For trainees 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. Arrow requests a wage modification, from $17.02 to $12.77, for retrainees in Job Number 3.

Training Plan

All the proposed training is new content designed to supplement previous training. While some of the types and topics appear to be the same, the content has been updated. The training will be delivered by in-house trainers and vendors.

Business Skills: This training will be delivered to Contract Control, Project Coordinators, Sales, and Managers. Training will assist The Company as they manage growth and new project initiatives and implement ongoing business changes, such as reforms in HR processes to support growth. Expanding the skillsets of employees reinforces Arrow Sign Company’s commitment to creating a high performance workplace. Topics such as Estimating, Human Resources, and Effective Communications will be delivered.

Commercial Skills: Training will be offered to Production Staff and Installation Staff. This training will cross-train employees and diversify their current specializations so that employees have broader skillsets. Training will improve the ability of individual employees to perform more functions and services in order to boost overall productivity, improve safety, and gain specific competencies. Crane Operations, Electric Sign Installation, and Rigging are some examples of topics delivered. Driving related training does not include required licensing requirements. Some training topics will be delivered by vendors that offer certifications to demonstrate gained competencies such as forklift driving. Certifications generally add value to employees readiness to accept higher skilled higher paying positions.

Computer Skills: Training will be offered to Administrative Staff, Sales Staff, and Management Staff. Products like Gaant Charts and Microsoft Excel are being used by key contractors. Staff needs to be proficient and current on the newest software skills.

Manufacturing Skills: Training will be offered to Production Staff and Engineers. This training will help speed product fulfillment. New machinery including; mill saw, trimming, drills, vacuum, sander and spray gun were purchased to keep pace with business changes. Training topics include; Tools, Structural engineering, Welding, and Certified Welding Inspector.

Continuous Improvement: Training will be offered to all staff to improve efficiency. Training topics include; Improving Sales Skills, and Negotiations. Sales Staff will receive Sales Skills Training which combines new product knowledge and customer relations. Construction Methodology will be given to Engineers to enable them to competitively bid and retain customers.

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. Arrow has identified Production Staff employees, Welders, Managers, and Installers, that may attend OSHA 10. Frontline Managers or Supervisors may attend OSHA 30.

➢ Training Infrastructure

Training vendors have been secured and the Company is ready to start training. The HR contact is in charge of the training program from Development to Administration. The Managers and Owner are directly involved in the planning and delivery of training.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0150</td>
<td>Oakland Stockton</td>
<td>08/18/15 – 08/17/16</td>
<td>$12,688</td>
<td>$9,615 (76%)</td>
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<tr>
<td>ET13-0305</td>
<td>Oakland Stockton</td>
<td>03/08/13 – 03/07/15</td>
<td>$45,760</td>
<td>*$13,104 (29%)</td>
<td></td>
</tr>
</tbody>
</table>

*During the ET13-0305 ETP Agreement, Arrow encountered difficulty releasing employees for training due to peak business periods. In the subsequent Agreement, The Company accounted for peak business periods and planned training schedules around those times to improve performance. The increased time to train on the proposed agreement is designed to further improve performance.
Exhibit B: Menu Curriculum

Class/Lab Hours
8-60 Job Numbers 1-3 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Contract Reading and Writing
- Estimating
- Human Resources
  - Organizational Behavior
  - Health and Safety in the Workplace
  - Leadership in HR
  - Dealing with Conflict
  - Training and Development
- Project Management
- Effective Communications

**COMMERCIAL SKILLS**
- Pre/Post Trip Inspections
- Skid Steer
- Bob Cat
- Forklift
- Rigging
- Electric Sign Installation
- Electrical Wiring
- Crane Operation

**OSHA**
- OSHA 30
- OSHA 10

**COMPUTER SKILLS**
- Excel
- GAANT Charts
- Customer Resource Management
- AutoCAD Program

**CONTINUOUS IMPROVEMENT**
- Improving Sales Skills
- Negotiations
- Construction Methodology
- Contract Terms
- Product Demonstrations

Safety Training is capped at 10% of a trainee’s total training hours excluding OSHA 10/30.

**MANUFACTURING SKILLS**
- Structural Engineering
- Welding
- Blueprint Reading
- Certified Welding Inspector
- Tools

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
October 31, 2016

Robert Jackson
1065 East Hillsdale Blvd, Ste 415
Foster City, CA 94404

Dear Mr. Jackson:

The following letter serves to confirm that Arrow Sign Co. has been in accordance with our rules, regulations, and have complied with our Collective Bargaining Agreement.

We are very satisfied with the overall performance of this company, and we authorize Arrow Sign Co. to conduct specialized training to Iron Worker Local Union No. 378 members that is not included in our Training Facility curriculum.

Should you have any questions or concerns, please feel free to contact our office at 707-746-6100.

Best Regards,

Jeff McEuen
Business Manager/FST

JM:ym
Opeiu-29/afl-cio
DELEGATION ORDER

RETRAINEE - JOB CREATION
Training Proposal for:
Ascena Retail Group, Inc.
Agreement Number: ET17-0397

Approval Date: January 19, 2017
ETP Regional Office: San Diego
Analyst: H. Bernard

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
<th>Job Creation Initiative</th>
<th>Industry Sector(s):</th>
<th>Warehousing</th>
<th>Retail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Priority Industry: ☑ Yes ☐ No</td>
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<tr>
<td>Counties Served:</td>
<td>Riverside</td>
<td>Repeat Contractor:</td>
<td>☐ Yes ☑ No</td>
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<td></td>
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</tr>
<tr>
<td>Union(s):</td>
<td>☐ Yes ☑ No</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Number of Employees in:
CA: 646
U.S.: 13,399
Worldwide: 13,399

Turnover Rate: 0%
Managers/Supervisors:
(% of total trainees) 0%

FUNDING DETAIL

Program Costs: $96,120
(Substantial Contribution): $0
(High Earner Reduction): $0
Total ETP Funding: $96,120

In-Kind Contribution: 100% of Total ETP Funding Required: $72,540
INTRODUCTION

Ascena Retail Group, Inc. (Ascena) (www.ascenaretail.com) is a national specialty retailer offering apparel, shoes and accessories for women under the Ann Taylor, LOFT, Lou & Grey, Lane Bryant, Maurices, Dressbarn and Catherines, and for girls under the Justice brand. Ascena also operates the retail stores for those brands. The Company and its respective retail stores recently experienced a restructuring which created a new operating model and has created distinctions between its brands of premium, plus and value brands. This is Ascena’s first ETP Agreement.

Ascena operates ecommerce websites, two distribution centers and over 4,800 retail stores throughout the United States. Ascena is opening a third distribution center in Riverside in March 2017. This will be the Company’s first distribution center on the west coast. Once fully operational,
the new center will service approximately 1,500 of Ascena’s 4,900 stores. Starting in late 2017, the Company will transition the Riverside center to handle fulfillment operations for e-commerce orders. This transition will result in additional investment in equipment and training, but should not require additional staff.

Ascena is eligible as a company primarily engaged in providing services to out-of-state customers where revenues comprise more than 50% to out-of-state retail locations. The retail stores will not participate in the Agreement.

Retrainee - Job Creation

Ascena recently leased 580,000 square feet of newly constructed warehouse space and has made an investment of over $40 Million in leasehold improvements, IT infrastructure and material handling equipment. The Company plans to hire 220 additional hourly positions, of which 216 will be included in the ETP project (Job Number 2). Hiring will occur in a phased approach, adding 90 new jobs in February, 85 in March, 20 in April and 19 in June of 2017.

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

In-house trainers will provide training to two occupations, Material Handlers and Maintenance Technicians. Training will be delivered via class/lab and Productive Lab (PL) and in two phases. The first phase will be delivered January-March and focus on new hire training for Material Handlers to ensure all new staff is trained. The second phase will focus on e-commerce.

Material Handlers will participate in class/lab training upon hire to learn to prepare and pack merchandise for shipment to Ascena’s stores. The Company has created a simulated work setting as a laboratory training center. This will ensure that each new staff member is able to quickly and accurately perform job duties while working in a non-productive setting. Once the staff has been transferred to the production floor they will receive productive lab training once per week for six weeks.

The Maintenance Technicians are responsible for keeping the equipment running and must be extensively trained on all equipment and warehouse operations. Training will focus on mechanical systems, electrical systems, hydraulic systems, pneumatic maintenance, conveyors repair, sorter operations and e-commerce equipment.

Commercial Skills (87%): Training will be offered to all occupations. This training will include Picking, Packing, Shipping, equipment operations, standard operating procedures. This will give the material handlers the necessary skills to pack and ship all merchandise.

Productive Lab – Commercial Skills (13%): Training will be offered to Material Handlers. This training will focus on the equipment and procedures associated with utilizing equipment. Training will ensure that the handlers fully understand the classroom/laboratory and can accurately process merchandise.
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. Productive Lab training is capped at a maximum of 60 hours.

Ascena is requesting PL training as supplement to initial class/lab training new staff will receive during the first week. Training will occur for the first six weeks of employment, once per week for 30 minutes with a manager. The ratio for PL training will be 1:1. Prior to the training session, the trainer will review the employee’s Labor Management Score, a tool within the warehouse software management system that tracks productivity for each staff member on the production floor. The PL sessions will allow the trainer to work with staff with low labor management scores to ensure all warehouse operations are running efficiently. The score is tied to pay incentives and allows Ascena to track skills gaps, provide additional training where necessary, and verify worker competencies at the end of PL training.

Commitment to Training

Ascena has budgeted $100,000 for training in 2017 for the new facility which will be provided outside of ETP funding. Training will include sessions in forklift certification, human resources, IT, leadership and online training sessions that will be provided to all staff. ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The Human Resources Manager will oversee the project, and the HR Specialist will be responsible for the administration. Both the HR Manager and the HR Specialist will work with the warehouse management staff to schedule training and collect rosters.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

GBQ Partners in Cincinnati, Ohio assisted with development for a flat fee of $2,500.

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 200
Trainees may receive any of the following:

COMMERCIAL SKILLS
- Standard Operating Procedures
- Radio Frequency Scanner
- Ticketing/Re-Ticketing
- Picking
- Packing
- Shipping
- Loss Prevention
- Roles and Responsibilities
- Start-Up Procedures
- Teaming in Pack Bays
- Packing Etiquette
- Labor Management Scoring
- eCommerce Picking
- eCommerce Packing
- Conveyor System
- Sorter System
- Electrical Systems
- Mechanical Systems
- eCommerce Equipment Troubleshooting, Maintenance & Repairs
- Hydraulic Systems
- Pneumatic Maintenance
- MHE and Conveyors Repair
- Sorter Operation
- Forklift Service

PL Hours
0 – 60
COMMERCIAL SKILLS (Ratio 1:1)
- RF Scanner
- Ticketing/Re-Ticketing
- Picking
- Packing
- Shipping

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

Retrainee - Job Creation
Training Proposal for:
Associated Pension Consultants, Inc.

Small Business
ET17-0353

Approval Date: December 7, 2016

ETP Regional Office: Sacramento  Analyst: K. Mam

CONTRACTOR

- Type of Industry: Services
  Financial
  Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees
  California: 65
  Worldwide: 83
  Number to be trained: 63
- Owner ☐ Yes ☒ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 9%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $83,160
- In-Kind Contribution: $119,940
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Business Skills, Comm'l Skills, Computer Skills, Cont. Imp.</td>
<td>59</td>
<td>8-60</td>
<td>0-30</td>
<td>$1,320</td>
<td><strong>$15.60</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee, Job Creation Initiative Business Skills, Comm'l Skills, Computer Skills, Cont. Imp.</td>
<td>4</td>
<td>8-60</td>
<td>0-30</td>
<td>$1,320</td>
<td><strong>$12.77</strong></td>
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<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*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: $22 SB Non-Priority
- County(ies): Butte, Sacramento
- Occupations to be Trained: Operation Staff, Sales Staff, Adminstration Staff
- Union Representation: □ Yes  ☑ No
- Health Benefits: Job #1: $2.33 per hour  Job #2: $1.65 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach assisted with development for a flat fee of $4,900.
- Administrative Services: TFS will also provide administrative services for a fee not to exceed 13% of payment earned. To Be Determined

OVERVIEW

Founded in 1974 and headquartered in Chico, Associated Pension Consultants, Inc. (APC)[www.e-apc.com] specializes in professional design, installation, administration and consulting services for retirement plans. Customers include employers that provide pension and/or retirement plans for their employees. APC competes with pension companies outside California. Training under this proposal will be for its Chico and Sacramento location.

Need for Training

This will be APC’s second ETP Agreement. Training under the previous proposal focused on transitioning to paperless processes and preparing for a restatement project requiring the
Company to rewrite/restate existing pension documents due to changes in federal regulations. Each client’s pension plan is customized; therefore, the Company must review each client’s pension documents and move them to new formats. Training under this proposal will partially continue training on the restatement project. Although training topics are similar to prior Agreements, in no case will a trainee repeat the same training previously delivered. Training will focus on revising Defined Benefit plans and proper procedures on how to map over existing documents to new formats. Training will also include the Company’s newly upgraded SunGard Relius Prototype Document Software.

Cross-training will also be provided to enable employees to assist in other department as workflow changes seasonally. Training will assist the Company to maximize resources and skills companywide during peak months.

Retrainee - Job Creation

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

The Company is expanding their workforce over the next two years. The Company is currently in negotiations for an additional sales office in California. The Company has committed to hiring four new employees (Job Number 2). The Company will hire Operation, Sales and Administration Staff. The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Training will be delivered via classroom/laboratory and Computer-Based Training (CBT) by In-house subject matter experts. Training vendors may be utilized if needed.

Business Skills: Training will be offered to all occupations. Training will assist workers communicate effectively with clients, meet deadlines and improve sales. Training topics include Client Relations and Retention, Communication in the Workplace and Marketing & Business Development.

Commercial Skills: Training will be offered to Operation and Sales Staff. Training in Defined Contribution and Benefit Plans will provide employees the skills to successfully administer and market the Company’s retirement plans. Topics will also include 401(k) Plans and Cash Balance Plans.

Computer Skills: Training will be offered to all occupations. Training will focus on new software upgrades and preparing electronic packages. Training topics includes E-File Cabinet, Pension Reporter and SunGard Relius.

Continuous Improvement: Training will be offered to all occupations. Training will improve skills to evaluate and streamline work processes, eliminate redundancies and exceed client expectations. Training topics include Managing Generational Differences, Performance, Process and Quality Improvement and Team Building Skills.

RECOMMENDATION

Staff recommends approval of this proposal.
PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0213</td>
<td>Chico and Sacramento</td>
<td>11/18/13 – 11/17/15</td>
<td>$58,784</td>
<td>$41,506</td>
<td>71%</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab Hours
8-60

**BUSINESS SKILLS**
- Communication in the Workplace
- Client Relations and Retention
- Leadership
- Marketing & Business Development
- Product Knowledge

**COMMERCIAL SKILLS**
- 401(k) Plans
- 403(b) Plans
- Cash Balance Plans
- Defined Benefit Pension Plans
- IRS Form Preparation and Related Schedules
- Profit Sharing Plans
- Qualified Plan Administration

**COMPUTER SKILLS**
- Adobe Software
- APC Gold (Proprietary software)
- Citrix
- E-File Cabinet
- Datair
- Internet Explorer – Download for Statements
- MS Office 2010
- Pension Reporter
- Planmine
- Right Signature
- Sage 50
- SunGard Relius
- Time Tracker
- Work In Progress
- WinZip – Documents
- Windows XP and Windows 7
- ZixMail

**CONTINUOUS IMPROVEMENT**
- Constructive Criticism and Essential Communication Skills
- Overcome Disruptive Work Style Differences
- Managing Generational Differences
- Motivating Manager
- Performance, Process and Quality Improvement
- Staff Improvement
- Supervision Skills
- Team Building Skills
CBT Hours
0 – 30

COMMERCIAL SKILLS
- Accredited Pension Administrator 1: Fundamentals of Qualified Plan Administration (10 hours)
- Accredited Pension Administrator 2: 401(k) Plan Administration (20 hours)
- Accredited Pension Administrator 3: Distributions and Loans (20 hours)
- Accredited Pension Administrator 4: Selected Topics in Retirement Plans (20 hours)

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee.
Training Proposal for:
Babcock Laboratories, Inc.

Small Business
ET17-0351

Approval Date: December 14, 2016
ETP Regional Office: San Diego
Analyst: M. Ray

CONTRACTOR

- Type of Industry: Services
  Biotechnology/Life Sciences
  Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees
  California: 68
  Worldwide: 68
  Number to be trained: 54

- 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: $63,180
- In-Kind Contribution: $78,537
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainees Priority Rate SB &lt;100</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Imp., HazMat, PL - Commercial Skills</td>
<td>54</td>
<td>8 - 200</td>
<td>0</td>
<td>$1,170</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): Riverside
- Occupations to be Trained: Administrative Support, Field Technician, Laboratory Analyst, Sample Receiving, Sales, Manager I, and Manager II
- Union Representation: Yes
- Health Benefits: Job #1: $1.22 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach will assist with the development of this proposal for a flat fee of $2,900.
- Administrative Services: TFS will also assist with administration for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Located in Riverside, Babcock Laboratories, Inc. (Babcock Labs) (www.babcocklabs.com) was originally founded in 1906 as an assayer’s (analyzing metal) shop. In its early days during the citrus boom, the Babcock Labs helped agricultural farmers in the Inland Empire by providing water and soil testing services. As Riverside County developed and the needs of local businesses changed, so did the Company’s scope of analytical testing.

Today, the Company employs 68 individuals and occupies two adjacent buildings in the city of Riverside where it specializes in the analysis of drinking water, wastewater, storm water, groundwater, food and beverage, soils, and hazardous materials. Babcock Labs’ diverse customer base includes small, large, private, public, local, and national organizations, with various testing needs.
Babcock Laboratories, Inc.

The majority of Babcock Labs' clients are public agencies. This requires the Company to meet specific regulatory requirements and certifications from accrediting bodies including National Environmental Laboratory Accreditation Program, the California Environmental Laboratory Accreditation Program, the Association for Laboratory Accreditation, and the United States Environmental Protection Agency’s Unregulated Contaminants Monitoring Rule Program. In order to meet stringent regulations and ensure the Company exceeds industry average, Babcock Labs must regularly track its performance results determined by its Proficiency Testing scores and its customer service quality as determined by client satisfaction surveys. These results also help Babcock Labs to assess skills gaps within the company.

Babcock Lab’s wide range of competitors includes small, independent commercial laboratories and public laboratories, international conglomerate laboratories, and out-of-state laboratories. These competitors have far greater resources which allow them to offer comparable services at prices Babcock Labs cannot match without losing profitability.

In an effort to keep up with industry regulations and certification requirements, internal quality and customer service standards; and to compete nationally and internationally, the Company must provide its workers with highly technical skills training in all facets of analytical testing, specifically in standard methods, quality control, chemistry, and proper use of equipment and instrumentation. Training will ensure a highly-skilled and efficient workforce that is viable in a global industry.

**Training Plan**

The Company plans to train approximately 54 workers. Training will be delivered via class/lab and productive lab settings in the following:

**Business Skills** – Training will be provided to all occupations. Training topics include Communication Skills, Sales/Marketing, Project Management, and Product Knowledge, providing trainees with skills to successfully sell, service, and maintain new and current accounts. Client/Customer Relations training will support a culture of exemplary customer service to attract new business and retain existing customers.

**Commercial Skills** – Training will be provided to all occupations. Training topics in various testing equipment and methods will provide trainees the necessary skills to understand daily operations, introduce new or increase skills in various operational areas, and continue to receive ongoing education to stay current and competitive in the marketplace.

**Computer Skills** – Training will be provided to all occupations. Course topics include Cloud Solutions, Adobe, Crystal Reports, Web Design and Graphics Software Application, and various laboratory testing software applications. Training will ensure that trainees will learn new features of each software application to efficiently review testing data and methods as well as develop or create technical reports.

**Continuous Improvement** – Training will be provided to all staff. Training topics in Lean Process Improvement, ISO 17025, Six Sigma, Quality Assurance/Quality Control, and Process Improvement will help increase employees’ technical skills to improve daily operations as well as business and customer service processes.

**Hazardous Materials** – Training will be provided to all occupations. Training in Hazardous Communication and Labeling (Global Harmonizing System) will increase employees’ knowledge and skills on how to effectively handle all types of hazards within their working environment.
Productive Laboratory (PL) – Commercial Skills

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

Babcock Labs requests up to 24 hours of PL training for approximately 41 Field Technicians, Laboratory Analysts, Sample Receiving, and some Administrative Support Staff who are responsible for direct handling of testing samples and procedures. Course topics are focused on various analytic procedures in Microbiology, Organics, Inorganics, Metals, Food, and Ion Chromatography. Training will also focus on testing equipment and procedures such as Pipette, Glassware, Balance and Weights, Element Laboratory Management System, Standard and Reagent Preparation, Instrumentation, and Sample Handling.

The PL trainer will be a qualified, expert to deliver the course content and material. The trainer will be responsible for educating, demonstrating, and instructing procedures, as well as answering questions and documenting training. Trainer will also determine trainee’s proficiency.

The trainer-to-trainee ratio will be 1:1. The Company anticipates reduced production time, increased error rate, increased labor time, and increased amount of consumable costs during PL training. Training will provide trainees with the skills to be competent in the handling and analysis of testing samples and the effective operation of the equipment and specific testing processes, without the pressure of normal production requirements.

Modifications

Increase in Range of Hours

Although the standard range of hours for Small Business is 8-60 hours, Babcock Labs requests an increase in the maximum hours from 60 to 200 training hours, an average of 45 hours for all trainees. The increase in the maximum range of training hours will allow the Company to provide some core trainees significant and necessary technical skills training.

In addition, Babcock Labs continually engages in research and development of its practices and is currently considering expansion into new markets. Additional training will be provided to support continuous business process improvements as the Company develops new testing and methodology, as well as sales and marketing procedures.

Contract Term

Babcock Labs requests an additional 12 months in the term of contract, from 12 to 24 months, to allow sufficient time to complete critical training.

RECOMMENDATION

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Budgeting and Financial Management
- Client/Customer Relations
- Coaching
- Communication Skills
- Goal Setting
- Planning
- Product Knowledge
- Project Management
- Sales/Marketing
- Proposal and Business Development
- Technical Editing and Writing
- Client Notification Training

**COMMERCIAL SKILLS**
- Chemistry
- Equipment Operations & Maintenance
- Inspection Procedures
- Laboratory Testing Procedures
- Liquid Chromatography/Mass Spectrometry Testing Equipment
- Sample Processing
- Spectral Techniques
- Gas Chromatography Spectrometry Testing Equipment
- Gas Chromatography Testing Equipment
- Inductively Coupled Plasma Mass Spectrometry Testing Equipment
- Inductively Coupled Plasma Atomic Emission Spectrometry
- Ion Conductivity Testing Equipment
- Cold Vapor Atomic Absorption Testing Equipment
- Polymerase Chain Reaction Testing Equipment
- Spectrophotometer Equipment
- Auto Sampler Equipment
- Analytical Probes
- High Performance Liquid Chromatography
- Filing Systems
- ELISA Methods
- ELFA Methods
- Microbiology
- Work Procedures
- Standard Methods
- Industry Changes & Related Information

**COMPUTER SKILLS**
- Adobe (PDF, InDesign, Photoshop, Illustrator, etc.)
- Cloud Solutions
- Computer Graphics, Design & Drafting
- Customer Relationship Management (CRM)
Crystal Reports
Financial Software
Microsoft Office Suite
Payroll System
Web Design and Graphics Software Application
ChemStation Software/Application
Total Chrom Software/Application
PeakNet Software/Application
Chromeleon Software/Application
Galaxy Software/Application
Enviroquant Software/Application
Trace Finder Software/Application
Perkin Elmer ICPS Software/Application
Element Laboratory Information Management System
OI Software/Application
Seal Analytical Software/Application
Electronic Deliverables

CONTINUOUS IMPROVEMENT
- Cause and Effect Analysis (Fishbone)
- Lean Process Improvement
- ISO 17025
- Problem Solving
- Productivity Improvement
- Quality Assurance/Quality Control
- Six Sigma Methodology
- Teambuilding
- Corrective Action in Testing
- Leadership Skills
- Process Improvement

HAZARDOUS MATERIALS
- Hazardous Communication
- Labeling - Global Harmonizing System

Safety Training will be limited to 10% of total training hours, per-trainee.

Productive Lab

0 – 24

COMMERCIAL SKILLS
- Microbiology Analysis
- Inorganics Analysis
- Metals Analysis
- Ion Chromatography Analysis
- Organics Analysis
- Food Analysis
- Glassware Use and Cleaning
- Pipette Use and Verification
- Balance and Weights Training
- Element Laboratory Management System
- Instrument Software
- Standard and Reagent Preparation
Note: Reimbursement for retraining is capped at 200 total hours, per-trainee, regardless of method of delivery. PL is capped at 24 hours, per-trainee.
**DELEGATION ORDER**

**RETRAINER - JOB CREATION**

Training Proposal for:

Behavioral & Educational Strategies & Training

Agreement Number: ET17-0328

Approval Date: December 16, 2016

ETP Regional Office: Sacramento  Analyst: K. Mam

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SET</td>
</tr>
<tr>
<td></td>
<td>HUA</td>
</tr>
<tr>
<td></td>
<td>Job Creation Initiative</td>
</tr>
<tr>
<td></td>
<td>Medical Skills Training</td>
</tr>
</tbody>
</table>

| Industry Sector(s): | Healthcare Services |

| Priority Industry: | Yes | No |

| Counties Served: | Stanislaus and San Joaquin |

| Repeat Contractor: | Yes | No |

| Union(s): | Yes | No |

| Number of Employees in: | CA: 103 | U.S.: 73 | Worldwide: 103 |

| Turnover Rate: | 9% |

| Managers/Supervisors: | (% of total trainees) | 0% |

### FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>= Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$82,200</td>
<td>$0</td>
<td>$0</td>
<td>$82,200</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required | $82,200
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Retainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SET HUA Medical Skills Training</td>
<td>MS Didactic, Business Skills, Computer Skills</td>
<td>38</td>
<td>8-200</td>
<td>$600</td>
<td>*$12.00</td>
</tr>
<tr>
<td>2</td>
<td>Retrainee SET HUA</td>
<td>Business Skills, Computer Skills</td>
<td>8</td>
<td>8-200</td>
<td>$600</td>
<td>$17.00</td>
</tr>
<tr>
<td>3</td>
<td>Retrainee Job Creation Initiative Medical Skills Training</td>
<td>MS Didactic, Business Skills, Computer Skills</td>
<td>39</td>
<td>8-200</td>
<td>$1,400</td>
<td>*$12.77</td>
</tr>
</tbody>
</table>

* 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/HUA): $11.70 per hour in Stanislaus and San Joaquin county.

Job Number 2 (SET/HUA): $15.60 per hour in Stanislaus and San Joaquin county.

Job Number 3 (Job Creation): $12.77 per hour in Stanislaus and 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

$0.77 per hour may be used to meet the Post-Retention Wage for Job Number 3.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1 (SET/HUA)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Behavior Technician</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Clinical Assistant</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Stimuli Specialist/Mock School Teacher</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Center Coordinator</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Payroll/HR/Administrative Staff</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2 (SET/HUA)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training Coordinator</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Scheduling Coordinator</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Clinical Translator</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1999 and headquartered in Modesto, Behavioral & Educational Strategies & Training (BEST) (www.bestforautism.com) provides a variety of behavior analytic services to individuals with Autism as well as individuals with developmental disabilities. Patients with Autism Spectrum Disorder ages range from infancy to 18 years. The Company has 2 facilities in Modesto and Salida. Training under this proposal will be for their Salida and Modesto locations.

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.

PROJECT DETAILS

This is BEST’s first ETP Agreement. With recent research findings and advancements in treatment for autism, more contemporary Applied Behavior Analysis (ABA) practices are being utilized to properly treat autistic patients. Training under this proposal will provide staff with the ability to maintain and improve behavior analytic strategies to treat the core deficits and associated features of autism by blending traditional ABA strategies with contemporary ABA practices.

The Company is also focusing on expanding their Early Start program for children under 3 years of age. Addressing autism or developmental disabilities at an early age is crucial in developing foundational capabilities. This will require staff to assess the required treatment strategies and develop a comprehensive plan to address the multiple areas of need. Training under this proposal will enable staff to do their job more effectively.

Retrainee - Job Creation

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

BEST will be expanding their workforce due to the expansion of their insurance based programs which includes center, home-based, and community services. Also, with the expansion of their Early Start program, the Company will require an increase in workforce to be trained to handle younger patients.

BEST has committed to hiring 39 new employees (Job Number 3). The Company will be hiring Behavior Technicians, Clinical Assistants, Payroll/HR/Administrative Staff and a Training Coordinator. 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.

**Medical Skills Training (70%)**

The Panel has established a higher reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model.

Approximately 68 trainees, including Behavior Technicians and Clinical Assistants, will participate in didactic clinical skills training.

Classroom/laboratory training on ABA and autism will be provided by in-house subject matter experts and vendors. Training will ensure staff has skills to implement direct one-to-one ABA methodologies, prompt hierarchy, discrete trial procedures, reinforcement, and behavior management. Training will include Child Abuse Training, Verbal Imitation, Developmental Norms, Handling Older Clients, and Social Engagement Program for Infant/Toddlers.

**Training Plan**

**Business Skills (25%):** This training will be offered to all occupations. Training will focus on efficient business practices to improve workflow processes. Training topics include Stimuli/Material Procedures, Client Specific Goal Development/Design, and Billing/Accounting Procedures.

**Computer Skills (5%):** This training will be offered to all occupations. Training will focus on the Company’s Therapy Practice Management Software. Training topics include Central Reach and Email and Server.

**Commitment to Training**

ETP funds will not displace the existing financial commitment to training. The Company’s current annual training budget of $129,500 is used to provide new hire training, promotional training by job category and continuous improvement 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 and Development Supervisor will oversee the Training Coordinators responsible to implement all training, ensuring the training is accurate and completed. There are five staff members dedicated to scheduling training, enrolling trainees, tracking training hours, and meeting with ETP staff.

**Wage and Retention Modifications**

The trainees in Job Number 1, 2 and 3 work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by 25%. The company’s location in Fresno county qualifies for HUA status.

These trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. The Contractor is requesting this wage modification as follows:
• For Job Number 1 retrainees, the Company is requesting a wage modification from $28.37 to $11.70.

• For Job Number 2, the Company is requesting a wage modification from $28.37 to $15.60.

Full-Time Work Week

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

BEST requests a modification from 35 hours per week to 30 hours per week. Employees are not “temporary” but are employed by BEST on a permanent basis, with quarterly payroll reporting. Employees who work at least 30 hours per week are eligible for full-time benefits. A 30-hour work week is customary for the behavioral health industry and the occupations of Behavior Technicians, Clinical Assistants, Stimuli Specialists/Mock School Teachers, Clinical Translator, and Infant Toddler Coordinators because each client is approved (by the client's insurance company) to participate in the program for a specific number of hours per week (ranging from 5 – 35 hours) at a specific location (e.g. center, schools, in-home) and those hours cannot be changed. Therefore, employees can work anywhere from one – seven hours per day. These schedules are also subject to change with minimal notice due to parent schedule changes, cancellations, etc. Due to those variables, an employee’s full-time schedules ranges from 30-35 hours a week. The Company offers a 30-hour full-time workweek for all employees which allow workers the ability to remain on full-time status even if their work hours drop below 35 hours per week.

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

Trainees may receive any of the following:

MEDICAL SKILLS - DIDACTIC
- Health Insurance Portability and Accountability Act (HIPAA)
- Child Abuse Training
- Mandated Reporting
- Sensitivity in the Home
- Documentation
- Complaint and Grievance Process
- Professionalism
- Communication Temptations/Manding
- Picture Exchange Communication System
- Basic Clinical Skills
- Verbal Imitation
- Expanding Language
- Safety Training for Clinical Setting
- Play Dates
- Community Outtings
- School Sessions
- Infant Toddler Program Introduction
- Handling Older Clients (Basic/Advanced)
- Social Engagement Program for Infant/Toddlers
- Autism
- Developmental Norms
- Reinforcement Beyond the Basics
- Safety Care
- Generalization and Maintenance
- Registered Behavioral Technician
- Joint Attention
- Play Skills
- Social Thinking (Basic/Advanced)
- Pivitol Response Training
- Clinical Professionalism
- Graphing
- Scheduling
- Presentation Skills for Individualized Education Program (IEP)
- Documentation Advances
- Funding Sources

BUSINESS SKILLS
- Office Operations
- Stimul/Material Procedures
- Scanning/Filing Procedures
- Billing/Accounting Procedures
- Inventory/Purchasing Procedures
- Spreadsheet/Data Entry
- Crisis Management
- Assessment
- Client Specific Goal Development/Design
Report Writing

COMPUTER SKILLS
- Central Reach
- Email/Server

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.
DELEGATION ORDER

Training Proposal for:
Bishamon Industries Corporation

Small Business

ET17-0419

Approval Date: January 26, 2017

ETP Regional Office: North Hollywood
Analyst: M. Reeves

CONTRACTOR

- Type of Industry: Manufacturing
- Priority Industry: ☑ Yes ☐ No
- Number of Full-Time Employees
  - California: 48
  - Worldwide: 52
  - Number to be trained: 34
- Out-of-State Competition:
- Special Employment Training (SET): ☑ Yes ☐ No
- High Unemployment Area (HUA): ☑ Yes ☐ No
- Turnover Rate: 11%
- Repeat Contractor: ☑ Yes ☐ No

FUNDING

- Requested Amount: $44,200
- In-Kind Contribution: $30,000
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>Continuous Imp.</td>
<td>34</td>
<td>8-60 0</td>
<td>$1,300</td>
<td>*$16.16</td>
</tr>
</tbody>
</table>

*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 SB Priority
- County(ies): San Bernardino
- Occupations to be Trained: Assembly Worker, Welder, Machine Shop Worker, Plant/Product Engineer
- Union Representation: □ Yes □ No
- Health Benefits: $3.48 per hour

## SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: N/A

## OVERVIEW

Founded in 1986, Bishamon Industries Corporation (Bishamon) opened its 78,000 square-foot manufacturing facility in Ontario 1988. Bishamon manufactures ergonomic material handling equipment for use by worldwide manufacturers and distribution companies. In 1990, the Company introduced the Bishamon EZ Loader, a variable capacity, self-leveling palletizer that revolutionized the manual palletizing industry.

Bishamon earlier introduced several other material handling products of its design, including the EZ Leveler, EZ Veyor, EZ Tilter, Unilift, Optimus Scissor Lift and Lift Pilot.

## Need for Training

Due to several expiring patents, Bishamon is facing even more intense competition in a tight marketplace. The Company is losing market share to both domestic and low-cost foreign
competitors. Bishamon is looking to improve productivity and efficiency and hopes to add a new lower-cost product line by mid-2017.

Training Plan

Bishamon’s workforce is divided into three main disciplines: machining, welding and assembly. The proposed training will focus on Continuous Improvement and product quality. Training will take place at Bishamon’s Ontario facility and will be delivered by in-house subject matter experts.

**Continuous Improvement:** Training will be offered to all occupations. Assembly workers typically have the least experience and will benefit greatly from continuous improvement and quality training modules. Welders will focus on quality improvements, 5S principles and visual management. In the machining area, Bishamon hopes to reduce waste, rework, machine lot sizes, and inventory. The Company’s Engineers must develop a strong understanding of the continuous improvement principles and techniques that best support Bishamon’s manufacturing processes.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 60

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- Quality Management System
  - Definition of Quality: What is Quality
  - Different Methods for Quality Improvements
  - Buddy System for Quality Inspection
  - One-Piece Process Flow and Batch Process
  - Cost of Poor Quality
  - Benefits in Terms of Dollar Saved

- 5S and Visual Management
  - 5S principles (Seiri, Seiton, Seiso, Seiketsu, Shitsuke)
  - Implementation of 5S in Work Stations
  - Presentation of Each Work Station
  - Audit Schedule

- Kaizen Principle (Continuous Improvements)
  - How to Effectively Apply Plan, Do, Check and Act
  - Additional Methods: 5 Whys Analysis and Fishbone Diagram
  - Identify Non-Value Added Processes
  - Goal Setting

- Kanban Pull System
  - Introduction to Inventory Management System
  - Pull System and Push System as MRP
  - Inventory Accuracy
  - Benefits and Obstacles

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:

Blanchard Training and Development, Incorporated dba The Ken Blanchard Companies

Agreement Number: ET17-0376

Approval Date: January 17, 2017

ETP Regional Office: San Diego

Analyst: K. Campion

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraining Veterans</th>
<th>Industry Sector(s):</th>
<th>Services</th>
</tr>
</thead>
</table>

Priority Industry: ☐ Yes ☑ No

| Counties Served: | San Diego | Repeat Contractor: | ☑ Yes ☐ No |

| Union(s): | ☐ Yes ☑ No |


Turnover Rate: 16%

Managers/Supervisors: (12% of total trainees) 12%

FUNDING DETAIL

| Program Costs | $47,976 |
| (Substantial Contribution) | $0 |
| (High Earner Reduction) | $0 |

= Total ETP Funding | $47,976 |

In-Kind Contribution: 100% of Total ETP Funding Required | $119,808 |
# TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>Business Skills, Computer Skills, Continuous Impr.</td>
<td>123</td>
<td>8-200</td>
<td>$360</td>
<td>$16.46</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Veterans</td>
<td>Business Skills, Computer Skills, Continuous Impr.</td>
<td>7</td>
<td>8-200</td>
<td>$528</td>
<td>$16.46</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 24</td>
<td></td>
</tr>
</tbody>
</table>

- **Minimum Wage by County:** $16.46 per hour – 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
  
  Up to $3.40 per hour may be used to meet the Post-Retention Wage.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>JOB 1 RETRAINEES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Support Staff</td>
<td></td>
<td>36</td>
</tr>
<tr>
<td>Client Delivery Support Staff</td>
<td></td>
<td>25</td>
</tr>
<tr>
<td>Operations Staff</td>
<td></td>
<td>14</td>
</tr>
<tr>
<td>Product Development and Marketing Staff</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>Professional Services Staff</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Sales Staff</td>
<td></td>
<td>14</td>
</tr>
<tr>
<td>Supervisor/Manager</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td><strong>JOB 2 - VETERANS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Support Staff</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Client Delivery Support Staff</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Professional Services Staff</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Supervisor/Manager</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1979 and located in Escondido, Blanchard Training and Development, Incorporated dba The Ken Blanchard Companies (Blanchard) (www.kenblanchard.com) is a management consulting company. It provides workplace learning, productivity, performance, and leadership training solutions to companies in a variety of industries across the country. Blanchard reports that its goals are to provide leadership and performance solutions for companies that unleash human potential, create engaged employees and customers, and drive organizational results and profitability. For example, Blanchard’s workplace solutions for customers include organizational and business consulting, executive coaching and mentoring, and on-site training. This proposal is targeted only for Blanchard’s internal staff in Escondido; no trainers or customers will be included.

This is the second Agreement between Blanchard and ETP. In the first Agreement, training focused on new business strategies and initiatives and new software technology. Since then, the Company has gone through a major reorganization to reduce, streamline and enhance its product line. Blanchard also refined its vision and values, and revised its entire sales and marketing processes. Additional training is essential to increase job knowledge and skill, for the new procedures.

NEED FOR TRAINING

Blanchard’s business has changed drastically in the last year. The Company has gone from offering over 100 variations of products to 9 core products, as noted above. The Company now has a more focused “go-to-market” approach to help increase sales and improve customer satisfaction. Sales Staff must be trained in how to offer and sell new products, and how to use the Company’s online learning. Further, Blanchard has adopted a new proposal writing process, and recently launched project management software, all of which requires training for staff.

Some of the proposed Curriculum topics are similar to training under the prior Agreement. These topics are for newly hired employees or trainees who have not participated previously. Courses for returning trainees have been updated with new/different content. There will be no duplication of training.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Higher support costs are also available to reach participants for this program. Blanchard is committed to retraining seven incumbent-worker Veterans who have served on active full-time duty in the Armed Forces (Job Number 2).

Training Plan

Training will be conducted via class/lab and the majority of the training will be provided by in-house instructors. Blanchard may utilize a training vendor if necessary.

Business Skills (30%) – This training will be provided to all occupations. Business skills are needed so trainees can keep pace with current markets and gain understanding of the business and how to better compete. This training will also help trainees gain understanding of the new product offerings for customers, new brand development, and sales merchandising.
Computer Skills (30%) – This training will be provided to all occupations. Trainees will learn to navigate several new project management software and other computer software applications and solutions.

Continuous Improvement (40%) – This training will be provided to all occupations. Trainees need to learn new work processes, organizational development, and professional development job skills.

Commitment to Training
The Company spends approximately $100,000 annually on training which includes new-hire orientation, sexual harassment prevention, on-the-job (OJT) training, Executive level training, company policies and philosophy, mission statements, values, first aid, CPR, fire extinguisher operation, labor laws and legal issues, stress management, violence in the workplace prevention, self-improvement courses and employee relations 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 Talent Engagement Manager will have oversight of this project and will be assisted by an HR Coordinator to schedule training and collect completed training attendance rosters. ETP project administration, including enrolling and tracking all trainees in the ETP Online Systems, will be provided by an administrative subcontractor.

RECOMMENDATION
Staff recommends approval of this proposal.

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0103</td>
<td>Escondido</td>
<td>1/01/14 – 6/30/16</td>
<td>$63,000</td>
<td>$51,081</td>
<td>(81%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES
Blanchard retained Training Funding Source (TFS) in Seal Beach to assist with development of this proposal for a flat fee of $2,900.

ADMINISTRATIVE SERVICES
TFS will also perform administrative services in connection with this proposal for an amount not to exceed 13% of payment earned.

TRAINING VENDORS
To Be Determined
**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8–200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Allocation of Funds and Fiscal Administration
- Capital Expansion
- Marketing Development/Opportunities
- New Brand Development
- Sales Merchandising
- Corporation Administration
- Design Skills
- Program Awareness
- Program Recommendations

**COMPUTER SKILLS**
- Nitro Reader 3
- Wondershare (PDF Maker/Editor)
- Navision
- Xara Extreme, Corel Draw X6
- Microsoft Project
- SAP
- Huddle
- SoftMaker’s FreeOffice (Textmaker, Planmaker, Presentations)
- AnyMeeting

**CONTINUOUS IMPROVEMENT**
- Innovation Development
- Organizational Improvement
- Professional Development and Planning
- Group Development
- Evaluation and Design of Surveys
- Coaching Development

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

Small Business
ET17-0276

Approval Date: December 9, 2016
ETP Regional Office: North Hollywood  Analyst: M. Webb

CONTRACTOR

- Type of Industry: Technology/Other Services
  Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees
  California: 15
  Worldwide: 15
  Number to be trained: 15
  Owner ☒ Yes ☐ No

- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 13%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $15,600
- In-Kind Contribution: $21,840
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>Business Skills, Computer Skills, Continuous Improvement</td>
<td>15</td>
<td>8-60 0</td>
<td>$1,040</td>
<td>*$16.48</td>
</tr>
</tbody>
</table>

*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: $26 SB Priority

- **County(ies):** Los Angeles
- **Occupations to be Trained:** Technical Staff, Sales/Marketing Staff, Consultants Administrative Staff, Manager, Owner
- **Union Representation:** ☑ Yes  ☐ No
- **Health Benefits:** Job #1: $3.93 per hour

**SUBCONTRACTORS**

- **Development Services:** Bonding Enterprises retained Training Funding Source (TFS) of Seal Beach to assist with development of this proposal for a fee of $900.
- **Administrative Services:** TFS will also provide administrative services for a fee not to exceed 13% of the total amount earned.
- **Training Vendors:** N/A

**OVERVIEW**

The marketplace for computer software evolves every four to six months as new programs and software versions (upgrades) are developed. As such, Bonding Enterprises must provide their staff with up-to-date training to identify business needs, recommend the best product and software solutions, and provide support services once the product or system is installed.

Bonding Enterprises continues to increase the number of software options available. New products such as Dynamics 365 Financials/Enterprise, Power BI, and Skype for business will be offered to customers within the next few months.

Business and Computer Skills training will be provided to employees to learn programming features of new software programs. Training will also be provided to improve customer service, system installation, and integration with legacy software/systems. Training will introduce staff to upgrades for over 10 software programs including Dynamics GP/CRM, Office 365, SmartConnect, and Microsoft SQL Server Database Administration. Training will also focus on new sales and marketing strategies.

Training Plan

The proposed training plan will improve employee skills and ability to complete daily tasks more efficiently. Training will be provided on new products and systems, as well as all internal systems utilized by the Company. Bonding Enterprises will use E-Learning as a training delivery type to supplement classroom.

**Business Skills** – Training will be delivered to all occupations to enhance customer service and communication skills, and learn new techniques in marketing/sales. Training will improve employee job performance, management skills, and ability to develop better marketing strategies. Course topics will include, Product Knowledge, Social Media Marketing, and Coaching/Feedback.

**Computer Skills** – Training will be offered to all occupations to increase product knowledge and improve job skills. Trainees will participate in courses such as Dynamics 365, Systems Integrations, and Microsoft Office to learn new upgrades and computer software features.

**Continuous Improvement** – Training will be offered to all occupations to learn proper methods to identify problems, access and analyze business needs, and increase overall efficiency. Training will also improve employee team building skills, workflow, and process control.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab/E-Learning Hours

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting/Billing - Understanding P & L’s
- Budgeting & Financial Management
- Business Development/Sales
- Business Process/Project Management
- Coaching/Feedback
- Communication Skills
- Customer Service/Client Relations
- Digital Marketing
- Interview Skills
- Leadership and Management
- Marketing/Social Media
- Negotiation
- Organizational and Time Management
- Office Administration
- Performance Management
- Product Knowledge
- Small Business Assessment
- Social Media Marketing

COMPUTER SKILLS

- Adobe Creative Suite--InDesign, Photoshop, Illustrator
- Agile
- Cloud Hosting
- Credit Card Merchant Services
- Dynamics CRM
- Microsoft SQL Server Database Administration
- Disaster Recovery
- Dynamics 365/GP/AX/CRM for Manufacturing, Distribution, CPG
- eCommerce
- Managed Services
- Microsoft (Office 365/Project/SharePoint)
- Professional Services Automation
- Payroll/Human Resources
- Systems Integration
- Skype for Business

CONTINUOUS IMPROVEMENT

- Business Process Assessment
- Cost Reduction
• Eliminating Waste, Goal Setting, Improving Workflow
• ISO 9000
• Lean Enterprise
• Problem Solving, Process and Quality Improvement
• Root Cause Analysis
• Statistical Process Control - SPC
• Team Building
• Workflow Mapping

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
DELEGATION ORDER

Retrainee - Job Creation
Training Proposal for:
Bowman & Company, LLP

Small Business
ET17-0373

Approval Date: December 29, 2016

ETP Regional Office: Sacramento     Analyst: W. Sabah

CONTRACTOR

- Type of Industry: Services
  Priority Industry: ☐ Yes ☒ No

- Number of Full-Time Employees
  California: 43
  Worldwide: 43
  Number to be trained: 43
  Owner ☒ Yes ☐ No

- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 3%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $47,916
- In-Kind Contribution: $64,860
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SB &lt;100</td>
<td>Business Skills, Computer Skills, Continuous Impr, Mgmt Skills</td>
<td>43</td>
<td>8-60</td>
<td>$1,012</td>
<td>$20.00</td>
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<tr>
<td>2</td>
<td>Retrainee Job Creation Initiative SB &lt;100</td>
<td>Business Skills, Computer Skills, Continuous Impr</td>
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<td>8-60</td>
<td>$880</td>
<td>$25.00</td>
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<tr>
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<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
</tr>
</tbody>
</table>

- **Reimbursement Rate:** Job #’s 1 and 2: $22 SB Non-Priority
- **County:** San Joaquin
- **Occupations to be Trained:** Administration Staff, Accounting Staff, Frontline Manager/Supervisor, Owner
- **Union Representation:** Yes
- **Health Benefits:** N/A

### SUBCONTRACTORS

- **Development Services:** Propel Consulting Group of El-Dorado Hill assisted with the development of this proposal for a flat fee of $3,593.

- **Administrative Services:** Propel Consulting Group will also assist with administrative services for a fee not to exceed 7.5% of earned funds.

- **Training Vendors:** Thomas Reuters of San Francisco will provide Business Skills and Computer Skills training for a flat fee of $5,000.

### OVERVIEW

Founded in 1949 and headquartered in Stockton, Bowman & Company, LLP (Bowman) (www.cpabowman.com) is an accounting, auditing, tax-consulting and business valuation firm. Services include industry-specific compiling, reviewing, and auditing of financial statements. The Company also assists clients with corporate or general tax planning, cost segregation and financial analyses to improve profitability mitigate risks and manage growth. The Company has a wide range of clients throughout California and the West.

### Need for Training

Bowman’s need for training is driven by new developments in accounting software programs. Previously, accounting firms were mostly paper-based; however, recent changes in accounting...
software have allowed digitization. With this, the Company has implemented Accounting CS software and Trakstart Software. These software programs will allow staff to scan travel logs, receipts, business cards, and customer documents into a single system. Additionally, trainees will receive soft skills to improve customer service. Overall, training will allow employees to develop technical expertise in the new software programs, remain up-to-date on changes within the industry, and provide exceptional customer service.

Retrainee - Job Creation

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

In the last few years, Bowman has experienced 10% growth or more per year and expects at least the same in 2016-2017. Due to this, the Company will expand business capacity by adding newly hired employees. The Company has committed to hiring 5 new employees (Job number 2).

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

Training Plan

Trainees will receive between 8-60 hours of Classroom/Laboratory and E-Learning training. In-house trainers and vendors will provide training. Training will enable the Company to interact with clients, prepare for increasing customer expectations, and support the Company's commitment to long-term success.

Business Skills - Training will be offered to all occupations to help staff effectively manage projects, service clients and manage business. Training topics will include client development, business development, effective communication, relationship building, and business writing.

Computer Skills - Training will be offered to all occupations to enhance computing abilities and increase knowledge of databases, spreadsheets and reports in the new accounting systems. Trainees will become more efficient as they move to paperless software systems. Training topics will include File Flow Paperless software systems, Trackstar software systems, Finance/Accounting Tolls, and research software.

Continuous Improvement - Training will be offered to all occupations to develop decision-making skills, improve business flow, and encourage team collaboration. Training will help employees remain focused on the Company’s goals and will instill leadership values. Training will include planning, work-flow processes, project management, team building, dispute resolution and audit techniques.

Management Skills - Training will be offered to Managers and Supervisors. Training will help staff identify individuals for advancements and motivate staff to be better leaders. Training topics will include leadership, decision making, problem solving, motivating individuals, and performance improvement.

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**
- Client Development
- Firm Administration
- Client Relationship Management
- Effective Communication
- Relationship Building
- Research Techniques
- Presentation Skills
- Customer Service
- New Products and Services

**COMPUTER SKILLS**
- File Flow Paperless Software Systems
- Accounting CS Software (Thompson Reuters)
- Trackstar Software Systems
- Administrative Software
- Excel, Word, Outlook, Powerpoint (Intermediate/Advanced)
- Database Tools
- Finance/Accounting Tools
- Research Software (BNA/RIA/Checkpoint)
- Video Conferencing

**CONTINUOUS IMPROVEMENT**
- Work-Product Improvement
- Scheduling
- Planning
- Work-Flow Processes
- Project Management
- Team Building
- Coaching
- Interpersonal Skills
- Dispute Resolution
- Industry Specific Accounting
- Accounting Methods
- Audit Techniques

**MANAGEMENT SKILLS** (Managers/Supervisors only)
- Project Time Management
- Effective Client Development
- Effective Employee Recruiting
- Leadership
- Problem Solving & Decision Making
- Teambuilding
- Motivating Individuals
- Employee Performance Improvements

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
Training Proposal for:
Bridport-Air Carrier, Inc. dba AmSafe Bridport
Agreement Number: ET17-0354

Approval Date: December 7, 2016

ETP Regional Office: San Diego  Analyst: K. Campion

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraineep</th>
<th>Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Manufacturing Aerospace and Defense</th>
<th>Priority Industry: □ Yes △ No</th>
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</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Orange</td>
<td></td>
<td>Repeat Contractor:</td>
<td>□ Yes △ No</td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>□ Yes △ No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Number of Employees in:
CA: 73  U.S.: 5,830  Worldwide: 5,830

Turnover Rate: 7%

Managers/Supervisors: (13% of total trainees)

FUNDING DETAIL

Program Costs
$63,504

(Substantial Contribution) $0

(High Earner Reduction) $0

Total ETP Funding $63,504

In-Kind Contribution: 100% of Total ETP Funding Required $87,400
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate</td>
<td>Mfgt Skills Business Skills</td>
<td>72</td>
<td>8-200</td>
<td>0</td>
<td>$882</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Computer Skills Continuous Impr.</td>
<td></td>
<td>Weighted Avg:</td>
<td>49</td>
<td>*$16.51</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Hazardous Mat.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*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:
- $16.51 per hour for Orange County

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

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

Up to $2.53 per hour per hour may be used to meet the Post-Retention Wage.

#### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Staff</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>Production Staff</td>
<td></td>
<td>46</td>
</tr>
<tr>
<td>Quality Staff</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Supervisor/Manager</td>
<td></td>
<td>9</td>
</tr>
</tbody>
</table>

### INTRODUCTION

Located in Anaheim, Bridport-Air Carrier, Inc. dba AmSafe Bridport (AmSafe) is a wholly-owned subsidiary of Transdigm Group, Inc. based in Cleveland, Ohio. AmSafe manufactures textile cargo restraint equipment for aircraft and other safety restraint products such as seatbelt airbags, RPG net protection systems, airframe barrier nets, and lightweight cargo nets for the aerospace, defense, specialty and vehicle industries ([www.amsafebridport.com](http://www.amsafebridport.com)). The Company also repairs and overhauls escape slides, life vests and other survival equipment, and manufactures cylinders for escape slides, rafts and oxygen systems.

This is the third Agreement between AmSafe and ETP, and the third in the last five years. The prior Agreements focused on training in process improvements to enhance productivity and quality, integrate new product lines, adapt to new technologies and systems, design a quick turn-around delivery system, and improve customer service. The Company has experienced significant operational changes including the addition of new product manufacturing in the last 12 months, necessitating staff training.

### NEED FOR TRAINING

Prior to December 2015, AmSafe primarily manufactured and repaired survival equipment for aircraft. Subsequently, the Bridport facility in Erie, PA that repaired and manufactured textile
cargo products, was closed, and all manufacturing operations were moved to the Anaheim, CA facility. Now that the Company has transitioned new textile cargo product manufacturing to California, extensive equipment operations, manufacturing processes training and cross-training is necessary to implement these new production lines in an efficient manner, increase production quickly and improve staff product knowledge. Workers need training on repair procedures for new slides and textile products, including training in the changes to the repair scope and requirements.

The need for training is also driven by the implementation of a new, global Enterprise Resource Planning (ERP) system, SyteLine, which was initially implemented for the Anaheim facility at the end of 2015, for the survival equipment operations only. Subsequently, in May 2016, the textile cargo business operations were transitioned over to SyteLine, so that both survival operations and textile cargo operations now operate under the same ERP system. This new system now is integrated throughout the company for all departments including sales, accounting, manufacturing, distribution and after-market service. Therefore, all employees at the Company must be trained in one or more modules of SyteLine, learn the new features and how to navigate within the system, and learn how to export data efficiently. AmSafe projects that the new ERP system will help grow business, increase profitability and efficiency, improving its ability to be more competitive in the worldwide market.

Additionally, some of the proposed Curriculum topics are similar to training under the prior Agreement. These topics are for newly hired employees or trainees who have not participated previously. There will be no duplication of training for the same trainees who were trained in prior contracts.

Training Plan

Training will be conducted via class/lab by in-house instructors. Training vendors may be utilized if necessary, but have yet to be determined.

Manufacturing Skills (35%) – This training will be provided to Production and Quality Staff. Trainees will learn new skills and production processes for the new textile cargo production line for improved workplace efficiencies.

Business Skills (10%) – This training will be provided to all occupations. Trainees will learn Accounting Skills, Businesses Processes, Communication and Sales Skills.

Computer Skills (20%) – This training will be provided to Admin Staff, Quality Staff and Supervisor/Managers to ensure trainees have the skills required to navigate the Company’s new ERP system.

Continuous Improvement (30%) – This training will be provided to all occupations. Trainees will learn quality concepts and continuous improvement techniques including LEAN, Six Sigma, and Kaizen so they can learn strategies that will increase their skills and capabilities for effective problem solving.

Hazardous Materials (Non-Certified) (5%) – This training will be provided to all occupations. Trainees will learn to properly handle, transfer, inventory, account, use and dispose of hazardous materials.
Commitment to Training

The Company spends approximately $75,000 - $85,000 annually on training which includes basic orientation, government compliance, and necessary job skills for minimum proficiency. 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 proposed training will be in new curriculum topics designed to meet AmSafe’s strategic goals for improving its new global ERP operating system and for training in new processes associated with new products.

Human Resources (HR) staff will have oversight of this project. HR Staff will coordinate with department heads to schedule training classes, design and create relevant training content and ensure trainees and trainers are correctly completing training attendance rosters. ETP project administration, including enrolling and tracking all trainees in the ETP Online Systems, will be provided by an administrative subcontractor.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
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<tbody>
<tr>
<td>ET15-0119</td>
<td>Anaheim</td>
<td>7/07/14 – 7/06/16</td>
<td>$68,400</td>
<td>$48,905        (71%)</td>
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</tr>
<tr>
<td>ET12-0304</td>
<td>Anaheim</td>
<td>2/14/12 – 2/13/14</td>
<td>$53,460</td>
<td>$53,460        (100%)</td>
<td></td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

AmSafe Bridport retained Training Funding Source (TFS) in Seal Beach to assist with development of this proposal for a flat fee of $3,900.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined
Class/Lab Hours

8 – 200 Trainees may receive any of the following:

MANUFACTURING SKILLS
- Equipment Operations
- Manufacturing Processes
- Product Design & Development
- Quality Control Practices & Procedures
- Supply Chain Materials Management
- Shipping/Receiving Processes

BUSINESS SKILLS
- Accounting Skills & Payroll processing
- Business Processes & Performance
- Communication Skills
- Customer Service
- Sales Skills

COMPUTER SKILLS
- Microsoft Office-intermediate and advanced
- SyteLine Enterprise Resource Planning (ERP) Application Skills

CONTINUOUS IMPROVEMENT
- AS9100 Quality Skills
- ISO
- Key Metrics & Reporting
- Leadership Skills
- Lean/Six Sigma/Kaizen
- Project Management
- Team Development

HAZARDOUS MATERIALS
- Hazardous Material handling (non-certified)
- Material Safety Data Sheet (MSDS) Procedures

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.
DELEGATION ORDER

Retrainee – Job Creation
Training Proposal for:

Burrtec Waste Industries, Inc.

Agreement Number: ET17-0371

Approval Date: December 29, 2016

ETP Regional Office: North Hollywood

Analyst: M. Paccerelli

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
<th>Services</th>
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<tbody>
<tr>
<td>Retrainee</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Creation Initiative</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SET</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HUA</td>
<td></td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
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</thead>
<tbody>
<tr>
<td>San Bernardino, Riverside, Imperial, Los Angeles</td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
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</tbody>
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|-------------------------|---------|-----------|-----------------|

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>7%</td>
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</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors: (% of total trainees)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
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FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$100,000</td>
<td>$0</td>
<td>$0</td>
<td>$100,000</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $141,570
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SET</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Impr., OSHA 10/30, HazMat, HAZWOPER, Literacy Skills</td>
<td>210</td>
<td>8-200</td>
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<td>$300</td>
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<tr>
<td>2</td>
<td>Retraine SET HUA</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Impr., OSHA 10/30, HazMat, HAZWOPER, Literacy Skills</td>
<td>70</td>
<td>8-200</td>
<td>0</td>
<td>$774</td>
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<tr>
<td>3</td>
<td>Retraine SET Job Creation Initiative</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Impr., OSHA 10/30, HazMat, HAZWOPER, Literacy Skills</td>
<td>40</td>
<td>8-200 20</td>
<td></td>
<td>$400</td>
</tr>
</tbody>
</table>

*It will be made a condition of contract that the 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: $28.37 per hour Statewide
- Job Number 2: $15.60 per hour for San Bernardino, Riverside, and Imperial Counties
- Job Number 3: $12.77 per hour for San Bernardino, Riverside, and Imperial Counties; and $13.73 for Los Angeles County

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe
- Up to $6.37 per hour may be used to meet the Post-Retention Wage in Job Number 1.
- Up to $3.60 per hour may be used to meet the Post-Retention Wage in Job Number 2.
- Up to $3.73 per hour may be used to meet the Post-Retention Wage in Job Number 3.

---

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Number 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Service Representative</td>
<td></td>
<td>10</td>
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</tbody>
</table>
**INTRODUCTION**

Founded in 1955, Burrtec Waste Group (BWG) (www.burrtec.com) is a private-sector solid waste company providing services to residential, commercial and industrial customers in California.

BWG operations are classified into three major categories that are interdependent and complementary to one another – Waste Collection, Processing, and Disposal. These lines of business create a synergy that enables Burrtec to offer state-of-the-art services. Clients include local government.

- **Waste Collection Operations.** BWG operates nine divisions in Southern California. Its core services include solid waste collection, recyclable materials collection and processing, and organic materials collection and processing. Optional services include temporary services, bulky waste collection, used motor oil collection, electronic waste collection, sharps, mulch and compost product sales, and special event services.

- **Processing.** BWG’s processing facilities enable local governments to meet State-mandated diversion responsibilities. When AB 939 was enacted in 1989, BWG identified that processing facilities would be needed and focused on developing such facilities. BWG now operates six processing facilities where recyclables, organic materials (green waste and food waste), and construction & demolition waste are diverted from landfill disposal.

- **Disposal Operations.** As a significant solid waste operator in Southern California, BWG expanded its solid waste operations within the last decade to include landfill operations. In 2008, BWG entered into a long-term contract with the County of Imperial to operate and expand the Salton City Solid Waste Site. BWG’s role encompasses the day-to-day operations of the landfill, design, permitting, and expansion of the site, and the closure/post-closure operations once the landfill reaches capacity.
BWG is requesting ETP funds to train approximately 330 employees of BWG and its affiliates, Yucaipa Disposal, Inc., and Jack’s Disposal, Inc. over the next two years. The Company is eligible for ETP funding under Special Employment Training (SET) provisions for frontline workers.

**PROJECT DETAILS**

**Need for Training**

In 2016, the Company was awarded a new contract by the City of San Bernardino to manage its waste collections operations. This requires the Company to provide specialized training for incumbent workers and new staff.

BWG’s Material Facility Recovery operations are also continuing to grow with the California diversion requirements mandated by AB 939 and AB 341. With this mandate, the Company is now processing more recyclable commodities at its Material Recovery Facilities. Again, this requires upgrade training of incumbent workers and additional staff.

In addition, 85% of its fleet must be converted to alternative fuel vehicles by 2020. Equipment Maintenance Staff need to updated skills to maintain alternative fuel vehicles such as CNG Tank Certifications, ASE Certifications in Alternative Fuels, and Engine Certification.

To keep up with growth, BWG invested $25M to implement Waste Tec, a proprietary customer information management system used to generate and track customer invoicing/billing; work orders, and driver route sheets. It also programs optimal waste collection routes based on customer data. It is a full-featured system for company-specific accounts receivables, reporting, payment collection and routing. BWG seeks ETP funds for the new software training because it is not included in the purchase price.

**Retrainees - Job Creation**

BWG created a second shift at its West Valley Operations this year and will also need to expand its operations at its East Valley and Victorville locations in 2017, to service the new contracts and expanded services discussed above. BWG has committed to hiring and training 40 new Customer Service Representatives, Administrative Staff, Equipment Operators, and Equipment Maintenance Staff.

To be eligible for reimbursement, trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage. Trainees will be hired into “net new jobs” as a condition of contract.

**Training Plan**

**Commercial Skills (50%)** – Training will be delivered to all occupations in good operations practices, equipment operations, paint application techniques, and waste treatment to improve cost and product quality.

**Computer Skills (20%)** – Training will be delivered to Customer Service Representatives and Administrative Staff and will focus on the company’s new software system. Customer Service Representatives and Administrative Staff will also receive training in advanced and intermediate Microsoft Office Suite.
**Continuous Improvement Skills** (10%) – Training will be delivered to all occupations Process Improvement, Root Cause Analysis, and Problem Solving to improve productivity and quality.

**Business Skills** (5%) - Training will be delivered to Customer Service Representative and Administrative Staff and will focus on customer service, accounting/payroll, and negotiation skills.

**Literacy Skills** (5%) - Training will be delivered to Equipment Operators, Equipment Maintenance Staff, Shop Maintenance, and Drivers on properly completing English forms and documentation.

**Hazardous Materials** (5%) - Training will be delivered to Equipment Operators, Shop Maintenance Staff, Equipment Maintenance Staff, and Drivers to ensure that hazardous materials are properly identified, handled, and disposed properly.

**Certified Safety Training** (5%)

- **OSHA 10/30** - This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 or 30 hours of classroom or CBT training. Completion of the training will result in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. Training will be offered to Equipment Maintenance Staff, Shop Maintenance Staff and Equipment Operators to ensure these workers are versed in the prevention of health hazards and safety in the workplace.

- **Hazardous Waste Operations and Emergency Response Standard (HAZWOPER)** - This training is also 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. 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.

**SET/HUA Wage Modification**

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

All trainees in Job Number 2 work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by 15%, under the Panel’s standards. BWG’s locations in San Bernardino, Coachella, and Salton City are in HUA’s. Trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. BWG is requesting this wage modification from $28.37 to $15.60.

**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
- Equipment Operation
- ASE
- Smith System
- Vehicle Operation (Side Loader, Front Loader, Bin Delivery & Roll Off)
- Forklift Training

BUSINESS SKILLS
- Customer Service
- Accounting/Payroll
- Negotiation Skills
- Conflict Resolution

CONTINUOUS IMPROVEMENT
- Process Improvement
- Root Cause Analysis
- Problem Solving

COMPUTER SKILLS
- Microsoft Word, Excel, PowerPoint (Advanced & Intermediate)
- Waste Tec Software

OSHA 10/30 (Certified OSHA Instructor)
- OSHA 10 (requires 10 hours completion)
- OSHA 30 (requires 30 hours completion)

HAZWOPER
- HAZWOPER Instructor-Certified Training (requires completion of certified course) 40 hour and the 8-hour Refresher

HAZARDOUS MATERIALS
- Hazardous Materials Handling
- Hazardous Waste Identification
- Globally Harmonized System
- Hazardous Communication
- Storm Water Pollution Prevention Plan (SWPPP)
- Certified Unified Program Agency (CUPA)
- E-Waste Training
- Spill Prevention
- IIPP
- Acetylene Fuel and Gas Safety
- Battery Handling Changing and Charging
- Bloodborne Pathogen Awareness
- Vehicle Fuels & Fuel Safety

Safety Training cannot exceed 10% of total training hours per-trainee
**LITERACY SKILLS**

- Vocational English as a Second Language (VESL)

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.
DELEGATION ORDER

Training Proposal for:
Cal Sheets LLC

Small Business
ET17-0317

Approval Date: December 6, 2016

ETP Regional Office: Sacramento  Analyst: D. Jordan

CONTRACTOR

- Type of Industry: Manufacturing

- Number of Full-Time Employees
  - California: 74
  - Worldwide: 74
  - Number to be trained: 74

- 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:  $73,112
- In-Kind Contribution:  $65,000
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainees Priority Rate SB &lt;100</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills, OSHA 10/30</td>
<td>74</td>
<td>8 - 60</td>
<td>$988</td>
<td>$15.60</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): San Joaquin
- Occupations to be Trained: Administrative/Support Staff, Technical Staff, Production Staff, Supervisor, Manager
- Union Representation: ☑ Yes ☐ No
- Health Benefits: Job #1: $0.50 per hour

## SUBCONTRACTORS

- Development Services: Sallyanne Monti Consulting of San Francisco assisted with the development of this project for a flat fee of $3,000.
- Administrative Services: Sallyanne Monti Consulting will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

## OVERVIEW

Founded in 1999 and headquartered in Stockton, Cal Sheets LLC (Cal Sheets) is a manufacturing and production company that makes corrugated paper sheets. Cal Sheets sells their products primarily to packaging suppliers, who convert them to finished boxes for their customers. Packaging suppliers are Cal Sheets largest customers. Cal Sheets’ customers include Berry Pack and Calpine which are both full service package manufacturing and production companies. Training will occur at their Stockton location.
Need For Training

Cal Sheets is currently preparing for a new machine installation, in response to increased customer demand for products, such as high-end graphics. The new machine, BHS Dry End Corrugator, requires staff training in quality and efficiency standards, and maintenance. The Supervisors and Managers will also receive training on marketing and management of the new products, and technology tracking upgrades. Cal Sheets is requesting a two-year contract term so that they may have ample time to implement all training phases companywide and ensure all trainees meet the retention period.

Training Plan

Business Skills: Training will be offered to all occupations. Staff will receive training on new sales, marketing, administrative and financial processes related to the new production line. Training will enable Staff to ensure that customer and internal goals are met and sales increase.

Computer Skills: Training will be offered to all occupations. Staff will receive training on new software included with the BHS Dry End corrugator and the onboarding process. Staff efficiency is expected to increase with the new implementation.

Continuous Improvement: Training will be offered to all occupations. Staff will receive training on process improvement, production operations, quality assurance and quality control. Training will also include the implementation of all administrative materials to support production, marketing and sales of the new product. Staff will develop the skills to implement solutions to inefficient practices and be able to deliver excellent customer service.

Manufacturing Skills: Training will be offered to all occupations except Administrative Staff. Staff will receive training on the latest production techniques to reduce waste and production time.

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.

HUA/Modifications

The 74 trainees in Job Number 1 work in San Joaquin County, a High Unemployment Area (HUA) with the unemployment exceeding the state average by 25%. The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department. However, Cal Sheets is not asking for a wage modification.

RECOMMENDATION

Staff recommends approval of this proposal.
Class/Lab Hours

8-60 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Business Management Skills for New Customers & Product Advancements
- Customer Service for New Customers & Product Advancements
- Sales & Marketing for New Customers & Product Advancements

**COMPUTER SKILLS**
- Automated Administrative Materials for New Product Line
- Software Integration as Part of New Machine Onboarding

**CONTINUOUS IMPROVEMENT**
- Continuous Improvement Processes for New Initiatives
- Quality Assurance Alignment for New Products & Advancements

**MANUFACTURING SKILLS**
- Digital Print Technology
- Equipment Operations for Customer Specific Criteria
- Packaging & Fulfillment
- Production and Product Line Advancements

**OSHA - requires certified OSHA instructor**
- OSHA 10 (Requires Completion of 10 Hours)
- OSHA 30 (Requires Completion of 30 Hours)

E-Learning Hours

8 - 60

**BUSINESS SKILLS**
- Business Management Skills for New Customers & Product Advancements
- Customer Service for New Customers & Product Advancements
- Sales & Marketing for New Customers & Product Advancements

**COMPUTER SKILLS**
- Creation of Administrative Materials for New Product Line
- Software Integration as Part of New Machine Onboarding

**CONTINUOUS IMPROVEMENT**
- Continuous Improvement Processes for New Initiatives
- Quality Assurance Alignment for New Products & Advancements
**OSHA - requires certified OSHA instructor**

- OSHA 10 (Requires Completion of 10 Hours)
- OSHA 30 (Requires Completion of 30 Hours)

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 60 total training hours per trainee, regardless of the method of delivery.
DELEGATION ORDER

Retraineec - Job Creation
Training Proposal for:
California Materials, Inc.

Small Business
ET17-0413

Approval Date: January 24, 2017
ETP Regional Office: Sacramento Analyst: K.Mam

CONTRACTOR

- Type of Industry: Construction Services
  Priority Industry: ☑ Yes ☐ No

- Number of Full-Time Employees
  California: 65
  Worldwide: 65
  Number to be trained: 80
  Owner ☑ Yes ☐ No

- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☑ No
- High Unemployment Area (HUA): ☑ Yes ☐ No
- Turnover Rate: 5%
- Repeat Contractor: ☐ Yes ☑ No

FUNDING

- Requested Amount: $99,398
- In-Kind Contribution: $83,900
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate SB &lt;100</td>
<td>Business Skills, Commercial Skills, Computer Skills, Mgmt Skills, PL-Comm Skills</td>
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<td>8-60</td>
<td>$1,352</td>
<td>$16.16</td>
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<td></td>
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<td>Weighted Avg: 52</td>
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</tr>
<tr>
<td>2</td>
<td>Retrainee Priority Rate SB &lt;100 HUA</td>
<td>Business Skills, Commercial Skills, Computer Skills, PL - Comm Skills</td>
<td>7</td>
<td>8-60</td>
<td>$1,326</td>
<td>*$12.12</td>
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<td>0</td>
<td>Weighted Avg: 51</td>
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<td>3</td>
<td>Priority Rate SB&lt;100 Job Creation Initiative</td>
<td>Business Skills, Commercial Skills, Computer Skills, Mgmt Skills, PL–Comm Skills</td>
<td>15</td>
<td>8-60</td>
<td>$780</td>
<td>*$13.22</td>
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<tr>
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<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 30</td>
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</tbody>
</table>

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

- Reimbursement Rate: Job #’s 1-3: $26 SB Priority
- County: San Joaquin
- Occupations to be Trained: Transportation Staff, Shop Mechanic, Machine Operator, Field Manager, Office Staff, Owner
- Union Representation: □ Yes □ No
- Health Benefits: Job #1: $0.56 per hour; Job #2: $0.12 per hour; Job #3: $0.45 per hour

### SUBCONTRACTORS

- Development Services: Propel Consulting Group in El Dorado Hills assisted with development for a flat fee of $7,455.
- Administrative Services: Propel Consulting Group will also provide administrative services for a fee to not exceed 7.5% of payment earned.
- Training Vendors: To Be Determined
OVERVIEW

California Materials, Inc. (CMAT) (www.californiamaterials.com) was founded in 2003 and is headquartered in Stockton. The Company provides construction paving, dumping and rock crushing services to residential and industrial customers throughout California. These services may require working in space restricted areas. They include concrete and asphalt recycling, and mobile rock crushing.

Training under this proposal will be delivered at the Company’s two facilities in Stockton and at various customer sites. This will be CMAT’s first ETP Agreement.

Need for Training

CMAT is experiencing growth due to an increase in residential construction. The Company will need to train employees on products, equipment, and processes in order to efficiently out demand. Employees will be cross-trained on all aspects of equipment operation, sales processes, product identification, product preparation and delivery to ensure consistency.

CMAT uses specialized trucking systems for haul and delivery. Employees will be trained on various truck types, such as Super dumps, In-dumps, and Bottoms dumps. The Company has invested $600,000 on a new Rock Grinder and will be using a new fish oil substance on fleet/equipment for extended maintenance. Training will provide skills for proper operation of this equipment.

Retraineep - Job Creation

CMAT plans to expand its workforce to meet demands in the growing residential market. The Company has committed to hiring 15 new employees (Job Number 3). The Company will be hiring Transportation Staff, Shop Mechanics, and Field Managers.

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage. The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Classroom/Laboratory training and Productive Lab will be provided by in-house subject matter experts and vendors.

**Business Skills:** Training will be offered to Office Staff and the Owner. Training will focus on effectively communicating with prospects and clients. Training topics will include project management, accounts receivable techniques, and accounting principles.

**Commercial Skills:** Training will be offered to all occupations. Training will focus on proper use of all heavy equipment and specialized vehicle fleet. Employees will be cross-trained on job functions and processes. Training topics will include equipment operation, vehicle/equipment inspections, job site awareness, and dump vehicle operations.

**Management Skills:** Training will be offered to Field Managers and the Owner. Training will focus on effectively leading and managing an increase in staff and customer base. Training topics will include time management, team building, and decision making.
Computer Skills: Training will be offered to Office Staff, the Owner, Shop Mechanics and Field Managers. Training will focus on utilizing internal software systems and advanced functions of Microsoft products. Shop Mechanics will be trained on diagnostic software programs to determine repair needs. Training topics will include QuickBooks, E-Maintenance Software, and computer diagnostic training.

Productive Laboratory

Productive Laboratory (PL) trainees may produce goods for profit as a part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

CMAT is requesting PL training for their Machine Operators, Transportation Staff, and Shop Mechanics in Commercial Skills. Equipment to be used during PL includes Color Machines, Wood Grinders, Rock Grinders, Excavators, Bobcats, Bottom Dumps, In-Dumps, Filter Ovens, Diagnostic Tools, and Equipment and Vehicle Repair Tools. Due to the nature of the Company’s services, certain training cannot be replicated in a Class/Lab environment. PL training will allow practical, real-world experience in a working environment.

The Company is requesting a trainer-to-trainee ratio of 1:3 since job duties requires 2-3 employees executing tasks. The 1:3 ratio will allow trainees to achieve competency and proficiency in a timely manner.

Training will be taught by subject-matter experts with demonstrated knowledge and expertise in the field. Instructors will monitor and assess trainees before they are deemed competent for each piece of equipment. PL will be capped at 24 hours per trainee.

High Unemployment Area

The 80 trainees in Job Number 1-3 work in San Joaquin County, a High Unemployment Area (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.

➤ Wage Modification

CMAT is requesting the HUA wage modification for the 7 trainees in Job Number 2, from $16.16 per hour to $12.12 per hour.

RECOMMENDATION

Staff recommends approval of this proposal.
# Exhibit B: Menu Curriculum

## Class/Lab Hours

8-60 Trainees may receive any of the following:

### BUSINESS SKILLS
- Customer Service
- Communication Skills
- Project Management
- Business Performance
- Time Management
- Accounts Receivable Techniques
- Accounts Payable Techniques
- Construction Regulations Training
- Accounting Principles
- Sales Techniques
- Product Training

### COMMERCIAL SKILLS
- Equipment Operation (Loaders, Crushers, etc.)
- Tool Operation
- Fish Oil Disbursement
- Preventative Maintenance
- Vehicle/Equipment Inspections
- Vehicle/Equipment Repair Techniques
- Forklift Training
- Commodity Identification & Handling
- Dump Vehicle Operations
- Job Site Awareness
- Storm Water Training
- Safety Procedures

### COMPUTER SKILLS
- QuickBooks
- “Haul It” Recycling Software
- Intermediate/Advanced Microsoft Excel
- E-Maintenance Software Training
- Computer Diagnostic Training
- GPS Installation Training

### MANAGEMENT SKILLS (management trainees only)
- Time Management
- Team Building
- Decision Making
- Leadership & Motivation
- Professional Communication (Language & Written)

Safety Training is limited to 10% of total training hours per-trainee
Productive Lab Hours

0-24

**COMMERCIAL SKILLS** (1:3 trainer-to-trainee ratio)
- Equipment Operation (Loaders, Crushers, etc.)
- Tool Operation
- Fish Oil Disbursement
- Preventative Maintenance
- Vehicle/Equipment Inspections
- Vehicle/Equipment Repair Techniques
- Forklift Training
- Commodity Identification & Handling
- Dump Vehicle Operations
- Job Site Awareness
- Storm Water Training

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. PL is capped at 24 hours per-trainee.
Training Proposal for:  
Calmont Engineering & Electronics Corp.

Small Business  
ET17-0324

Approval Date: January 4, 2017  
ETP Regional Office: San Diego  
Analyst: H. Bernard

CONTRACTOR

- Type of Industry: Manufacturing  
  Aerospace and Defense  
  Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees  
  California: 35  
  Worldwide: 35  
  Number to be trained: 35  
  Owner ☒ Yes ☐ No

- Out-of-State Competition: NAICS Code Eligible  
- Special Employment Training (SET): ☐ Yes ☒ No  
- High Unemployment Area (HUA): ☐ Yes ☒ No  
- Turnover Rate: 10%  
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $20,020  
- In-Kind Contribution: $21,898
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>Business Skills, Computer Skills, Continuous Improv, Manufacturing Skills, HazMat</td>
<td>35</td>
<td>8 - 60</td>
<td>0</td>
<td>$572</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Class / Lab</th>
<th>CBT</th>
<th>Weighted Avg:</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>22</td>
</tr>
</tbody>
</table>

*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 SB Priority
- County(ies): Orange
- Occupations to be Trained: Production Staff, Administrative Staff, Supervisor, Manager, Owner
- Union Representation: ☑ Yes ☐ No
- Health Benefits: $2.97 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source assisted with development for a flat fee of $1,500.
- Administrative Services: Training Funding Source will also assist with administration for a fee not to exceed 13% of payment earned.
- Training Vendors: N/A

OVERVIEW

Calmont Engineering and Electronics Corp. (Calmont) (www.calmont.com), located in Santa Ana, designs and manufactures precise, highly engineered custom wire, cable and extruded shapes for four major areas: the medical & aerospace industries, sensors and robotics. Calmont’s products are engineered to meet each customer’s unique requirements. Customers include Medical, aerospace/military, sensors and robotics, and cable assembly houses.

Need for Training

This will be Calmont's second ETP Agreement within the last five years. During the first ETP Agreement (ET15-0154), Calmont focused heavily on new software systems and job quotes.
As a result, the Company has been able to implement new software system and significantly reduce the lead times for job quotes from 2 days to half a day. For the current project, Calmont will focus on new equipment and reducing job lead times. Trainees who received training under the last ETP Agreement will not receive the same training under this Agreement.

To be competitive, Calmont must manufacture high-quality, technologically up-to-date products. The Company must also quickly adapt to meet customer preferences, demands and requirements. To do this, the Company will be purchasing a new extruder machine, a laser mic and a network analyzer in 2017. The extruder and laser mic are newer models of existing machines and the network analyzer is a completely new piece of equipment. The equipment will automate the Company’s processes and allow production staff to work more than one machine at a time. Staff must be trained to fully implement the automation of equipment. Additionally, the Company is seeking to incorporate more data logging into its standard operating procedures. Data logging is a process that utilizes machine captured data for quality assurance. Data logging training will ensure production staff can interpret data and execute required changes to ensure products meet customer specifications.

The Company is also seeking to reduce lead times for the completion and delivery of products. In the past it typically took the Company 6-8 weeks to manufacture a product. In August, the Company implemented an initiative to reduce lead times for some products by 1-2 weeks. Now, the Company plans to shorten lead times for all products. This requires considerable training to ensure staff can adapt to shorter production times.

**Training Plan**

All training under this project will be delivered via classroom/laboratory training by in-house trainers.

**Business Skills:** Training will be offered to all occupations. Training will include leadership for Managers and Supervisors to ensure that as the Company goes through changes, management staff can make the right choices. It will also include sales and marketing training for administrative and sales staff and finance/accounting procedures for administrative staff.

**Computer Skills:** Training will be offered to all occupations. Many of the company software systems have been updated, and staff requires training. This includes the CableBuilder software for costing and quotes, calibration management software and Material Requirements Planning Expandable system.

**Manufacturing Skills:** Training will be offered to Production Staff. This training will include good manufacturing techniques, equipment operation and maintenance, and other critical skills. Training will reduce waste and lead times, improve quality production, and close skills gaps while expanding the Company’s manufacturing capabilities.

**Continuous Improvement:** Training will be offered to all occupations and will include Lean Manufacturing, 5S, Process Improvement, AS9100C, and International Trafficking in Arms Regulations. These training sessions are expected to improve manufacturing processes and reduce waste.

**Hazardous Materials:** Training will be offered to Production Staff, Managers, and Supervisors. Training is critical to ensure proper handling of materials. Training will include waste/spill operations and emergency response.
Modifications – Request for a Two Year Term

The Company routinely experiences unpredictable surges in production as customers place customized orders. It is difficult to forecast workloads. Calmont plans to schedule training around the influx of new orders. The Company’s in-house trainer will work with the production staff during the lulls of production to ensure all training goals are met. As such, the Company is requesting a two-year contract term to ensure adequate time for training.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0154</td>
<td>Santa Ana</td>
<td>07/07/2014–07/06/2016</td>
<td>$35,230</td>
<td>$20,334</td>
<td>(58%)</td>
</tr>
</tbody>
</table>

ET15-0154: Calmont delivered more training hours than were approved in the ETP Agreement. However, the Company’s failure to properly document training resulted in poor performance.

To improve performance, the Company has dedicated one in-house trainer to schedule, perform and oversee documentation for all training associated with the ETP project. The Company has a detailed training plan in place. Managers will be briefed on the importance of training and proper training documentation. The Company will hold weekly Manager meetings to discuss training and ensure that all recordkeeping standards are met. This proposal has been right-sized to reflect earnings from the previous Agreement.
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 60 Trainees may receive any of the following:

BUSINESS SKILLS
- Coaching Skills
- Finance/Accounting Procedures
- Leadership Skills
- Product Knowledge
- Sales and Marketing
- Planning & Project Management
- International Traffic in Arms Regulations (ITAR)
- Standard Operating Procedures

COMPUTER SKILLS
- Cablebuilder (Cable Design Software)
- Calibration Manager
- Cost Center Analysis Software
- Expandable (MRP Software)
- Payroll Processing

CONTINUOUS IMPROVEMENT
- AS9100c
- Lean Manufacturing Concepts
- Problem Solving
- Process Improvement
- 5S

HAZARDOUS MATERIALS
- Emergency Clean Up
- Hazardous Materials Handling
- Registration, Evaluation, Authorization and Restriction of Chemical Substances

MANUFACTURING SKILLS
- Equipment Operation, Maintenance & Troubleshooting
- Good Manufacturing Processes
- Quality Assurance Equipment
- Proper Inspection Tool Selection
- Industry Accepted Inspection Techniques
- Proper Care of Inspection Tools
- Data Logging

Safety Training will be limited to 10% of total training hours per-trainee.

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:
Center for Social Dynamics

Small Business
ET17-0364

Approval Date: January 10, 2017

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

CONTRACTOR

- Type of Industry: Healthcare
  Services
- Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees
  California: 71
  Worldwide: 71
- Number to be trained: 64
  Owner ☐ Yes ☒ No

- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 5%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $99,840
- In-Kind Contribution: $329,670
## TRAINING PLAN TABLE

<table>
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<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>MS Didactic, MS Clinical with Preceptor, Business Skills, Computer Skills</td>
<td>43</td>
<td>8-60 0</td>
<td>$1,560</td>
<td>$21.28</td>
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<td></td>
<td>Medical Skills Training Priority Rate SB &lt;100</td>
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<td>Weighted Avg: 60</td>
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</tr>
<tr>
<td>2</td>
<td>Retrainee SB &lt;100 Priority Rate Job Creation Initiative Medical Skills Training</td>
<td>MS Didactic, MS Clinical with Preceptor, Business Skills, Computer Skills</td>
<td>21</td>
<td>8-60 0</td>
<td>$1,560</td>
<td>$20.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #’s 1 and 2: $26 SB Priority
- County(ies): Alameda, Solano, Santa Clara, Sacramento, San Mateo, Santa Cruz, Stanislaus
- Occupations to be Trained: Program Coordinator, Program Developer, Clinical Supervisor, Behavioral Specialist
- Union Representation: ☑ Yes ☐ No
- Health Benefits: Job #1 only: $1.28 per hour

## SUBCONTRACTORS

- Development Services: Training Refund Group in Anaheim assisted with development for a flat fee of $5,000.
- Administrative Services: Training Refund Group will also perform administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: N/A

## INTRODUCTION

Center for Social Dynamics (CSD) (www.centersocialdynamics.com) was founded in 2012 in Oakland, where it is headquartered. The Company works with individuals with autism from early intervention through adulthood to assist them in developing skills to maximize social participation and maintain as much independence as possible. The Company uses a customized, evidence-based health care model developed from leading practitioners in the field. Training will take place at four North and South Bay Area CSD offices (Oakland, Vallejo, Gilroy, and Santa Clara) for trainees from eight offices.
PROJECT DETAILS

A Centers for Disease Control study in 2012 states that Autism has increased 120% over the last 15 years, from 1 in 150 to 1 in 68. According to the National Research Council, there is a shortage of medical professional expertise and experience in the Autism field. Additionally, the passage of California legislation SB126 in 2013 requiring insurance carriers to include medical services for Autistic patients is increasing demand. Consequently, the Company has expanded statewide, growing to over 180 employees in just four years of existence.

CSD’s request for ETP funds correlates with this growth in demand for Autism related services. Treatment is standardized by insurance providers and quality is monitored rigorously by insurance providers, the Board of Behavioral Analysis, CSD, and even patients’ parents to ensure quality medical care. This proposal will prepare new and existing allied healthcare professionals with standardized and upgraded skills to provide competent and safe patient care. The vocational skills provided will also meet the needs of a constantly changing healthcare system.

Retraineem - Job Creation

CSD will be expanding business capacity by hiring new employees to meet increasing demand. The Company has committed to hiring 21 new employees (Job Number 2). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

This proposed training includes Medical Skills Training (Didactic and Clinical Preceptor), for frontline clinicians including supervisors. For the Curriculum, CSD has combined findings from numerous leading researchers to develop a curriculum that reflects best-practice, evidence-based treatments that meet or exceeds insurance provider standards. Training will be delivered by in-house experts.

Computer Skills (5%): Training will be offered to all occupations. As technology evolves, new programs are developed to assist with patient care and quality metrics. Training will keep the workforce proficient in documentation and the electronic healthcare recordkeeping. Course work will include software applications designed to meet State and Federal requirements for medical records.

Business Skills (10%): Training will be provided to all occupations. CSD relies heavily on high performance workplace teamwork. Consequently, every employee is expected to display leadership in carrying out their service roles with patients. A large component in the treatment of Autism includes the development of strong communications skills, trust in communities, and gathering of information. Additionally, the implementation of new forms of treatment requires periodic training to evaluate and ensure the continuity of care. Training will lead to improvements in the development and evaluation of evidence based practices in the treatment of Autism.

Medical Skills Training

The Panel has established a priority reimbursement rate for Healthcare Allied Healthcare Industries to upgrade training, recognizing the higher cost of delivery for the Medical Skills model, particularly the Preceptor training.
**MS Didactic** (45%): Training will be offered to all occupations. Trainees will benefit by staying current with new trends. Ongoing education also helps staff remain proficient in their specialties. Topics include implementation tools & techniques, autism treatment, and reviews on neurodevelopment.

**MS Clinical with Preceptor** (40%): Training will be offered to all occupations. Classes will be provided mainly by the Clinical Supervisor and Program Developers using a train-the-trainer model to expand throughout the organization. Clinical Preceptor allows trainees the opportunity to learn new essential skills under close supervision. By observing the experienced clinician in action, trainees will receive hands-on experience to aid learning. Training will be validated by an experienced supervising Clinician in small groups not exceeding a 1:3 trainer-to-trainee ratio.

**Special Employment Training (SET) Wage Modification**

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage 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. CSD requests this wage modification from $28.37 to $21.28 for trainees in Job Number 1 because the Panel recognizes Healthcare to be a priority industry. Since Job Number 2 is eligible for the Standard New Hire Minimum Wage under Job Creation rules, a waiver is not being requested for Job Number 2.

**High Unemployment Area**

CSD’s trainees located in Vallejo work in a High Unemployment Area, a region 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. However, CSD is not asking for a wage and/or retention modification.

**Commitment to Training**

CSD has a company-wide annual training budget of approximately $100,000 for training as employee orientation, diversity training, general safety training, sexual harassment prevention, and conflict resolution 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 begin upon contract approval and will be conducted to trainees from eight of the nine company facilities. Additionally some training, especially Medical Preceptor training, may take place at patients’ homes throughout California where CSD staff are working in the field. CSD has developed internal administrative procedures to capture training using rosters to be completed according to ETP guidelines. Also, CSD has contracted with Training Refund Group to provide administrative support and recordkeeping throughout the term of this ETP Agreement.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8-60 Trainees may receive any of the following:

MEDICAL SKILLS TRAINING - DIDACTIC
- Supporting and Collaborating with Families in Treatment
- A Neurodevelopmental, Interdisciplinary Understanding of Autism & Treatment
- Typical Development Etiology
- Evidence-Based Autism Treatment
- CSD’s Integrated Treatment Approach: Implementation Tools & Techniques
- Implementing CDS’s Video Review to Enhance Treatment & Improve Outcomes

MEDICAL SKILLS TRAINING – CLINICAL PRECEPTOR (1:3 Ratio)
- Key Treatment Concepts
  - Integration of Concepts and Techniques
  - Advanced Neurodevelopmental Understanding of Autism & Core Deficits
  - Introduction of Autism Spectrum Disorder Pivotal Skills Checklist
  - Effectively Prioritizing Pivotal Communication and Social Skills in Treatment While Recognizing and Building Upon Client Abilities and Strengths
  - Introduction of ASD Foundational Treatment Strategies Checklist
  - Application of ASD Pivotal Skills Checklist to Treatment Session Video Clips to Enhance Ongoing Assessment and Treatment Planning
  - Implementing Evidence-Based Approaches (Early Start Denver Model, Pivotal Response Treatment, Social Communication Emotional Regulation Transaction Support) to Improve Communication, Social Interaction and Behavior
  - Using Self-Guided Video Feedback to Improve Treatment Outcomes

- CSD Implementation Coaching
  - Analysis of Video Using ASD Pivotal Skills Checklist
  - Analysis of Video Using Foundational Treatment Strategy Checklist
  - Practical Strategy
  - Coaching During Treatment Sessions

BUSINESS SKILLS
- Leadership

COMPUTER SKILLS
- Medical Recordkeeping
  - Scheduling
  - Billing

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
Central Valley Training Center, Inc.

Small Business
ET17-0350

Approval Date: December 8, 2016

ETP Regional Office: Sacramento

Analyst: K. Smiley

CONTRACTOR

- Type of Industry:
  - Services
  - Healthcare
  - Priority Industry: □ Yes ☒ No

- Number of Full-Time Employees
  - California: 84
  - Worldwide: 84
  - Number to be trained: 84
  - Owner: □ Yes ☒ No

- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes □ No
- High Unemployment Area (HUA): ☒ Yes □ No
- Turnover Rate: 5%
- Repeat Contractor: □ Yes ☒ No

FUNDING

- Requested Amount: $99,792
- In-Kind Contribution: $100,000
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineer SB &lt;100</td>
<td>Business Skills, Computer Skills,</td>
<td>84</td>
<td>8-60</td>
<td>$1,188</td>
<td>*$15.60</td>
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<tr>
<td></td>
<td>SET</td>
<td>Commercial Skills</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>HUA</td>
<td>Weighted Avg: 54</td>
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</tr>
</tbody>
</table>

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

- Reimbursement Rate: $22 SB Non-Priority
- County(ies): San Joaquin, Fresno, Stanislaus, Merced, Tulare
- Occupations to be Trained: Instructor, Program Coordinator, Program Director, Administrative Staff
- Union Representation: ☐ Yes, ☒ No
- Health Benefits: $1.80 per hour

SUBCONTRACTORS
- Development Services: Propel Consulting Group of El Dorado Hills assisted with development services for a flat fee of $7,484.
- Administrative Services: Propel Consulting Group will also assist with administration for a fee not to exceed 7.5% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW
Founded in 1982 and located in Stockton, Central Valley Training Center, Inc. (CVTC) provides behavior management and life skills to people with intellectual disabilities. CVTC developed one of the “First Day Programs” located in California, targeted to specifically serve and support individuals who may need behavioral management and life skill services. All of CVTC’s eight locations in San Joaquin, Fresno, Stanislaus, Merced, Tulare will participate in training.

PROJECT DETAILS
Within the last two years, the state of California has changed the criteria for the types of individuals accepted under state sponsored behavioral therapy and management programs.
Individuals with behavioral disabilities who previously received therapy and support no longer qualify for these services. This change has caused an increase in CVTC clients with aggressive behavior disabilities. To ensure trainees have the skills to work with aggressive clients, CVTC has developed a Registered Behavioral Technician (RBT) training program for staff. This RBT training program is an internal training program designed to build upon principles that RBT’s have gained during certification and focus on treatment plans for clients with aggressive behaviors. RBT’s are registered paraprofessionals who practice under the supervision of a Board Certified Behavioral Therapist (BCBT).

CVTC will be the first in the industry to provide RBT training across the board. The Company will “fill the gap” between the BCBT and non-licensed professionals, creating a highly trained team. This training is critical for workers to support the more aggressive behaviors coming into the CVTC Programs. Those receiving the RBT training will work directly under, and be closely monitored by BCBTs to ensure trainees are competent.

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

All trainees work in High Unemployment Areas (HUA), with unemployment exceeding the state average by 15%. The Company’s locations in San Joaquin, Stanislaus, Fresno, Tulare and Merced counties qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. CVTC is requesting this wage modification for trainees.

Training Plan
Training will be provided by in-house experts and vendors via class/lab in the following:

**Business Skills:** Training will be offered to all occupations to ensure customer satisfaction and increase consistency between facilities. Courses will include Communication, Customer Service and Project Management.

**Commercial Skills:** Training will be offered to Instructors, Program Coordinators and Administrative Staff to increase knowledge of patient care and aggressive patient procedures. Courses will include Behavioral Support, Behavior Tracking and Documentation, Individual Program Development and Non-Crisis Intervention.

**Computer Skills:** Training will be offered to all occupations in on Microsoft Office Suite, Therap Consumer Management (treatment plan software) and Kronos HR/Business Software. Training will ensure competency in all software programs.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-60  Trainees may receive any of the following:

BRAINOSSE SKILLS
- Communication Skills
- Project Management
- Customer Service
- Professionalism
- Leadership
- Team Building

COMMERCIAL SKILLS
- Behavioral Support
- Non-Crisis Intervention
- Social Effectiveness
- Registered Behavior Technician
- Functional Assessment
- Medical Skills
- Report Writing
- Behavior Tracking and Documentation
- Individual Program Development

COMPUTER SKILLS
- Therap Consumer Management
- Microsoft Office Suite
- Office 365 Cloud Based Servers/Software
- QuickBooks Accounting Software
- Kronos HR/Business Software

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
Training Proposal for:
Digital Media Management Inc.

Small Business

ET17-0367

Approval Date: January 11, 2017

ETP Regional Office: North Hollywood  Analyst: M. Niquet

CONTRACTOR

• Type of Industry: Services

• Number of Full-Time Employees
  California: 49
  Worldwide: 51

• Number to be trained: 12

• Owner  Yes  No

• Out-of-State Competition: No OSC
• Special Employment Training (SET):  Yes  No
• High Unemployment Area (HUA):  Yes  No
• Turnover Rate: 6%
• Repeat Contractor:  Yes  No

FUNDING

• Requested Amount: $9,240
• In-Kind Contribution: $13,200
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100 SET</td>
<td>Continuous Impro, Mgmt Skills</td>
<td>12</td>
<td>8-60 CBT</td>
<td>$770</td>
<td>$28.37</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: $22 SB Non-Priority
- County: Los Angeles
- Occupations to be Trained: Partners, Directors, Supervisors/Managers
- Union Representation: ☐ Yes ☒ No
- Health Benefits: Up to $1.15 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Formed in 2010 and located in Beverly Hills, Digital Media Management Inc. (DM2), (www.digitalmediamanagement.com) is a full service media consulting agency. DM2 manages clients' social media and helps create campaigns that build a following and establish brand identity. The Company also creates websites and logos. In 2015, DM2 started an e-commerce department called CZND, launched specifically so clients can sell products they designed. Customers include individuals and movie studios. This will be DM2’s first ETP Agreement.

Need for Training

Rapid growth has established a need for training throughout the organization, especially for newly promoted senior staff. Due to lack of training, senior staff are unprepared to lead their teams efficiently and effectively. Currently, managers are unable to convey critical information to their teams and other departments due to lack of communication skills, causing delays in daily duties and responsibilities which negatively impacts business. The Company has lost potential new clients and business and workers have experienced decreased morale. The Company has developed a comprehensive training plan to address management needs as many employees lack management experience. Training will focus on managing teams and leading projects effectively, including skills in leadership, decision-making, teambuilding, motivation and communication.
Training Plan

Training will be delivered by a combination of in-house subject-matter experts and vendors. The Operations Manager will coordinate, track and schedule all training.

Continuous Improvement - Training will be offered to all occupations. Training is designed to maximize worker productivity through the implementation of process improvements.

Management Skills - Training will be offered to all occupations. Training will better equip managers to lead their staff effectively by communicating clearly, delegating effectively and motivating. Training will help create a more harmonious work environment and maximize worker productivity.

Special Employment Training

The Company is eligible for ETP-funded training through the Special Employment Training (SET) program. 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.
Exhibit B: Menu Curriculum

Class/Lab Hours
8-60

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT
  • Project Management

MANAGEMENT SKILLS (management trainees only)
  • Leadership
  • Decision Making
  • Teambuilding
  • Motivation
  • Communication

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
Panel Amendment #2 for:
Diversified Communications Services, Inc.
Agreement Number: ET16-0243

Approval Date: January 25, 2017
Amendment Effective Date: November 8, 2016

ETP Regional Office: San Diego
Analyst: H. Bernard

CURRENT PROJECT PROFILE

Contract Industry
Type: SB <100 Retrainees
Priority/Retrainees

Industry Sector(s):
Communication
Construction

Counties Served: Orange
Repeat Contractor: ☒ Yes ☐ No
Priority Industry: ☒ Yes ☐ No

Union(s): ☐ Yes ☒ No

Current Contract Term: November 2, 2015 to November 1, 2017
Substantial Contribution: ☐ Yes ☒ No

CURRENT FUNDING

Current Funding
$49,920

AMENDMENT FUNDING

Requested Funding
$33,280

Total Funding
$83,200
**AMENDMENT TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description (By Contract Type)</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Priority/SB&lt;100</td>
<td>Business Skills, Commercial Skills, Continuous Impr, HazMat, OSHA 10/30</td>
<td>64</td>
<td>8 - 60 0</td>
<td>$1,300</td>
<td>*$16.02</td>
</tr>
</tbody>
</table>

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

**Minimum Wage by County:** $16.02 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

Up to $2.00 per hour may be used to meet the Post-Retention Wage.

**INTRODUCTION**

Formed in 1987, Diversified Communications Services, Inc. (DCS) is a full-service Radio Frequency contractor. Located in Brea, this small business provides a variety of innovative solutions to the telecommunication and broadband industries for customers located inside and outside of California.

**AMENDMENT DETAILS**

The Company has experienced significant change and growth since its proposal was approved in October 2016. New business includes BNSF Railroad (install microwave towers along its railway system in California) and State of Arizona (install wireless water meters in various cities). The Company has also seen a surge in service contracts for Distributed Antennae Systems, which provide wireless services within an area or structure.

To handle expansion, DCS recently hired 12 employees, and needs to provide high quality training in products and technologies. This includes training on Confined Space Training, RF Awareness, ARC Flash Training, Crane Rigging and Signaling, Fiber Testing, Hazardous Materials and OSHA 10.
This additional training will ensure staff receive skills needed to work on new projects and learn the Company’s policies and procedures. However, the Company is not requesting changes to the Current Curriculum.

To cover this additional training, the Company seeks an increase in funding of $33,280 (from $49,920 to $83,200). This will increase the Average Cost per Trainee by $520 (from $780 to $1,300) for Job Number 1. DCS has already exhausted current funding. (See Current Contract Performance table, below.) This will be for essentially the same trainees in Job Number 1, effective upon approval.

**SUMMARY OF PRIOR MODS/AMDS**

Modification #1: Increased the Term End date by 1 year (11/01/2016 to 11/01/2017)

**RECOMMENDATION**

Staff recommends approval of this Amendment.

**CURRENT CONTRACT PERFORMANCE**

The following table summarizes performance by DCS under the current ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees Enrolled</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0243</td>
<td>$49,920</td>
<td>11/02/2015–11/01/2017</td>
<td>70</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Based on ETP Tracking Systems, DCS has provided 1,709 eligible hours of training for potential earnings of $44,434 (89% of the Agreement amount). The Contractor projects final earnings of 100% by January 2017 based on training in progress.
Training Proposal for:
Diving Unlimited International, Inc.

Small Business
ET17-0402

Approval Date:  January 24, 2017

ETP Regional Office: San Diego  Analyst: K. Campion

CONTRACTOR

- Type of Industry: Manufacturing
- Priority Industry: Yes  No
- Number of Full-Time Employees
  California: 62
  Worldwide: 62
  Number to be trained: 55
- 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: $25,740
- In-Kind Contribution: $26,055
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SB &lt;100 Priority Rate</td>
<td>Business Skills, Mfg Skills, Computer Skills, Continuous Improv.</td>
<td>55</td>
<td>8-60</td>
<td>0</td>
<td>$468</td>
</tr>
</tbody>
</table>

*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 SB Priority
- **County(ies):** San Diego
- **Occupations to be Trained:** Administrative Staff, Customer Service Staff, Production Staff, Supervisor/Manager, Owner
- **Union Representation:** ☑ Yes, ☒ No
- **Health Benefits:** $2.02 per hour

**SUBCONTRACTORS**

- **Development Services:** Training Funding Source (TFS) in Seal Beach assisted with development for a flat fee of $1,400.
- **Administrative Services:** TFS will also provide project administrative services for an amount not to exceed 13% of payment earned.
- **Training Vendors:** To Be Determined

**OVERVIEW**

Founded in 1963 and located in San Diego, Diving Unlimited International, Inc. (DUI) ([www.dui-online.com](http://www.dui-online.com)) designs and manufactures custom drysuits and systems, hot water suits, waterproof bags and other equipment and thermal protection for divers such as zipseals, gloves and boots. The Company sells worldwide to sport divers and commercial divers. Its products are also used for military operations.

**Need for Training**

This will be the Company’s second proposal and second in the last five years. In the prior Agreement, DUI needed training to increase sales revenues, reduce lead times, and improve the quality of its products. The proposed training project will focus on implementing Goldmine contact management software, Lean manufacturing techniques, and 5S Continuous Improvement. The Company will also be training on new production equipment.
Some of the proposed Curriculum topics are the same or similar to courses under the prior Agreement. These courses are offered again for newly hired employees or trainees who have not participated previously. Returning trainees participating in similar courses will receive updated content. There will be no duplication of training.

The Company recently purchased and installed several pieces of machinery (wire-laying, CNC machine and tape-heating) and implemented new contact management software – Goldmine. Training will be delivered for operation of this new equipment and software.

Additionally, DUI has been designing and selling new products, such as new kinds of regulators, buoyancy compensators and fins, to compete in the global marketplace. Training will be required for manufacturing and product support.

Training Plan

All training will be conducted via class/lab. In-house instructors will conduct the majority of the training. Vendors may be utilized during the term of the Agreement but have yet to be identified.

**Business Skills** – Training will be provided to all occupations to help trainees build customer loyalty, learn key customer expectations, and understand communication and negotiation channels. Trainees will also receive sales/marketing and product knowledge skills.

**Manufacturing Skills** – This training will be provided to Production Staff and Supervisor/Managers to help trainees work with new equipment, ensure on-time deliveries and become responsive, flexible and fast on the production line.

**Computer Skills** – This training will be provided to all occupations based on job functions to learn how to navigate in Goldmine contact management software. Trainees will learn to manage the sales and marketing programs and deliver customer support. Some trainees will receive MS Office training and ERP software skills.

**Continuous Improvement** – This training will be provided to all occupations to implement Lean manufacturing techniques at the workplace. Trainees will learn process and quality improvement techniques; simplifying and standardizing workflows, establishing continuous flow, minimizing work-in-process, and using visible measures. Training will help employees manage capacity, increase process uptime, reduce set-up times, find "lost" capacity, and eliminate waste by identifying non-value adding activities.

**Request for 2-year Contract term**

Small business proposals are usually limited to a one-year term. However, due to the Company’s production requirements, scheduling may be difficult and trainees can only be trained in small groups. As such, DUI projects that training will extend beyond the standard nine-month training period. Therefore, DUI requests a 2–year contract term to allow time to schedule and deliver all training

**RECOMMENDATION**

Staff recommends approval of this proposal.
PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0309</td>
<td>San Diego</td>
<td>10/29/2014–10/28/2016</td>
<td>$48,620</td>
<td>$25,041</td>
<td>(52%)</td>
</tr>
</tbody>
</table>

ET15-0309 - During the term of the Agreement, DUI received a large, unprecedented and sudden influx of sales from the Korean diving market. This spike in demand caused resources to be pulled away from training.

To ensure performance for this proposal, DUI has developed a new 13-week advanced production planning system, which includes a detailed training schedule. This new system is designed to safeguard the Company from a spike in demand. This proposal was also right-sized to reflect the earnings of the prior Agreement.
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 60 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Accounting/Finance
- Email Communication Skills
- Interpersonal Communication
- Customer Service
- Marketing
- Negotiation Skills
- Planning Events (Trade Shows) Techniques
- Sales Skills
- Manage Time and Priorities
- New Product Knowledge

**MANUFACTURING SKILLS**
- CNC and Sewing Equipment Operations
- Inventory Control and Cycle Counting
- Product Pattern Making
- Preventative Maintenance

**COMPUTER SKILLS**
- Photoshop/Illustrator/InDesign
- Goldmine Contact software
- MS Office
- Social Media (Facebook, Instagram)
- Enterprise Resource Planning (ERP)

**CONTINUOUS IMPROVEMENT**
- 5S
- Leadership
- Lean Manufacturing
- Process Improvement
- Productivity & Quality Improvement
- Statistical Process Control
- Team Development

Safety Training will be limited to 10% of total training hours per-trainee

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
Training Proposal for:

Donaldson Company, Inc.

Agreement Number: ET17-0379

Approval Date: December 28, 2016

ETP Regional Office: North Hollywood  Analyst: M. Niquet

<table>
<thead>
<tr>
<th>Project Profile</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Attributes:</td>
<td>Retraineepriority Rate</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Los Angeles</td>
</tr>
<tr>
<td>Union(s):</td>
<td>No</td>
</tr>
</tbody>
</table>

| Number of Employees in: | CA: 174 | U.S.: 3,665 | Worldwide: 10,921 |
| Turnover Rate: | 17% |
| Managers/Supervisors: | 13% |

**Funding Detail**

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$48,600</td>
<td>$0</td>
<td>$0</td>
<td>$48,600</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $65,209
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineew</td>
<td>Business Skills</td>
<td>90</td>
<td>8-200</td>
<td>$540</td>
<td>$16.48</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Computer Skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cont. Improv.,</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mgmt. Skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mfg. Skills</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $16.48 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 $3.00 per hour may be used to meet the Post-Retention Wage.

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Staff</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Engineering Staff</td>
<td></td>
<td>11</td>
</tr>
<tr>
<td>Managers/Supervisors</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Production Staff</td>
<td></td>
<td>56</td>
</tr>
<tr>
<td>Quality Control Staff</td>
<td></td>
<td>8</td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1915, Donaldson Company, Inc. (Donaldson Company) ([www.donaldson.com](http://www.donaldson.com)) is a vertically integrated filtration company engaged in the manufacture and marketing of products used to improve performance efficiency and air quality. Its products are used by a variety of industry sectors, including commercial/industrial (engines, exhausts, transmissions, vents in private vehicles, hydraulics), aerospace (helicopters, planes), chemical, alternative energy (windmills) and pharmaceuticals.

Donaldson Company is headquartered in Minneapolis, MN with two California locations in Riverside and Valencia. Training will occur at the Valencia facility only. The Company also operates in Belgium, Mexico, China, UK, Thailand, Russia, Japan, Italy, Germany and France.

**PROJECT DETAILS**

Donaldson Company needs to optimize operational capabilities, for the purpose of cost containment, waste reduction, improved delivery times, and customer service. Additionally, the Company’s metrics require increased employee skills and standardization of machining processes.
Training will enable employees to improve their understanding of key performance indicators and develop relevant measurements to improve communication and performance within their teams. Training will help employees achieve corporate customer goals through improved efficiencies in machine utilization with automation (robotic aided).

Donaldson Company is ready to start training upon Panel approval of this agreement. This will be their 1st ETP Agreement.

Training Plan

Business Skills (10%): This training will be delivered to all occupations to provide staff with the skills to effectively manage multiple projects and manage their time, generate and deliver quality presentations and to effectively communicate with both internal and external customers.

Computer Skills (5%): This training will be delivered to all occupations to ensure that employees have the skills to effectively utilize the company’s ERP system and sustain operational effectiveness.

Continuous Improvement (40%): This training will be delivered to all occupations to ensure employees possess the skills to support the Company’s targeted efforts to improve efficiencies and operation.

Management Skills (5%): This training will be delivered to Management to support and execute the Company’s strategic plan and policy deployment.

Manufacturing Skills (40%): This training will be delivered to Management, Production Staff, Engineering Staff and Quality Control Staff to provide them with the technical skills to execute their job requirements including: reading blueprints, CNC programming, production scheduling, preventative maintenance, production scheduling and equipment operation. With a diverse international customer base, staff must possess the skills to meet stringent customer requirements as well as ensure best use of time and resources.

Commitment to Training

Donaldson Company spends an estimated $70,000 annually in training at their California facilities. The Company currently provides on-the-job training related to specific job functions. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

The Company has identified internal lead personnel to oversee training delivery, scheduling, and tracking. The Company has also retained an administrative subcontractor to ensure that training administration and documentation adhere to ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Donaldson Company retained California Manufacturing Technology Consulting (CMTC) in Torrance to assist with development of this proposal. [Note: CMTC is eligible to receive 10% of
Donaldson Company, Inc.

the approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000. In this proposal, the fee will be $4,860. This fee does not affect the approved amount of funding.

**ADMINISTRATIVE SERVICES**

CMTC 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**
- Project Management
- Communication Skills
- Presentation Skills
- Time Management Skills
- New Product Development

**COMPUTER SKILLS**
- MS Office
- Enterprise Resource Planning (ERP)/Oracle

**CONTINUOUS IMPROVEMENT**
- Team Building
- Leadership
- Lean
- International Traffic in Arms Regulations (ITAR)
- National Aerospace and Defense Contractors Accreditation Program (NADCAP)
- Statistical Process Control (SPC)
- RMA-Return Materials Authorization (Quality)
- Non-Conformance Rejection (Quality)
- AS9100
- AS9100 Auditor
- Conducting Quality Audits

**MANAGEMENT SKILLS (Managers and Supervisors Only)**
- Strategic Planning and Policy Deployment

**MANUFACTURING SKILLS**
- Blueprint Training
- Good Manufacturing Practices
- Manufacturing Safety
- CNC Programming
- Equipment Operations
- Production Scheduling
- Preventative Maintenance

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.
DELEGATION ORDER

Retrainee - Job Creation
Training Proposal for:
Edgar S. Macias, M.D., Inc. dba Macias Dermatology

Small Business
ET17-0386

Approval Date: December 20, 2016

ETP Regional Office: Sacramento
Analyst: K. Smiley

CONTRACTOR

- Type of Industry: Services
  Healthcare
- Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees
  California: 19
  Worldwide: 19
  Number to be trained: 22
- Owner: ☒ Yes ☐ No

- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 4%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $26,520
- In-Kind Contribution: $31,000
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Priority Rate SB &lt;100 SET HUA</td>
<td>Business Skills, Computer Skills, Cont. Imp., MS-Didactic</td>
<td>19</td>
<td>8-60 0</td>
<td>$1,170 *$12.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Priority Rate SB &lt;100 SET HUA Job Creation</td>
<td>Business Skills, Computer Skills, Cont. Imp., MS-Didactic</td>
<td>3</td>
<td>8-60 0</td>
<td>$1,430 *$12.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*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 SB Priority
- County(ies): Fresno
- Occupations to be Trained: Medical Assistants, Office Staff, Registered Nurse, LVN, Physician's Assistant, Owner, Cosmetic Specialist
- Union Representation: ☑ Yes ☐ No
- Health Benefits: N/A

SUBCONTRACTORS
- Development Services: Strategic Business Solutions, LLC of Visalia assisted with development services for a flat fee of $1,990.
- Administrative Services: Strategic Business Solutions, LLC will also assist with administration for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2007 and located in Fresno, Edgar S. Macias, M.D., Inc. dba Macias Dermatology (Macias) provides comprehensive dermatology services including skin cancer screenings, UVB Therapy, non-surgical skin cancer therapy and cosmetic services. This will be Macias’ first ETP Agreement.
Project Details

In September 2016, Macias purchased $200,000 in new Laser and Hydra Facial equipment to expand its cosmetic services. Training is required to properly maintain and use this equipment. Training will include equipment set-up, controls and application. Macias plans to purchase an additional $130,000 in Laser and Hydra Facial equipment by March 2017.

In October 2016, Macias also purchased a new Electronic Medical Records (EMR) software system to track treatment plans, appointments, medications and payments for all clients. Training on this new software will ensure workers are proficient in eternal software and can utilize electronic resources.

Retrainee-Job Creation

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

In November 2016, Macias expanded to a new, larger facility to purchase more equipment and offer more cosmetic services. This expansion will require Macias hire and train staff.

Macias has committed to hiring three new staff, Medical Assistant, Office Staff and Cosmetic Specialist (Job Number 2) to ensure an efficient expansion. 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.

SET/HUA

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

All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 15%. The Company’s location in Fresno County qualifies for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. Macias is requesting a wage modification for trainees in Job Numbers 1 & 2, from $15.60 to $12.00.

Training Plan

Training will be provided by via Class/lab and E-learning by in-house experts and vendors to be identified during the contract term.

Business Skills: Training will be provided to all occupations to institute new policies and procedures and increase customer satisfaction. Courses will include Account Development, Medical Practice Administration and Customer Service.

Computer Skills: Training will be provided to all occupations to ensure proficiency in internal software systems. Courses will include EMR, Advanced MD and Point of Sales System Software to ensure trainees are proficient in all systems.
Continuous Improvement: Training will be offered to all occupations. Courses will include Quality Control, Process Improvement, Leadership and Teambuilding.

Medical Skills (Didactic): Training will be provided to Medical Assistants, Registered Nurse, LVN, Physician's Assistant, Owner and Cosmetic Specialist to ensure medical professionals have up-to-date medical knowledge and skills.

RECOMMENDATION

Staff recommends approval of this proposal.
Class/Lab/E-Learning Hours

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Account Development
- Medical Practice Administration
- Customer Service
- Professionalism

**COMPUTER SKILLS**
- Electronic Medical Records Software
- Advanced MD Software
- Point of Sales System

**CONTINUOUS IMPROVEMENT**
- Leadership
- Teambuilding
- Quality Control
- Process Improvement

**MEDICAL SKILLS - DIDACTIC**
- Patient Assessment Skills
- Durable Medical Equipment (Laser/Hydra Facial)
- Medical/Surgical Nursing Skills
- Basic Life Support
- Advanced Cardiac Life Support
- Medication Management and Application
- Dermatology Patient Care

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
Training Proposal for:
Envoy Group, LLC

Small Business
ET17-0340

Approval Date: December 9, 2016

ETP Regional Office: North Hollywood  Analyst: L. Vuong

CONTRACTOR

- Type of Industry: Technology/Other Services
  Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees
  California: 61
  Worldwide: 61
  Number to be trained: 61
  Owner ☒ Yes ☐ No

- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 2%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $49,166
- In-Kind Contribution: $92,540
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineer SB &lt;100 Priority Rate</td>
<td>Business Skills, Computer Skills, Continuous Imp.</td>
<td>61</td>
<td>8-60 0</td>
<td>$806</td>
<td>$20.00</td>
</tr>
</tbody>
</table>

- **Weighted Avg:** 31

### OVERVIEW

Founded in 2008 and located in Irvine, Envoy Group, LLC (Envoy) builds, designs and develops internet/website software. Envoy specializes in designed experiences and business-centric initiatives woven into a single solution called “Branded Platforms.” Branded Platforms allows customers to manage databases, create and plan products, store search patterns and shopper preferences and behaviors, and integrate marketing. In addition, Envoy offers personalization services such as user convenience, security, and 24/7 availability. Major customers include Vizio, Alcatel, Amazing Grass, Weinstein Co., Boost Mobile, Blue Hornet, Chewy, Red Bull, Amazon, Samsung and CBS.

### Need for Training

The information technology industry is advancing at a rapid pace. New systems and products are constantly being introduced in the marketplace. In addition, customers expect better/faster products and services at lower costs. Envoy strives to meet its customers’ expectations and...
demands to keep up with a high technology environment. The Company is focused on building advanced websites/products for customers using complex and sophisticated systems. In addition, the Company is expanding internal software and Android development to attract new customers and keep existing customers. ETP funds will help the Company develop and deliver formalized training to its workforce to upgrade worker job skills, keep up with technological advances, improve overall efficiency and quality services, and enhance customer satisfaction.

In addition, in the past year, Envoy has experienced a 28% growth in sales, its customer base, and its workforce (from 32 to 61 employees). The Company anticipates additional growth, creating a need to increase business capacity. This proposal will target the current 61 workers at its Irvine facility where all training will take place.

Training Plan

Classroom/Laboratory and Videoconference will be delivered on-site by in-house staff in the following:

**Business Skills** - This training will be offered to all occupations. Training will cover goals, policies, cost reduction, revenue and overall business operations.

**Computer Skills** - This training will be offered to all occupations. Training will give staff the skills needed to use the Company’s complex systems, maintain servers, and keep up with the latest software.

**Continuous Improvement** - This training will be offered to all occupations. Training will focus on quality scope, workflow, improved internal relations, efficiency, and procedures to better serve customers.

**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**
- Advertising Development
- Brand Strategy
- Brand ID/Develop
- Business Consulting & Planning
- Creative Concepting
- Content Strategy
- Communication Skills
- Customer Service Skills
- Digital Development
- Finance & Accounting
- Interaction Optimization
- Internet Protocol Development
- Product Launches
- Social Technology: Planning & Research
- Strategic Design
- Strategy and Planning
- Tracking & Analytics: Planning & Research
- User Interface Design

**COMPUTER SKILLS**
- WEB DEVELOPMENT – FRONTEND
  - HTML 5
  - CSS3
  - Javascript (angular.js, backbone.js, jquery)
  - Bootstrap
  - Foundation
  - Bourbon
  - Net
  - SASS/LESS, Grunt/Gulp, Websockets, Video

- BACKEND LANGUAGES
  - PHP (laravel, slim, Symfony2, Zend)
  - Python (Django)
  - Javascript (Express, Socket.io)
  - Java (Spring, Hibernate, J2EE, JSP, GWT)
  - Groovy (Grails)

- DATABASES
  - Relational (MySQL, PostgreSQL, SQLite, Oracle)
  - NoSQL (Cassandra, MongoDB, Redis)
• INFRASTRUCTURE
  o Servers (Apache, Nginx, Tomcat, Jboss, Node.js)
  o Cloud (AWS, Google App Engine, Rackspace)
  o Search (Solr, Elasticsearch, Lucene)
  o Cache (Varnish, HAProxy, Redshift, Memcache, EHCache)
  o Administration (Linux, Windows, Mac)
  o Bid Data (Hadoop, Drill)
  o Message Queue (Beanstalk, Zeromq)

• TOOLS
  o Git & Git Workflow
  o IDE (Android Studio, ADT, XCode, Intellij, Pycharm, PHP Storm)
  o Issue Tracking (Jira)
  o Continuous Integration (Jenkins, Bamboo)
  o Automation (Chef, Puppet, Ansible, Supervisor)
  o QA (Browser Stack, Selenium, Roboelectric, Instruments)
  o ANDROID (4.2 – L)
    o Java
    o Hybrid
    o NDK
    o Core Bluetooth + BLE
    o Storage: SQLite, Shared Preference, File
    o Access, CouchDB
    o Advanced Animations
    o Network Services (Volley, Ion, KSOAP, Native HTTP, UPnP)
    o Location Services (Singleshot, Tracking, Low Battery)
    o Gesture Recognizers
    o Sensor Services
    o Google Cloud Messaging, Amazon SNS
    o In-App Billing, Play Store Licensing
    o Responsive Layouts
    o Google Maps, Widgets
    o Launchers, Chromecast, Google Glass, Andoid Wear

• IOS (6, 7 & 8)
  o Objective-C, Swift
  o Hybrid
  o C/C++
  o Core Bluetooth + BLE
  o Core Data (Relationships, Migration)
  o Dynamic Animators and Behaviors
  o Network Services (AF Networking, Bonjour, NSStream)
  o Core Location (Singleshot, Tracking, Low Battery)
  o Gesture Recognizers
  o Core Motion
  o Local & APNS Notifications, Amazon SNS
  o In-App Billing
- Auotlaying
- Apple Map Kit
- iBeacon, Bonjour, Homekit

- DESIGN
  - InVision
  - Adobe Photoshop
  - Adobe Illustrator
  - Adobe Extract
  - Adobe InDesign
  - Sketch

CONTINUOUS IMPROVEMENT
- Best Practices
- Process Improvement
- Teambuilding

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
Training Proposal for:

Ernie Ball, Inc.

Agreement Number: ET17-0383

Approval Date: December 20, 2016

ETP Regional Office: San Diego

Analyst: M. Ray

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>HUA</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Industry:</td>
<td>Yes</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>San Luis Obispo, Riverside</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Repeat Contractor:</th>
<th>Yes</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Yes</th>
</tr>
</thead>
</table>

|-------------------------|---------|-----------|-----------------|

| Turnover Rate:         | 8%      |

| Managers/Supervisors:  | 15%     |
| (% of total trainees)  |         |

### FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$71,208</td>
<td>$0</td>
<td>$0</td>
<td>$71,208</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required

$91,681
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Imp.</td>
<td>36</td>
<td>8 - 200 0</td>
<td>$828</td>
<td>*$15.60</td>
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<tr>
<td>2</td>
<td>Retraine HUA</td>
<td>Business Skills, Computer Skills, Cont. Imp.</td>
<td>50</td>
<td>8 - 200 0</td>
<td>$828</td>
<td>*$11.70</td>
</tr>
</tbody>
</table>

*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: $15.60 per hour for San Luis Obispo County
- Job Number 2 (HUA): $11.70 per hour for Riverside County

### Health Benefits:
- [x] Yes  [ ] No  This is employer share of cost for healthcare premiums – medical, dental, vision.

### Used to meet the Post-Retention Wage?
- [x] Yes  [ ] No  [ ] Maybe

Up to $2.79 per hour for Job Number 1 and $0.70 per hour for Job Number 2 may be used to meet the Post-Retention Wage.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
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</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
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<td></td>
</tr>
<tr>
<td>Administration</td>
<td>4</td>
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<tr>
<td>Information Technology</td>
<td>1</td>
<td></td>
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<tr>
<td>Sales</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Production</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>7</td>
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<tr>
<td>Information Technology</td>
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<tr>
<td>Sales</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Production</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>Manager I</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Manager II</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1962 and headquartered in Coachella, Ernie Ball, Inc. (Ernie Ball) (www.ernieball.com) manufactures custom-gauge guitar strings and accessories. Its San Luis Obispo facility manufactures guitars and bases, volume pedals, and other accessories through its company brand, Music Man. The Company’s products are sold to more than 6,000 music stores throughout the U.S. and internationally.

Ernie Ball will be the primary contract holder for its Coachella (40 trainees) and San Luis Obispo (36 trainees) facilities. In addition, the training plan includes approximately 10 workers from its closely-related affiliate, Paladar Mfg, Inc. (Paladar). Located in the same facility in Coachella, Paladar manufactures strings exclusively for Ernie Ball.

Ernie Ball and Paladar qualify for standard ETP funding as manufacturing companies facing out-of-state competition as specified under Title 22, California Code of Regulations (CCR), Section 4416(i)(1).

PROJECT DETAILS

Training in this proposal is heavily driven by the following company-wide initiatives:

1. New software systems – Ernie Ball has used its current in-house ERP System, ADDON, for the last 30 years. To support its technological advancement, the Company invested $250,000 on new printers, scanners and software systems such as Computer-Aided Design (CAD) and a new ERP system, Open Pro. Open Pro is scheduled to go-live on February 2017; and

2. Organization restructuring – To fully support the technological changes within the Company, Ernie Ball must also modernize and streamline its business processes. For example, the Company will revamp its Sales Department to include remote sales workers. Further, the Company added a new Marketing/Creative Department which consists of team of experts who will fully support both domestic and international marketing and creative design efforts.

With the help of ETP funding, Ernie Ball will be able to provide an extensive training program to its workforce to support the initiatives mentioned above. The new ERP system will affect the entire organization specifically in sales, billing, accounting, production planning, shipping/warehousing and inventory. As such, a significant amount of training will be provided to all staff to support the success of the implementation and throughout the expected upgrades of the software system.

Funding will also allow the Company to provide training targeted to specific roles and responsibilities of each job occupation to improve existing and develop new business processes. Overall, training will provide the technological edge and streamline business processes to continue to be viable in the industry.

Training Plan

Training in this proposal will be delivered via class/lab by in-house trainers and vendors acquired during the term of the proposed agreement. Training will be in the following skills:

**Business Skills (5%)**: Training will be offered to all occupations. Course topics will include sales, communication, customer service, time management, conflict management, goal setting and presentation skills. Training will provide worker with skills to effectively interact with internal and
external customers; better assess and meet customer expectations; manage work goals and priorities; and improve sales and presentation skills.

**Computer Skills** (70%): Training will be offered to all occupations. A significant amount of ERP software application skills training will be provided to effectively utilize the system and improve operational efficiencies. Training will also allow select Production and Management Staff to effectively utilize the Company’s CAD system to acquire technical knowledge necessary to fulfill their job duties and meet customer requirements. Overall, training will allow the Company to successfully enforce its commitment to technological advancement.

**Continuous Improvement** (25%): Training will be offered to all occupations. Training in Team Building, Leadership, Lean Manufacturing, and Production & Inventory Management will provide workers with skills to incorporate new or improved business processes as a result of revamping the Sales Department and implement the Marketing/Creative Department.

**HUA Wage Modification**

Trainees in Job Number 2 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. The Company’s location in Coachella qualifies for HUA status under these standards. Ernie Ball is requesting a wage modification from $15.60 to $11.70 for eight trainees in lower-wage occupations.

**Commitment to Training**

ETP funds will not displace the existing financial commitment to training. Its current annual training budget per facility is $12,000 for all training.

➢ **Training Infrastructure**

Ernie Ball has contracted with California Manufacturing Technology Consulting (CMTC) to assist with ETP project administration. In addition, the Company has designated a number of staff to schedule and oversee the training as well as collect and submit training rosters to the administrative subcontractor for data entry into the ETP systems.

**Impact/Outcome**

Ernie Ball’s training plan will continue to focus on developing employee talent, upgrading employee skills, and ensuring the all employees possess the knowledge to sustain its new and evolving software systems. The Company will continue to identify opportunities to build employee technical and job-specific skills through its ongoing training efforts.

Overall, ETP funding will allow the Company to supplement and expand its training efforts to provide assurance that employees are prepared to take on job duties as it undergoes complex technology transition as well as company-wide business process improvement.

**RECOMMENDATION**

Staff recommends approval of this proposal.
DEVELOPMENT SERVICES

CMTC in Torrance assisted with development of this proposal at no cost. CMTC is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP.

ADMINISTRATIVE SERVICES

CMTC 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**
- Sales Skills
- Customer Service
- Communication Skills
- Goal Setting
- Time Management
- Conflict Management
- Presentation Skills

**COMPUTER SKILLS**
- Enterprise Resource Planning
- Word Processing
- Spreadsheets
- CAD/CAM Software Training

**CONTINUOUS IMPROVEMENT**
- Team Building
- Leadership Skills
- Lean Manufacturing
- Production & Inventory Management

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

Training Proposal for:
Evista Industries, Inc.

Small Business
ET17-0360

Approval Date: December 19, 2016

ETP Regional Office: San Diego       Analyst: J. Davey

CONTRACTOR

• Type of Industry: Construction
  Services
Priority Industry: ☒ Yes ☐ No

• Number of Full-Time Employees
  California: 25
  Worldwide: 25
Number to be trained: 25
Owner ☒ Yes ☐ No

• Out-of-State Competition: No OSC
• Special Employment Training (SET): ☒ Yes ☐ No
• High Unemployment Area (HUA): ☐ Yes ☒ No
• Turnover Rate: 9%
• Repeat Contractor: ☐ Yes ☒ No

FUNDING

• Requested Amount: $22,750
• In-Kind Contribution: $32,550
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SET SB &lt;100 Priority Rate</td>
<td>Business Skills, Comm’l. Skills, Computer Skills, Cont. Imp.</td>
<td>25</td>
<td>8-60</td>
<td>0</td>
<td>$910</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: $26 SB Priority
- County(ies): Los Angeles, Orange, San Diego
- Occupations to be Trained: Account Lead, Administrative Staff, Consultant, Project Lead, Owner
- Union Representation: Yes
- Health Benefits: N/A

**SUBCONTRACTORS**

- Development Services: Training Funding Source of Seal Beach assisted with development for a flat fee of $1,900.
- Administrative Services: Training Funding Source will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

**OVERVIEW**

Established in 2005 and headquartered in Newport Beach, Evista Industries, Inc. (Evista) began as an indoor environmental consulting company focused on the commercial property management industry. In 2010, Evista rebranded and refocused its services to the insurance and restoration industry. Customers include AAA, Allstate Insurance, Farmers Insurance and restoration companies such as ServPro. The Company maintains two other offices in Los Angeles and San Diego.

The environmental consulting industry demands a high degree of expertise and exceptional customer relations to deliver its services. Training in EPA technical requirements and other health and safety standards are essential to its services. These requirements are updated regularly and employees must learn the most recent compliance standards and permitting requirements to serve its clients.
In addition, Evista recently reorganized its operating model to service a broader market. As a result, the Company established new roles for most of its employees that require cross-functional training in a range of skills, from technical work in the field to client relationship management as well as software and general administrative skills. The Company must also improve overall employee job skills to better compete in a saturated marketplace. Training employees to work smarter and streamline operations will enable the Company to grow and expand its opportunities.

Training Plan

Training will take place at the Company’s three facilities in Los Angeles, Newport Beach and San Diego. Training will be provided by a combination of in-house experts and outside training vendors in the following:

**Business Skills:** Training will be offered to all occupations in skills to find, coordinate, and connect with key buying influencers across an organization and foster those relationships for the greatest success. Workers will also learn how to craft strategies that neutralize competition and increase business with existing accounts. Skills include Account Management, Business Development/Sales, Client Relationships and Leadership.

**Commercial Skills:** Training will be offered to all occupations in how to minimize the impact of operating permits, reduce duplicative or unnecessary monitoring and standardize permits across agencies. Trainees must learn the latest guidance and regulations from EPA and other government agencies. Skills include Air Quality and Permitting, Asbestos and Lead-Based Paint and Environmental Cost & Quality/Risk Assessment.

**Computer Skills:** Training will be offered to all occupations in Salesforce software and customized applications (page layouts, fields, tabs and business processes). Workers will learn to create a secure Salesforce environment, maintain and import clean data, and set-up workflow automation. MS Office training will help identify new and enhanced features, modify documents, enhance worksheet data (Excel), augment a presentation (PowerPoint), create a database (Access), and navigate Outlook. Other skills include Digital Marketing, WordPress and Shoretell.

**Continuous Improvement:** Training will be offered to all occupations in core process improvements to design and execute process change. Workers will be able to apply a Business Process Improvement Framework and create Key Performance Indicators to measure improvement. Trainees will learn to analyze and improve processes using the “To-Be” Solution companywide. Skills include Process Improvement, Quality Improvement, Planning and Goal Setting.

**Special Employment Training Wage Modification**

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must 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 wage up to 25% below the statewide average hourly wage (from $28.37 to $21.28). Evista requests this modification.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8-60

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Account Management
- Business Development/Sales
- Client Relationships
- Financial Management
- Leadership
- Monthly Reporting
- Product/Service Knowledge
- Sales and Marketing
- Time Management

**COMMERCIAL SKILLS**
- Air Quality and Permitting
- Asbestos and Lead Based Paint
- Demolition
- Environmental Cost & Quality/Risk Assessment
- Industrial Hygiene Techniques
- Mold
- Sewage Contamination
- Soot/Char Residue
- Surface/MVAC
- Waste Characterization

**COMPUTER SKILLS**
- Database Software-Salesforce
- Document Conversion
- Digital Marketing – Development and Management
- Microsoft Office
- Monitoring and Management of ShoreTel, Mitel and Ericsson Voice Solutions
- WordPress, Website

**CONTINUOUS IMPROVEMENT**
- Goal Setting
- Planning
- Process Improvement
- Quality Improvement

**Note:** Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
DELEGATION ORDER

Retrainee - Job Creation
Training Proposal for:
Fasone Construction, Inc.

Small Business
ET17-0377

Approval Date: January 24, 2017

ETP Regional Office: North Hollywood   Analyst: J. Romero

CONTRACTOR

- Type of Industry: Construction

- Number of Full-Time Employees
  - California: 17
  - Worldwide: 17
  - Number to be trained: 26

- Out-of-State Competition: No OSC
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 3%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: $27,040
- In-Kind Contribution: $14,820
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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<tbody>
<tr>
<td>1</td>
<td>SB&lt;100</td>
<td>Business Skills; Computer Skills; Continuous Impr</td>
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<td>2</td>
<td>SB&lt;100</td>
<td>Business Skills; Computer Skills; Continuous Impr</td>
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<td>8-60</td>
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<td>$20.00</td>
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<td>Job Creation Initiative SET Priority Rate</td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 40</td>
<td></td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #’s 1 and 2: $26 SB Priority
- County(ies): Los Angeles County
- Occupations to be Trained:
  - Sales/Marketing Staff, Architect, Carpenter, Foreman, Electrician, Project Staff, Project Manager, Manager/Supervisor, Estimator, Business Development Staff, Superintendent, Owner
- Union Representation: 
  - ☐ Yes
  - ☒ No
- Health Benefits: Job #1 only: $3.00 per hour

### SUBCONTRACTORS

- Development Services: Neuro Engineering in Beverly Hills assisted with the development of this proposal at no cost.
- Administrative Services: N/A
- Training Vendors: To Be Determined

### OVERVIEW

Fasone Construction, Inc. (FasoneGBC.com), Fasone is a full service design and construction company specializing in project design and construction, remodeling, renovations and tenant improvement projects. Since its inception in 1995, the Company has completed over $30M worth of work for private, governmental, and commercial customers in the Southern California area. Projects include the Ronald Reagan Library, City of Los Angeles Fire Station, John Wayne Airport, J&J Snack Food Corp., BumbleBee Foods LLC, Nexalin Center, City of Riverside Protection Services and Metro State Hospital.
**Need for Training**

Fasone has been experiencing increased demand for services due to its success in providing design, project estimate, construction supervision, framing, drywall, electrical, plumbing, structural and architectural concrete, and architectural millwork services. The Company is expanding its market opportunities throughout California. Thus, employees must be trained on the latest methods, updates and requirements in the construction industry. Training will be provided through structured and formal methods to improve employee performance, customer service, and sales, and to establish a training culture that will benefit all employees.

**Retrainee - Job Creation**

Fasone is expanding existing business capacity and hiring employees. The Company anticipates further business expansion over the next years. The Company has committed to hiring 9 new employees (Job Number 2).

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

Fasone is ready to start training upon approval of this project. The Company has a training plan in place and will provide about 4 hours of training per employee per month. Training will be provided at the Company’s facility in Santa Fe Springs by a combination of in-house staff and vendors. In addition, Fasone will have an administrative coordinator to track all class training and rosters.

**Business Skills** - This training will be offered to all occupations. The training will focus on skills to enhance company communication, time management and job performance. Employees will develop skills to facilitate more efficient workflow and processes that will improve company performance.

**Computer Skills** - This training will be offered to all occupations. Trainees will receive training in digital marketing, computer networking, Customer Relationship Management software and Quickbooks to enhance production planning and project management skills.

**Continuous Improvement** - This training will be offered to all occupations to support improving processes, reducing operating costs, and increasing efficiency. Training will focus on teambuilding, process improvement, planning and design, decision making and Light Construction Methodologies.

**Commitment to Training**

Fasone has an annual budget of $10,000 for training which includes mandatory training, employee orientation, OSHA-mandated training, sexual harassment prevention and first aid training. ETP funds will not displace the Company’s existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.
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.

➢ Wage Modification

The Panel may modify the minimum wage requirement for companies in priority industries, such as construction, up to 25% below the state average hourly wage (from $28.37 per hour to $21.28 per hour). Fasone is requesting this modification.

RECOMMENDATION

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 60

Trainees may receive any of the following:

BUSINESS SKILLS
- Marketing
- Business Performance
  - Business Planning
  - Business Administration
  - Financial Strategies
- Project Management: Strategic Planning
- Negotiating
- Interpersonal Skills
- Customer Service
  - Customer Relations
  - Identifying Customer Needs
  - Handling Customer Requests
- Sales and Customer needs
- Motivation
- Coaching
- Retaining Customers
- Interpersonal Communication
- Relationship Building

CONTINUOUS IMPROVEMENT
- Teambuilding
- Leadership Skills
- Decision Making
- Key Activity Practices
- Process Improvement
- Light Construction Methodologies (LEAN)
- Engineering Theory/Planning/Design

COMPUTER SKILLS
- Digital Marketing
- Customer Relation Management (CRM) Software
- Computer Networking
- QuickBooks
- Financial Management System

Safety Training will be limited to 10% of total training hours per-trainee.

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
DELEOGATION ORDER

Retrainee - Job Creation
Training Proposal for:
HigherGround, Inc.

Small Business
ET17-0422

Approval Date: February 7, 2017
ETP Regional Office: North Hollywood Analyst: J. Romero

CONTRACTOR

- Type of Industry: Services
  Technology/IT
- Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees
  California: 23
  Worldwide: 30
  Number to be trained: 28
  Owner: ☒ Yes ☐ No

- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 19%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $40,040
- In-Kind Contribution: $88,000
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainees SB &lt;100 Priority Rate / Continuous Improvement, Management Skills, PL-Computer Skills</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Management Skills, PL-Computer Skills</td>
<td>23</td>
<td>8-60 0-20</td>
<td>$1,430</td>
<td>$22.50</td>
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<td>2</td>
<td>Retrainees SB &lt;100 Priority Rate / Job Creation Initiative</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Management Skills, PL-Computer Skills</td>
<td>5</td>
<td>8-60 0-20</td>
<td>$1,430</td>
<td>$19.23</td>
</tr>
</tbody>
</table>

### Notes:
- Reimbursement Rate: Job #’s 1 & 2: $26 SB Priority
- County(ies): Los Angeles County
- Occupations to be Trained: Administration Staff, Productions Staff, Sales & Marketing Staff, Technical Staff, Research & Development Staff, Manager, Supervisor, Controller, Senior Accountant, Client Support Technician, Owner
- Union Representation: Yes
- Health Benefits: N/A

## SUBCONTRACTORS

- Development Services: California Training Coalition in Upland (CTC) assisted in the development of this proposal at no charge.
- Administrative Services: CTC will also provide administration services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

## OVERVIEW

HigherGround, Inc. (HGI) ([www.higherground.com](http://www.higherground.com)) a small business located in Canoga Park, specializes in the development of call-recording software, data integration and reporting tools used by both public and private organizations in and outside of California. Founded in 1973, HGI has provided numerous companies with the ability to monitor, record and verify phone and

Over the years, the commercial market has been moving toward cloud based solutions. While current HGI products have web-based interface capability, HGI needs to direct their product roadmap toward cloud-based products to remain competitive in the market. This new direction in product innovation will require a higher level of training on new programming languages, coding styles, testing methodologies, and maintenance and support solutions. The speed of changing technology also requires the Company to continuously train its employees to adapt to the evolution of technology. HGI is requesting ETP funds to train their employees with technology upgrades, gain more advanced skills sets, enhance their knowledge and understanding in supporting and maintaining these products, and software systems.

Training Plan

The company recently completed its third ETP project (ET15-0113). That project facilitated training in the use of advanced and intermediate software modules, specifically NextGen Capture 911 and NextGen Quality 911. In this new proposal, HGI will provide a higher level of training using software modules in a cloud-base environment. In addition, HGI has implemented a new ERP system to support the cloud-based environment for new products in development, requiring all HGI employees to receive training in the utilization and maintenance of the system.

HGI is ready to start training upon project approval. They have qualified trainers to provide training and a training plan in place. In addition, HGI will work closely with administrator, CTC, who track all class rosters.

Business Skills: (25%) This training will be offered to all occupations. Strategic planning and business development training will focus on employee skills that will support response to rapid market change, and equip to adapt and respond to technology upgrades. Training will facilitate better decision making, improve internal operations, and customer relations.

Management Skills: (15%) This training will be offered to Managers and Supervisors. Management skills, leadership training and employee development will be provided to Managers, Supervisors, and team leads to improve their leadership and coaching skills. This will enable them to become more effective in leading teams. HGI’s management team is influential in implementing improved performance. Training will provide managers with effective methods that will keep employees challenged, motivated, and fully engaged.

Computer Skills: (38%) This training will be offered to all occupations. HGI’s software products are complex and utilize sophisticated algorithms. Technical and Production Staff will train on new programming languages such as object oriented programming, new coding styles, effective testing methodologies, and technical training to install, implement, maintain, upgrade and support the software with the wide variety of customer platforms. Marketing staff will also receive training in computer graphic design, web platforms, and marketing automation tools. All occupations will receive training on new ERP system.

Continuous Improvement: (20%) This training will be offered to all occupations. HGI employees will receive training in Key Performance Indicators (KPI), Statistics and Process Control, Root-Cause Failure Analysis, Project Management, and Process Value Mapping to upgrade their knowledge and skills in process improvement and have better control of anticipated outcomes.
CBT – Computer Skills (2%): This training will be offered to all occupations based on job function. Training will cover industry-specific topics related to a trainee’s specific line of work and job duties, and reimbursed at a lower rate.

Productive Laboratory

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

Fifteen trainees will receive PL – Computer Skills. The training will be provided to Research & Development Staff, Technical Staff and Production Staff. These staff support, customize and integrate the Service Manager Report, Virtual Servers, and Performance Management System (Performance Pro) equipment.

Trainees will receive no more than 24 hours of PL. Training will cover different types of call center metrics and analytics using live interaction with customers. PL training will use actual customer calls taken by a trainee.

The trainer will direct the trainee with step-by-step processes for troubleshooting, ensuring trainee executes various steps needed to correct a system or perform an upgrade, while ensuring the customer receives the highest level of support. The trainer-to-trainee ratio will not exceed 1:1.

Retrainee - Job Creation

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

HGI has committed to hiring 5 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.

HGI plans to hire approximately 5 “net new jobs” under this Agreement in response to increased demand for products and services, which has grown steadily since 2013 with continued growth forecasted over the next several years. The Company’s new direction on product innovation involving cloud-based environment demands filling new positions in the Sales and Marketing, Administration and Accounting, and the Technical and Production departments.

Commitment to Training

HGI reserves an annual budget of $20,000 for training which includes mandatory training, employee orientation, basic safety training, sexual harassment prevention and first aid training. ETP funds will not displace the Company’s existing financial commitment to training. Safety training is, and will continue to be provided in accordance with all pertinent requirements under state and federal law.

➢ Training Infrastructure

HGI is ready to start training upon approval. Training will be provided at the HGI facility in Canoga Park by a combination of in-house staff and vendors.
**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes performance by HigherGround, Inc. under an ETP Agreement that was completed within the last five years:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
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<tbody>
<tr>
<td>ET15-0113</td>
<td>Canoga Park</td>
<td>07/01/14 – 06/30/16</td>
<td>$70,720</td>
<td>$67,949 (96%)</td>
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<tr>
<td>ET11-0237</td>
<td>Canoga Park</td>
<td>04/18/11–04/17/13</td>
<td>$49,400</td>
<td>$49,400 (100%)</td>
<td></td>
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</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 60

Trainees may receive any of the following:

COMPUTER SKILLS
- Programming Languages
- Graphic Design software programs (Adobe Acrobat, TBD)
- Marketing Automation & Web platforms
- Calibre Product Training, Installation, Maintenance & Support
- Integrations (911 Systems, Consoles, Radio, CAD, Avaya, Cisco, Shortel, Microsoft Lync, CRM, Video API, etc.)
- Advanced Microsoft (Excel, Word, Outlook, PowerPoint, Visio)
- ERP (NetSuite Accounting, NetSuite CRM, NetSuite Project Management, NetSuite Case Management)
- Learning Management System

BUSINESS SKILLS
- Strategic Planning & Business Development
- Competitive Analysis
- Business Analytics
- Customer Service Skills
- Presentation Skills
- Sales Training and Negotiation Skills
- Cost Analysis & Finance
- Essentials of Human Resources (strategy, compensation, performance management & retention)
- Business Writing
- Marketing Analysis and Positioning

CONTINUOUS IMPROVEMENT SKILLS
- KPI Indicators
- Process Control, Root-Cause Failure Analysis, Process Value Mapping
- Project Management

MANAGEMENT SKILLS (management trainees only)
- Strategy & Planning
- Business Development
- Leadership
- Employee Development and Team Building

PRODUCTIVE LAB (PL)
0 - 24

PL - COMPUTER SKILLS (Limited ratio: 1:1)
- Calibre Product Productive Lab Training (PLT)
- Calibre Maintenance & Support Productive Lab Training (PLT)
- VoIP Productive Lab Training (PLT)
- Integrations Productive Lab Training (PLT)
- Trunked Radio Productive Lab Training (PLT)

**CBT Hours**

0 – 20

**COMPUTER SKILLS**

- Advanced Microsoft Word (16 hours)
- Advanced Microsoft Excel (16 hours)
- Advanced Microsoft Outlook (16 hours)

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours. PL is capped at 24 hours per-trainee.
Training Proposal for:
Hutchinson and Bloodgood LLP
Small Business
ET17-0352

Approval Date: December 14, 2016
ETP Regional Office: North Hollywood Analyst: E. Wadzinski

CONTRACTOR

- Type of Industry: Services
  Priority Industry: □ Yes ☒ No
- Number of Full-Time Employees
  California: 86
  Worldwide: 86
  Number to be trained: 78
  Owner □ Yes ☒ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): □ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☒ No
- Turnover Rate: 2%
- Repeat Contractor: □ Yes ☒ No

FUNDING

- Requested Amount: $62,678
- In-Kind Contribution: $275,376
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<td>8-200 0</td>
<td>$814</td>
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- Weighted Avg: 37

- Reimbursement Rate: $22 SB Non-Priority
- County(ies): Los Angeles, San Diego, Imperial, Santa Cruz
- Occupations to be Trained: Senior Accountant, Manager, Accounting Staff, Director, Administration, Support
- Union Representation: Yes
- Health Benefits: N/A

### SUBCONTRACTORS

- Development Services: Training Refund Group (TRG) in Irvine assisted with development for a flat fee of $3,000.
- Administrative Services: TRG will also assist with administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

### OVERVIEW

Founded in 1922, Hutchinson and Bloodgood LLP (HBLLP) ([www.hbllp.com](http://www.hbllp.com)) provides tax planning, auditing, information technology consulting, business valuations, and business advisory services. HBLLP is a regional firm with four California offices: Glendale, El Centro, San Diego and Watsonville. The Company provides clients with informed choices and personal service from a team of accountants and consultants with diverse backgrounds and experience. The Company is focused on building lasting relationships by delivering high-quality services to clients in a variety of industries including agriculture, construction, healthcare, life sciences, manufacturing and distribution, and technology businesses. Customers include family businesses, franchises, not-for-profit firms, and special districts.

### Need for Training

To provide customers with quality service and remain competitive, employees must be knowledgeable of the latest accounting rules, tax issues and business plans. Trainees must be knowledgeable of rules and standards established by organizations, including GAAP (Generally Accepted Accounting Principles), FASB (Financial Accounting Standards Board), the SEC
(Securities Exchange Commission), and GASB (Governmental Accounting Standard Board). Each of these organizations regularly publish changes to the accounting and audit rules. Training in these rules and standards along with topics in Business Skills will enable the Company to improve customer service.

Training Plan

In-house trainers will deliver most of the training, but the Company may retain vendors if necessary. The Company has assembled a team to handle administration. The Company also retained Training Refund Group to assist with administration.

Business Skills (5%) – Training will be offered to all occupations. Training will provide workers knowledge and skills to provide quality customer service, improve customer relationships, and deliver informed presentations and recommendations.

Commercial Skills (10%) - Training will be offered to Senior Accountants, Managers, Accounting Staff, Directors and Support. Specialized training topics in Auditing & Tax Updates and Governmental Compliance will enable workers to stay current and keep clients in compliance with regulatory changes. Accounting staff will learn new interpretations of existing laws to provide the best benefit to customers.

Computer Skills (85%) - Training will be offered to all occupations. Training will include QuickBooks, Intermediate Microsoft Office and new versions of internal software. This training will improve productivity by enabling employees to effectively create databases, spreadsheets, reports, charts, graphs and professional presentation materials.

Modification to Small Business Term Limit

The Company is requesting a modification to the Small Business term limit, increasing the 12-month term to 24 months. Services in the financial advisory industry are cyclical in nature. Thus, training will be difficult to provide during the busy time period (from mid-January through May 1 and again from late August through the end of October). A two-year term will allow the Company more time to provide training.

Modification to Small Business Maximum Hours

HBLLP is also requesting a modification to increase the maximum training hours allowed for a small business from 60 to 200. This increase will allow a core group of Accountants to receive additional training to handle customers with specialized requirements.

HUA

Job Number 1 includes 27 trainees that work in El Centro (Imperial County) and Watsonville (Santa Cruz County), High Unemployment Areas (HUA) with unemployment exceeding the state average by at least 25%. However, the Company is not asking for a wage modification.

RECOMMENDATION

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200  Trainees may receive any of the following:

**BUSINESS SKILLS**

- Communications
- Team Building
- Client Management
- Leadership Skills
- Marketing and Networking Skills
- Presentation Skills

**COMPUTER SKILLS**

- Tax Software
- Tax Research
- Quickbooks
- Intermediate MS Office

**COMMERCIAL SKILLS**

- Audit and Accounting
- Fraud
- Taxation
- Estate, Financial, and Tax Planning

Note: Reimbursement for retraining is capped at 200 total hours per-trainee, regardless of method of delivery.
Training Proposal for:
Ironworker Employees' Benefit Corporation

Small Business
ET17-0392

Approval Date: December 27, 2016

ETP Regional Office: North Hollywood
Analyst: M. Webb

CONTRACTOR

- Type of Industry: Financial Services
- Number of Full-Time Employees
  - California: 87
  - Worldwide: 87
  - Number to be trained: 39
- Priority Industry: No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): Yes
- High Unemployment Area (HUA): No
- Turnover Rate: 17%
- Repeat Contractor: No

FUNDING

- Requested Amount: $16,302
- In-Kind Contribution: $29,023
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100 SET</td>
<td>Business Skills, Computer Skills, Cont. Imp.</td>
<td>39</td>
<td>8-60</td>
<td>0-2</td>
<td>$418</td>
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<tr>
<td></td>
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<td></td>
<td>Weighted Avg: 19</td>
<td></td>
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</tr>
</tbody>
</table>

- Reimbursement Rate: $22 SB Non-Priority
- County(ies): Los Angeles
- Occupations to be Trained: Claims Representative, Employer Accounts Staff, Benefits Representative, Customer Service Staff, Information Technology Staff, Administration Staff, Managers, Accounting Staff
- Union Representation: □ Yes, □ No
- Health Benefits: $1.99 per hour

SUBCONTRACTORS
- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: N/A

OVERVIEW

Founded in 1976, Ironworker Employees’ Benefit Corporation (IBEC) (www.Ironworkerbenny.com) is a non-profit portfolio management company that provides administrative services for the International Association of Bridge, Structural and Ornamental Iron Workers, and the California Ironworker Employers Council, Inc. Services include contribution collection, processing and handling; and payment of health and welfare pension, vacation, and all other benefits. IBEC oversees and verifies that all benefit plans are in accordance with Trust Fund requirements pursuant to the Collective Bargaining Agreements, as appropriate. This will be the Company’s first ETP Agreement.

IBEC’s new Executive Director has developed a training plan to increase efficiency, motivate staff, and maintain quality customer service. In addition, the Company must ensure compliance with government regulations as mandated by the Department of Labor, the Internal Revenue Service, and the Employee Retirement Income Security Act. To remain in compliance, IBEC will provide training to increase employee knowledge and improve overall office effectiveness.
**Training Plan**

IBEC is currently in the first phase to replace a computer system that has been in place for the last 25 years. The new system will incorporate multiple applications to increase employee proficiency. Training will focus primarily on restructuring the Employers Accounting System. Staff will learn new processes and steps that have been implemented to ensure a more user-friendly system.

Staff will also receive training on a new scanning system (XMedius) that requires member and employer files to be scanned directly into the Laser fiche system. This will eliminate the need for paper files being created and maintained going forward.

Curriculum topics provided will enhance staff's ability to help the customer, set and meet goals, and improve leadership and team building skills.

**Business Skills:** Training will be offered to all occupations to increase customer service and time management skills. Topics include Customer Service/Support, Communication and Conflict Resolution.

**Computer Skills:** Training will be offered to all occupations to utilize IBEC’s new computer system. Training topics will also include Microsoft Office (Excel), SharePoint and XMedius.

**Continuous Improvement:** Training will be offered to all occupations to increase staff skill sets, increase proficiency, and improve workflow in the office. Curriculum topics include Performance Management, Strategic Planning and Leadership/Motivation.

**Computer-Based Training**

Computer-Based Training (CBT) will be provided to staff. Job Specific training topics that meet ETP requirements have been identified and are included in the Menu Curriculum. CBT will not exceed 50% of the trainee’s total number of training hours.

**SET**

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

**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 Service/Support
- Communication/Conflict Resolution

**COMPUTER SKILLS**
- Microsoft Office (Word, Excel, PowerPoint)
- SharePoint
- XMedius
- Trust Software

**CONTINUOUS IMPROVEMENT**
- Leadership/Motivation
- Team Building/Managing a Team
- Performance Management
- Goal Setting
- Change Management
- Strategic Planning
- Process and System Improvement

CBT Hours
0-2

**BUSINESS SKILLS**
- Health Insurance Portability and Accountability Act

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

Retrainee - Job Creation
Training Proposal for:
K. Line Fire Equipment Co., Inc.

Small Business
ET17-0420

Approval Date: January 25, 2017

ETP Regional Office: North Hollywood   Analyst: M. Reeves

CONTRACTOR

- Type of Industry: Services
  Wholesale Trade

- Number of Full-Time Employees
  *California: 3
  Worldwide: 3
  **Number to be trained: 2
  Owner  Yes  No

*Three full-time employees are on payroll as of 2015 Q2, including the owner, according to EDD records.
**The two trainees will be newly hired and are not included in this count.

- Out-of-State Competition: No OSC
- Special Employment Training (SET): Yes  No
- High Unemployment Area (HUA): Yes  No
- Turnover Rate: 0%
- Repeat Contractor: Yes  No

FUNDING

- Requested Amount: $2,200
- In-Kind Contribution: $2,000
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine Job Creation Initiative</td>
<td>Business Skills, Commercial Skills, PL-Comm Skills</td>
<td>2</td>
<td>8-60</td>
<td>0</td>
<td>$1,100</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*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:** $22 SB Non-Priority
- **County(ies):** Los Angeles
- **Occupations to be Trained:** Office Administrator, Service Technician
- **Union Representation:** ☐ Yes, ☒ No
- **Health Benefits:** $3.00 per hour

SUBCONTRACTORS

- **Development Services:** N/A
- **Administrative Services:** N/A
- **Training Vendors:** N/A

OVERVIEW

Founded in 1995, K. Line Fire Equipment Co., Inc. (K-Line) is a full service fire protection contractor that provides installation, maintenance, repair, and Regulation 4 certified testing. The Company services all systems including fire extinguishers, fire sprinklers, fire alarms, fire doors, and fire hoses.

Need for Training

K-Line is making a push for growth by adding new customers through larger commercial and industrial fire protection projects. With many business operations having been provided by the owner to date, the Company now needs to hire more employees to support growth. Training will focus on office management, sales, and field service skills.

Retraine Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.
The Company has committed to hiring two new employees (one office administrator and one service technician) to facilitate the early stages of expansion.

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

**Training Plan**

Training will take place at the Company’s facility in Harbor City and will be in-house.

**Business Skills** - The Office Administrator will learn fundamental office and project management skills. Training will also include a comprehensive study of the various stages of the sales cycle. These modules are designed to equip staff with communication, product knowledge and customer service skills to perform business-related tasks with confidence and efficiency.

**Commercial Skills** – The Service Technician will learn trade-specific skills needed to work safely and effectively in the fire protection industry. Training will include class/lab theory and applied hands-on instruction.

**Productive Laboratory**

Productive Lab trainees may produce goods for profit in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

Company representatives indicate that PL training in Commercial Skills is the most effective way for Service Technicians to hone the skills needed to install, maintain, test, and repair fire protection systems and equipment. PL will allow these workers to achieve the competencies needed to perform their jobs with the highest level of safety and efficiency.

The proposed PL training will involve the use of various fire protection tools and equipment such as fire extinguishers, sprinkler systems, extinguishing agents, control valves, hoses, nozzles, control units, and pressure devices. Training will be provided in-house by industry professionals, primarily the owner. The trainer-to-trainee ratio will be 1:1 and training will be capped at 24 hours per trainee.

**Special Employment Training (SET)**

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. For Job Creation, trainees qualify at the Standard New Hire Wage.

**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
- Office Management Skills
  - Administration Management
  - Project Management
  - Filing
  - Customer Service
- Sales Skills
  - Planning
  - Prospecting
  - Presentations
  - Proposals
  - Closing
  - Follow-up

COMMERCIAL SKILLS
- Fire Extinguisher Maintenance
- Fire Alarm Testing
- Fire Door Testing
- Fire Sprinkler Testing
- Wet/Dry Standpipe Testing
- Fire Escape Testing
- Fire Sprinkler Maintenance
- Wet/Dry Standpipe Maintenance

PL Hours
0 - 24

COMMERCIAL SKILLS (1:1 trainer-to-trainee ratio)
- Fire Extinguisher Maintenance
- Fire Alarm Testing
- Fire Door Testing
- Fire Sprinkler Testing
- Wet/Dry Standpipe Testing
- Fire Escape Testing
- Fire Sprinkler Maintenance
- Wet/Dry Standpipe Maintenance

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. PL is capped at 24 hours per-trainee.
DELEGATION ORDER

Training Proposal for:
KRT Marketing, Inc.

Small Business
ET17-0311

Approval Date: December 14, 2016

ETP Regional Office: Sacramento  Analyst: K. Smiley

CONTRACTOR

- Type of Industry: Services
  Technology/Other
  Priority Industry: ☑ Yes ☐ No

- Number of Full-Time Employees
  California: 31
  Worldwide: 31
  Number to be trained: 28
  Owner ☐ Yes ☑ No

- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☑ Yes ☐ No
- High Unemployment Area (HUA): ☐ Yes ☑ No
- Turnover Rate: 1%
- Repeat Contractor: ☐ Yes ☑ No

FUNDING

- Requested Amount: $38,584
- In-Kind Contribution: $46,020
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate SET</td>
<td>Business Skills, Computer Skills</td>
<td>28</td>
<td>8-60</td>
<td></td>
<td>$1,378</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): Contra Costa
- Occupations to be Trained: Account Executives, Digital Strategist, Web/Graphic Designer, Administrative Staff, Owner
- Union Representation: ☐ Yes  ☑ No
- Health Benefits: N/A

SUBCONTRACTORS
- Development Services: Propel Consulting Group of El Dorado Hills assisted with development services for a flat fee of $2,894.
- Administrative Services: Propel Consulting Group will also assist with administration for a fee not to exceed 7.5% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1972 and located in Lafayette, KRT Marketing, Inc. (KRT) provides marketing and employee recruiting services for clients throughout the US. KRT also provides graphic and website design for business clients in an effort to help them market and brand services and products.

PROJECT DETAILS

KRT noticed that their business clients needed a faster and easier way to attract qualified employees. They understood that an effective software program could provide this, as well as cut costs associated with recruiting and hiring practices. In December of 2015, KRT licensed the software program, PPC Portfolio Manager, and customized the program to provide cutting-edge recruitment and advertising services for their clients. PPC Portfolio Manager accomplishes this...
by using the candidate’s data to create a snapshot of qualifications. This provides insight into the effectiveness of the company-specific job posting. Trainees require Computer Skills training to become proficient in the PPC Portfolio Manager software and provide clients with competent potential recruits.

KRT has also developed an in-house Green Belt Certification Training Program that all trainees will participate in. The training will focus on Business Skills and the services offered by KRT. These business services include Google Analytics, Cost Effective Media Solutions and Branding. Training on these topics will ensure staff has the resources and knowledge to recommend and execute the services offered by KRT to clients.

Training Plan

Internal subject matter experts and vendors will deliver class/lab and ELearning training.

**Business Skills:** Training will be delivered to all occupations to enhance customer satisfaction and operational efficiencies. Courses will include Project Management, Product Training, Client Services, and Recruitment Advertising.

**Computer Skills:** Training will be delivered to all occupations to increase understanding of client needs and marketing tools. Courses will include Google Analytics, Advanced Adobe, QuickBooks Software and Sales, and PPC Portfolio Manager.

**SET**

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.
Exhibit B: Menu Curriculum

Class/Lab/E-Learning Hours

8-60 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Business Performance
- Sales Skills
- Presentation Skills
- Project Management
- Communication Skills
- Client Services
- Product Training
- Data Analysis
- Recruitment Advertising
- Talent Acquisition Strategies
- Workforce Analytics
- Business Writing
- Leadership Training
- Problem Solving & Decision Making
- Team Building
- Coaching

**COMPUTER SKILLS**
- Intermediate and Advanced MS Excel
- Intermediate and Advanced MS Word
- Google Analytics Training
- Google Analytics Certification
- Leveraging LinkedIn
- Clickcast Software Training
- QuickBooks Software Training
- Advanced Adobe

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery
DELEGATION ORDER

Training Proposal for:
Lantronix, Inc.

Small Business
ET17-0341

Approval Date: December 7, 2016
ETP Regional Office: San Diego  Analyst: J. Davey

CONTRACTOR

- Type of Industry: Manufacturing
  Technology/Other
  Priority Industry: Yes No

- Number of Full-Time Employees
  California: 84
  Worldwide: 116
  Number to be trained: 81
  Owner Yes No

- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 6%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: $40,014
- In-Kind Contribution: $79,653
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainees Priority Rate SB &lt;100</td>
<td>Business Skills, Comm'l Skills, Computer, Continuous Improvement</td>
<td>81</td>
<td>8-60 0</td>
<td>$494</td>
<td>$16.51</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: $26 SB Priority
- County(ies): Orange
- Occupations to be Trained: Administrative Staff, Engineering, Managers, Sales Staff, Service Staff
- Union Representation: Yes No
- Health Benefits: N/A

### SUBCONTRACTORS

- Development Services: Lantronix, Inc. retained Welsh Advisors, Inc. in Orange to assist with development of this proposal for a flat fee of $2,379.
- Administrative Services: Welsh Advisors, Inc. will also assist with administration of this proposal for fee not to exceed 13% of funds earned.
- Training Vendors: To Be Determined
OVERVIEW

Founded in 1989 and headquartered in Irvine, Lantronix, Inc., (Lantronix) designs, develops, and markets network device servers that enable electronic devices to be managed, controlled, and re-programmed over the Internet or other networks. The Company also develops software and utilities that enable customers to create custom applications on its products. Customers include industries such as transportation, energy, retail, financial, government and other businesses that use the Internet to conduct business.

Lantronix is eligible for standard retraining under the Out-of-State Competition Provisions for industrially-classified manufacturers.

As a leader in networking devices, Lantronix is experiencing competition from domestic and international companies. To remain competitive, the Company is focused on employee development. The Company’s strategy has identified key business and technical skills which will result in highly proficient employees who understand the Company’s products and how they meet customer needs and compatibility standards.

In addition, the Company expects an estimated industry growth of 40% by the end of 2016. It’s imperative that Lantronix’s employees stay current with changes in technology, and internal changes including the development of new products and services. By investing in employee training and development, the Company will retain its existing workforce, and increase productivity and profitability in a competitive market.

Training Plan

Lantronix’s training program will focus on the development of its products, an improved quality management system, and increased sales and service. Training will be provided at the company’s headquarters in Irvine by a combination of internal and subcontracted training providers.

Lantronix’s customer-base is worldwide; therefore, all employees are required to know the Foreign Corrupt Practices Act guidelines that pertain to its business. Training will include accounting provisions, factors considered in corruption risk assessments, ways to avoid risk and reputational harm, and anti-corruption compliance. The Company requests ETP reimbursement for this training.

Business Skills: This training will be offered to Administrative Staff, Managers, Sales Staff, and Service Staff in Project Management, Legislative Updates and Foreign Corrupt Practices. Training will keep employees up to date with the legal provisions the Company must follow to avoid reputational harm and maintain compliance with US law (Foreign Corrupt Practices Act). Project Management skills will allow employees to work more efficiently and effectively on projects, individually and with a team.

Commercial Skills: This training will be offered to Engineering, Sales, and Service Staff in technical tools to perform their jobs more effectively. Sales and Service Staff will receive training in New Products to keep them up-to-date on the latest products so that they will better serve the Company’s customers.

Computer Skills: This training will be offered to Administrative Staff, Managers, Sales Staff, and Service Staff in Office 365, Salesforce, and Oracle. Training will provide the necessary skills in software that will improve company productivity and facilitate the sales and marketing of the Company’s products.
Continuous Improvement: This training will be offered to all trainees in ISO Certification training. The training will provide every employee with a vital understanding of standards and updates in the field of information technology which impact the business.

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
- Foreign Corrupt Practices
- Project Management
- Legislative Updates
- Leadership Skills

COMMERCIAL SKILLS
- Engineering Techniques & Tools
- New Products

COMPUTER SKILLS
- Salesforce
- Oracle
- MS Office 365 – Intermediate/Advanced

CONTINUOUS IMPROVEMENT
- ISO training

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
Training Proposal for:
Lusive Décor

Small Business

ET17-0374

Approval Date: December 20, 2016

ETP Regional Office: North Hollywood  Analyst: M. Webb

CONTRACTOR

• Type of Industry: Manufacturing
  Services
  Priority Industry: ☒ Yes ☐ No

• Number of Full-Time Employees
  California: 66
  Worldwide: 66
  Number to be trained: 50

• Out-of-State Competition: Competitors Outside CA
  Owner ☒ Yes ☐ No

• Special Employment Training (SET): ☐ Yes ☒ No
• High Unemployment Area (HUA): ☐ Yes ☒ No
• Turnover Rate: 13%
• Repeat Contractor: ☒ Yes ☐ No

FUNDING

• Requested Amount: $96,200
• In-Kind Contribution: $111,371
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority Rate SB &lt;100</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills</td>
<td>50</td>
<td>8-200</td>
<td>0</td>
<td>$1,924</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg:</td>
<td>74</td>
<td>$16.48</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Administration Staff, Designer, Manager, Owner, Production Staff
- Union Representation: ☐ Yes  □ No
- Health Benefits: Job #1: $1.48 per hour

**SUBCONTRACTORS**

- Development Services: California Manufacturing Technology Consulting (CMTC) in Torrance assisted with development of this proposal. [Note: CMTC is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000. In this proposal, there is no fee.]
- Administrative Services: CMTC will also provide administrative services for a fee not to exceed 13% of the total contract amount.
- Training Vendors: N/A

**OVERVIEW**

Founded in 2002, Lusive Décor ([www.lusive.com](http://www.lusive.com)) is a design-based manufacturing firm located in Los Angeles. The Company designs and manufactures customized concepts for lighting fixtures. Additional services include installation, shipping, consultation, and management. Lusive Décor's subsidiary, LUXE, also manufactures high-end light fixtures and is located at the same Los Angeles address. The two companies share facilities, management and reporting systems, and administrative facilities. Employees from both companies will participate in training under this Agreement. This will be Lusive Décor's second ETP Agreement.
Lusive Décor offers customers an exclusive selection of finishes and specialized products that are designed to specification. Materials for Lusive Décor are sourced from countries such as Italy, Austria, Brazil, India, and The Philippines.

Hospitality purchasing agents are a major source of market share. Clients include the Four Seasons, Hilton Worldwide, Wynn Resorts, and Hyatt, Hard Rock, and Omni Hotels. Since 2010, Lusive Décor has been listed in *Inc. Magazine’s* Top 5000 Fastest Growing U.S. Companies.

Under the prior ETP Agreement training focused on development and design in the hospitality industry, and implementation of Lean manufacturing skills (5S), with energy efficient alternatives such as LED lighting/lamps. Lusive Décor has now expanded its business to retail markets and direct-to-consumer transactions. As such, new designs and products are being developed for home décor rather than solely for the hospitality industry. Training topics will introduce sale options for direct-to-consumer and retail transactions; new steps required in the production processes to manufacture and customize design requests; and software programs to determine price points, shipping, and design alternatives.

**Training Plan**

Training will be delivered by in-house instructors in the following areas:

**Business Skills:** Training will be delivered to Administrative Staff and Managers to improve customer service skills and effectively utilize financial information to prioritize capital equipment and operations.

**Computer Skills:** Training will be delivered to all occupations to ensure staff is able to use the company’s computer software programs for better project management. Training topics will include Microsoft Office (Excel/Word), Website Design and maintenance, and Computer-Aided Design (CAD).

**Manufacturing Skills:** Training will be delivered to Production Staff, Designers, and Managers to increase staff product knowledge and introduce new production and assembly standards. Training will ensure staff can manage higher productivity levels and minimize re-work in the production process.

**Continuous Improvement:** Training will be delivered to all occupations to improve sales, production cycles, and customer retention. Training courses provided will improve staff ability to identify and implement operational improvements, and increase employee teambuilding and communication skills.

**Training Hour Limitation**

Retraining hours for small business are capped at 60 hours per-trainee. However, Lusive Décor is asking for a modification of the cap. Designers, Managers and Owners will participate in training focused on company initiatives and new concepts to grow the business. Hours of training are estimated at approximately 24 to 54 for Customer Service Skills and 18 to 110 for Continuous Improvement. A substantial amount of Computer Skills training will also be provided in new software.

The training plan may result in training of approximately 150-200 hours for a half-dozen employees. To maximize training opportunities, Lusive Décor requests approval to offer staff the maximum amount of up to 200 training hours, per trainee.
RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0358</td>
<td>Los Angeles</td>
<td>12/09/14-12/08/16</td>
<td>$49,920</td>
<td>$49,920 (100%)</td>
</tr>
</tbody>
</table>
Class/Lab Hours

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Customer Service
- Financial Statements
- QuickBooks

**COMPUTER SKILLS**
- BaseCamp
- Computer Aided Design (CAD)
- PowerPoint Presentation Skills
- Website Design & Maintenance
- Enterprise Resource Planning (ERP)
- Microsoft Office
  - Outlook
  - Word (Intermediate/Advanced)
  - Excel (Intermediate/Advanced)
- Asana

**CONTINUOUS IMPROVEMENT**
- Time Management & Organizational Skills
- Peak Performance/Process Improvement
- Project management
- Teams, Team Management & Team Building
- Five S (5S)
- Leadership Skills
- Lean Enterprise
- Communication Skills
- Quality Standards

**MANUFACTURING SKILLS**
- 3d Printing
- Machine & Tool Operation
- Tool & Tool Corral Organization
- Soldering
- Electrification
- Crating, Packing, and Shipping
- Shop Systems
- Maintenance
- Blueprint Reading
- Production Tracking

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

Retainee - Job Creation
Training Proposal for:
Medical Illumination International, Inc.

Small Business

Approval Date: December 15, 2016

ETP Regional Office: North Hollywood   Analyst: M. Niquet

CONTRACTOR

- Type of Industry: Manufacturing
- Priority Industry: ☑ Yes ☐ No
- Number of Full-Time Employees
  California: 60
  Worldwide: 60
  Number to be trained: 43
- Owner: ☑ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☑ No
- High Unemployment Area (HUA): ☐ Yes ☑ No
- Turnover Rate: 18%
- Repeat Contractor: ☐ Yes ☑ No

FUNDING

- Requested Amount: $49,972
- In-Kind Contribution: $51,652
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraining</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Literacy Skills, Management Skills, Manufacturing Skills</td>
<td>40</td>
<td>8-120</td>
<td>$1,140</td>
<td>$16.48</td>
</tr>
<tr>
<td>2</td>
<td>Retraining</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Literacy Skills, Management Skills, Manufacturing Skills</td>
<td>3</td>
<td>8-120</td>
<td>$1,404</td>
<td>*$13.73</td>
</tr>
</tbody>
</table>

*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 SB Priority
- **County(ies):** Los Angeles
- **Occupations to be Trained:** Administrative Staff, Customer Service Staff, Engineering Staff, Managers/Supervisors, Owner, Production/Manufacturing Staff
- **Union Representation:** ☐ Yes ☑ No
- **Health Benefits:** Job #'s 1 & 2: $3.22 per hour

### SUBCONTRACTORS

- **Development Services:** California Manufacturing Technology Consulting (CMTC) in Torrance assisted with development of this proposal. [Note: CMTC is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000. In this proposal, the fee will be $4,997.20. This fee does not affect the approved amount of funding.]
- **Administrative Services:** CMTC will provide administrative services for a fee not to exceed 13% of payment earned.
- **Training Vendors:** CMTC will provide training services. Cost of training to be determined.
OVERVIEW

Founded in 1978 and headquartered in San Fernando, Medical Illumination International, Inc. (MII) (www.medillim.com), manufactures medical lighting for human and veterinary medical fields. These products are available to veterinary and medical offices and facilities worldwide. Products include surgical lighting and video systems, surgical tables, equipment management systems, minor surgical and office based procedural lighting equipment, and examination lights. This will be MII’s first ETP agreement.

Need for Training

With the changing and expanding requirements in the medical devices industry, which include a Unique Device Identifier system for bar coding all medical devices worldwide and the change in the International Electrical Commission standards, manufacturing MII’s products require a high level of new workforce expertise and training. Meeting these quality standards is important for MII to continue doing business worldwide. Training will provide the Company with opportunities to bid on jobs that require FDA and international quality standards.

MII has also upgraded their Enterprise Resource Planning (ERP) to Quality System software to improve operations. Training in this area is critical to growth of the organization.

Retrainee - Job Creation

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

MII recently closed down their Pennsylvania operations and moved the entire manufacturing function to California. As MII continues to grow, the Company is upgrading its systems to ensure employees can support the Company’s strategic growth plans.

As a result of Company growth and relocation to California, MII has committed to hiring 3 new employees (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

Temporary to Permanent Hiring

MII will train 4 workers in Job Number 1, and 3 workers in Job Number 2, under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. The average time for “converting” temporary workers into full-time permanent employment is 3 months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled as trainees until after they have been hired by MII 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 Plan

Training will be provided at the San Fernando facility by a combination of in-house experts and vendors in the following:

**Business Skills:** Training will be offered to Customer Service, Manager, and select Production and Engineering Staff to provide skills to effectively interact with customers; better assess and meet customer expectations; manage priorities, and identify opportunities to increase sales.

**Literacy Skills:** Training will be offered to Production Staff that would benefit from Vocational English as a Second Language. Training will bridge the language barrier that impacts trainee job effectiveness and to provide them with the knowledge to better participate in other training that MII will make available to its workforce.

**Management Skills:** Training will be offered to Management staff, providing the skills necessary to move the Company’s strategic vision forward and manage teams.

**Computer Skills:** Training will be offered to all occupations to ensure that staff has the skills to effectively utilize the new ERP system and improve operational effectiveness. Staff will be offered training in CAD/CAM and Bar coding to ensure they possess the technical knowledge to fulfill their job duties and meet both customer and industry requirements. These trainings will ensure that staff has the knowledge to be most effective in their roles.

**Manufacturing Skills:** Training will be offered to Production and Management staff to provide technical knowledge, the ability to read blueprints & conduct operating functions. This training will meet industry requirements, including European and FDA requirements for medical devices.

**Continuous Improvement:** Training will be offered to all occupations to ensure employees can support the Company in its efforts to gain and/or sustain customer and industry-required quality certifications. This training will improve efficiencies and operations through the implementation of lean, problem solving, team building and related training.

**Modifications**

**Contract Term Limitation**

MII is requesting a 24-month agreement term. The additional 12 months facilitate rollout of their new ERP system to be completed in multiple cycles. As different elements of the system are customized and implemented, employees will receive training. Training will be conducted several weeks at a time, and then the focus will shift to customizing the next module over several weeks, followed by more training. This cycle will be repeated several times. While the ERP system is undergoing customization, MII will continue focus on other training needs. As such, training will be continuous over an 18 to 21-month period.

**Training Hours Limitation**

Key Administrative, Engineering, Production and Management Staff need up to 120 hours of training depending on their roles and responsibilities. These employees will become in-house experts. The Company will also develop ERP super users who will be MII’s knowledge base for the Company. The additional training hours will better equip these workers to implement quality and continuous improvement initiatives. Thus the Company is requesting a waiver to the maximum training hours’ requirement for Small Business, from 60 to 120 hours.
RECOMMENDATION

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-120 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Sales Skills
- Business Writing
- Conflict Management
- Effective Meeting Skills
- Financial Analysis Skills
- Goal Setting
- 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 (ERP)
- Electronic Commerce and eBusiness
- Word Processing (Intermediate & Advanced Level) MS Office
- Spreadsheets (Intermediate & Advanced Level) MS Office
- Presentation Software
- Database Management
- CAD/CAM Software Training
- Bar-coding and FDA Requirement Training

**CONTINUOUS IMPROVEMENT**
- Teams and Team Building
- Problem Solving
- Communication Skills
- Leading Change
- Leadership Skills
- Lean Manufacturing
- Environmental Management System (EMS) Implementation
- Six Sigma
- Design of Experiments (DOE)
- Failure Mode and Effects Analysis (FMEA)
- Quality Function Deployment (QFD) and New Management & Planning Tools
- Improving Process Cycle Times
- Quality Management Systems
- Internal Auditor
- Quality Inspection
- Risk Management
• Supply Chain Optimization

**MANAGEMENT SKILLS (Managers and Supervisors Only)**
• Management/Supervisory Skills
• Strategic Planning and Policy Deployment

**MANUFACTURING SKILLS**
• Programmable Logic Controllers
• Soldering
• Blueprint Reading
• Shop Math and Geometric Dimensioning & Tolerancing
• CNC Programming & Operation
• Surface Mount Technology: Manufacturing & Rework
• Printed Wiring Board Repair
• Through Hole Technology: Rework and Repair
• Productions Skills
• FDA Good Manufacturing Practices (GMP)
• FDA Good Laboratory Practices (GLP)
• Small Batch Manufacturing
• Large Batch Manufacturing
• Biotech Research and Development
• Metrology
• Writing Standard Operating Procedures (SOPs)
• Biotechnology Design Control
• Product Submissions: Getting to Market
• Quality System Requirements, Good Manufacturing Practices & Inspections
• Medical Devices and the European Market
• Requirements for Device Safety
• Manufacturing Logistics Management
• Forklift Training and Certification

**LITERACY SKILLS**
• Vocational English as a Second Language (VESL)

---

**Note:** Reimbursement for retraining is capped at 120 total training hours per trainee, regardless of the method of delivery. Literacy skills training will not exceed 45% of the training.
Training Proposal for:
Milwood Healthcare, Inc. dba Maywood Acres Healthcare

Small Business

ET17-0339

Approval Date: December 9, 2016

ETP Regional Office: North Hollywood  Analyst: L. Vuong

CONTRACTOR

• Type of Industry:
  Healthcare
  Services
  Priority Industry: ☒ Yes ☐ No

• Number of Full-Time Employees
  California: 91
  Worldwide: 91
  Number to be trained: 57
  Owner ☐ Yes ☒ No

• Out-of-State Competition:
  No OSC

• Special Employment Training (SET): ☒ Yes ☐ No

• High Unemployment Area (HUA): ☐ Yes ☒ No

• Turnover Rate: 6%

• Repeat Contractor: ☐ Yes ☒ No

FUNDING

• Requested Amount: $77,688

• In-Kind Contribution: $64,320
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SET Priority Rate Medical Skills Training</td>
<td>Computer Skills, Continuous Improv., MS-Clinical w/Preceptor, MS-Didactic</td>
<td>39</td>
<td>8-60 0</td>
<td>$1,560</td>
<td>$21.28</td>
</tr>
<tr>
<td>2</td>
<td>Retrainee SET Priority Rate Medical Skills Training Multiple Barriers</td>
<td>Computer Skills, Continuous Improv., Literacy Skills, MS-Clinical w/Preceptor, MS-Didactic</td>
<td>18</td>
<td>8-60 0</td>
<td>$1,560</td>
<td>*$15.60</td>
</tr>
</tbody>
</table>

*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 SB Priority
- **County(ies):** Ventura
- **Occupations to be Trained:** Licensed Vocational Nurse, Registered Nurse, Certified Nurse Assistant, Cook Staff, Dietary Staff, Social Services Staff, Housekeeper/Maintenance Staff
- **Union Representation:** ☑ Yes ☒ No
- **Health Benefits:** Job #1: $2.03 per hour Job #2: $2.80 per hour

### SUBCONTRACTORS

- **Development Services:** National Training Systems, Inc. (NTS) in Ladera Ranch assisted with development of this proposal for a flat fee of $4,600.
- **Administrative Services:** NTS 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
OVERVIEW

Established in 2007 and located in Oxnard, Milwood Healthcare, Inc. dba Maywood Acres Healthcare (Maywood) is a long-term skilled nursing care facility that provides medical, emotional and social services for individuals who no longer require acute hospitalization but have ongoing medical needs at the hospital-based skilled nursing level. Maywood services include daily living activities, catheter management, medication management, audiology, on-site dental care, hospice, occupational therapy, diabetes management care, arthritis, asthma, colostomy care, heart disease, I.V. management, feeding tubes management, osteoporosis, Parkinson’s disease, psychiatric conditions such as bipolar/manic depression, Alzheimer’s and dementia care, home therapy assessment services. The Company also offers a range of recreational activities such as painting and games. Maywood operates a ninety-eight bed facility twenty-four hours a day. Seven days a week.

Maywood’s business environment is rapidly changing as a result of the Affordable Care Act (ACA) which includes reduced reimbursement, new quality standards and new technology. In addition, the industry is seeing an aging and increasingly sick patient population which continues to transform Maywood’s core business.

Maywood is seeking ETP funding for training in the following areas:

- Healthcare Reform resulting in New Quality Standards
- Reduced Reimbursement-Higher Service costs
- Higher Acuity Patients Requiring Extensive and Advanced Care
- Increased Rate of Admission and Discharge of Patients-Shorter Stays.
- Penalties for Preventable Hospital Readmissions
- New Computer Software

Maywood is in the healthcare and medical services industry, and is eligible for priority industry reimbursement. This will be Maywood’s first ETP Agreement. All training will be held in Oxnard.

Training Plan

Maywood’s goal is to upgrade worker skills to meet clinical quality measures, ensure optimal levels of patient care, improve customer services and stay current with healthcare standards and technological advances. Training will enable workers to gain experience, increased proficiency, the ability to manage complex systems, and the skills to remain current with industry standards and requirements.

Maywood’s strategic plan for 2016-2017 calls for significantly increased training for nurses and allied health positions. Maywood plans to train up to 57 employees, including 34 Licensed Vocational/Registered Nurses (LVN/RN), 12 Certified Nurse Assistants; and 11 other Allied Healthcare staff.

Class/Lab, Videoconference and Medical Skills (Clinical and Didactic) training will be provided. Training is scheduled to begin upon Panel approval and will be delivered on-site by in-house subject matter experts. Training vendors will be identified during the term of the proposed Agreement, if needed.
Computer Skills – This training will be offered to all occupations in the use of Electronic Medical Records software to accurately enter and retrieve patient information, and in Microsoft software to help improve accuracy and reporting of daily activities.

Continuous Improvement – This training will be offered to all occupations in order to foster improvement in multiple skills such as team building, culturally appropriate care, medical records, documentation; customer service; standard operating procedures; communication skills; interdisciplinary team skills and quality improvement.

Literacy Skills – This training will be provided to Certified Nurse Assistant and Cook Staff. This training will enable employees with limited English skills to increase their speaking, listening and comprehension skills in the workplace.

Medical Skills Training Clinical Preceptor/Didactic – This training will be provided to all nursing and clinician staff. Trainees will participate in Clinical Preceptor and Didactic training, based on the complexity of their patient care responsibilities. Trainees will gain and focus on healthcare requirements, clinical process including patient assessment, care and treatment and specific skills to ensure that trainees are competent in advanced medical procedures.

Special Employment Training

Under Special Employment Training (SET), employers are not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period ($21.28).

This SET project will also target workers (Certified Nurse Assistant, Cook Staff, Dietary Staff and Housekeeper/Maintenance Staff) with multiple barriers to employment, who lack essential job skills necessary to improve their employment opportunities. They may be affected by lack of prior educational opportunities and intermittent work histories. They may have several barriers to employment, as well as limited literacy skills, and an inconsistent employment.

Wage Modifications

Trainees in Job Number 1 are employed in a Priority Industry and qualify for a SET wage modification up to 25% below the statewide average hourly wage. The wage modification from $28.37 to $21.28 is requested for trainees in Job Number 1.

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 multiple barrier trainees are eligible to receive the ETP Standard Wage of $15.60 per hour for Ventura County. Maywood is requesting this wage modification for Job Number 2.

RECOMMENDATION

Staff recommends approval of this proposal, including the post-retention wage modifications.
Class/Lab Hours

8-60  Trainees may receive any of the following:

**COMPUTER SKILLS**
- Electronic Medical Records Application Skills
- Microsoft Applications
- Patient Services Billing Software
- Electronic Tablet
- Point Click Care

**CONTINUOUS IMPROVEMENT**
- Administration
- Medical Records
- Customer Service
- Communication Skills
- Problem Analysis and Problem Solving
- Clinical Services System Management
- Interdepartmental Collaboration
- Interdisciplinary Team
- Incident/Accident Management
- Resident Centered Care
- Mobility Skills
- Skill Competency Clinical and Non-Clinical Staff
- Documentation
- Continuous Quality Improvement Workshop
- Culturally Appropriate Care
- Team Building

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

- Vocational English (Nursing terminology)
- Mathematics (metrics/Conversion)

**MEDICAL SKILLS TRAINING - DIDACTIC**
- Restorative Nursing Program
- Infection Control
- Change of Condition Management
- Interdisciplinary Team Process
- Pain Management (Acute and Chronic)
- Intravenous Therapy
- Enteral Management
- Respiratory Care
- Wound Management
- Diabetic Management
- Urinary Management
• Resident and Family Education
• Medication Administration Management
• Restraint and Restraint Reduction
• Behavior Management
• Psychotropic Medication Management
• Patient Assessment & Care
• Physical, Occupational, Speech Therapy
• End of Life Care
• Patient Fall Prevention
• Dementia/Alzheimer’s
• Neurovascular System
• Residents with Special Needs
• Gastrointestinal System
• Laboratory
• Cardiac Conditions
• Neurological Conditions
• Resident Emergency Response
• Skeletal/Orthopedic Conditions
• Incontinence Management
• Pro Act Training - Professional Assault Crisis Training and Certification (Pro Act)

MEDICAL SKILLS TRAINING – CLINICAL PRECEPTOR

Inpatient Care Unit
• Medication Management
• Infection Control
• Patient Safety
• Clinical Skills Review
• Patient Assessment and Care
• Intravenous Therapy

Enteral Management
• Bolus
• Intermittent
• Continuous

Feeding Tube
• Insertion
• Site Care
• Removal
• Assessing Patients Receiving Tube Feedings
• Assessing of Tube-Fed Individuals with Diabetes Mellitus
• Preventing and Identifying Complications Related to Tube Feedings
• Respiratory Care
• Wound Management
• Dementia/Alzheimer’s
• Managing Patients with Neurovascular Conditions
- Residents with Special Needs
- Gastrointestinal Conditions
- Cardiac Conditions
- Skeletal/Orthopedic Conditions
- Incontinence Management

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

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
Training Proposal for:

Monterey Bay Analytical Services, Incorporated

Small Business

ET17-0423

Approval Date: January 26, 2017

ETP Regional Office: San Francisco Bay Area

Analyst: L. Molinar

CONTRACTOR

- Type of Industry: Services
  Environmental Testing
- Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 8
  Worldwide: 8
  Number to be trained: 8
- 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: $7,488
- In-Kind Contribution: $6,300
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine  Priority Rate SB &lt;100</td>
<td>Commercial Skills, Computer Skills, Continuous Improvement</td>
<td>8</td>
<td>8-80 0-23</td>
<td>$936</td>
<td>$20.00</td>
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</table>

- Reimbursement Rate: $26 SB Priority
- $8 CBT
- County(ies): Monterey
- Occupations to be Trained: Laboratory Analyst, Chemist, Business Manager, Laboratory Director (Owner)
- Union Representation: ☑ Yes ☐ No
- Health Benefits: N/A

SUBCONTRACTORS
- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: UCSC Silicon Valley Extension, Santa Clara; Alliance Career Training Solutions, Salinas; and Accelerated Technology Laboratories, Inc., West End, NC will provide Computer Skills. Perkin Elmer Inc., San Jose and O-I Analytical, College Station, TX will provide Commercial Skills.

OVERVIEW

Founded in 1999, Monterey Bay Analytical Services, Incorporated (MBAS) (http://www.mbasinc.com) provides laboratory testing, analysis, and collection of water samples. This includes drinking water, wastewater, runoff and agricultural water. MBAS tests water samples to determine drinkability, suitability for irrigation, corrosiveness, and compliance with regulation. Customers include farm owners, private and public drinking water and treatment systems, regulatory and environmental agencies, and researchers from local universities.

Need for Training

This will be MBAS’ first ETP-funded training project. The Company recently updated its Laboratory Information Management System (LIMS) and purchased new testing equipment.
Prompted by customer requirements, the updated LIMS will allow the Company to fully track samples and all associated test data, and create reports in the various formats required by clients. MBAS requires training for employees to customize the system, as the data is complex and each customer has specific needs. The Company is currently providing basic and intermediate training in Excel, Access, Visual Basic, and Database and Data Analytics. Some training will cover job skills necessary to interface this software with the LIMS.

MBAS also purchased new testing equipment: a new Flow Injection Analyzer and a new ICP Mass Spectrometer, installed in early January. The new ICP Mass Spectrometer will detect trace metals at lower detection levels, increasing the precision of results of several currently provided tests and allowing it to provide a new testing service on seawater. The Flow Injection Analyzer will allow MBAS to quickly analyze samples for nutrients at extremely low detection levels, giving faster, more detailed results. Training in both instruments will allow the Company to provide quality testing services to clients. Vendors will train a designated Laboratory Analyst, who will then train other employees on the equipment. ETP funding will be used for this additional training.

**Training Plan**

MBAS provides training to employees in Continuous Improvement, Computer and Commercial Skills, but must expand and supplement its on-going training program. Training will be provided primarily by external vendors via class/lab and Computer-Based Training (CBT). The new LIMS and equipment each have an employee assigned as the Subject Matter Expert (SME). SMEs will receive training directly from the equipment and software provider, and staff at the Company’s facility.

MBAS has assigned a Laboratory Analyst to work directly with ETP in documenting training and handling all other administration.

**Commercial Skills:** Training will be offered to all occupations, but focus on Laboratory Analysts. Analysts will receive training on operating the Flow Injection Analyzer and ICP Mass Spectrometer, which will improve several company services and provide additional testing services.

**Computer Skills:** Training will be offered to all occupations. LIMS requires training on the new system and associated programs to customize the new LIMS to the Company’s requirements and obtain the necessary skills to update the LIMS as standards change. The Chemist will train in Databases and SQL at UCSC Silicon Valley Extension. Training also includes Access, Visual Basics, Crystal Reporting, and Excel, required to work with the new LIMS and manage the large amounts of data produced by the lab. This training will supplement company provided over the last few years.

**Continuous Improvement:** Training will be offered to all occupations, and include problem solving, data integrity, quality control and program flow. This training will assist employees in better performing their duties, and will allow MBAS to stay competitive with larger laboratories.

**Computer Based Training:** Training will be offered to all occupations in Commercial Skills and Continuous Improvement. MBAS has identified two training vendors offering courses tailored to testing laboratories, which will assist employees to stay current on updated requirements and methodologies. These self-paced courses will provide greater flexibility in training, as they can be done on an individual basis when employees’ have downtime.

**E-Learning:** Training may be offered to all occupations for all training types. Most training will be delivered in Class/Lab, but several courses may be offered in the E-Learning format to save travel costs.
Out-of-State Vendor

MBAS purchased its new Model 3700 Analyzer from O-I Analytical, and requires extensive training on the new instrument. O-I Analytical, based in Texas, is the equipment manufacturer, and the only provider of training on this instrument. O-I Analytical would send a representative to MBAS’ site in Monterey to train employees on the new instrument.

This out-of-state vendor has been approved in accordance with standard procedures.

Out-of-State Training

MBAS purchased the Sample Master LIMS from Accelerated Technology Laboratories, Inc. (ATL), headquartered in Pinehurst, North Carolina. ATL offers training webinars on basic concepts, as well as a “Boot Camp”, in North Carolina, which covers a more advanced overview of material not included in the webinars. This Boot Camp was not included in the price of the LIMS, but would assist MBAS greatly in configuring its new system. The Company will send one Laboratory Analyst to this Sample Master course in North Carolina, who would then train the Company’s other employees upon their return.

As this training cannot be obtained elsewhere, MBAS has been approved for out-of-state training in accordance with standard procedures.

Trainer-to-Trainee Ratio Waiver

The Sample Master course offered by ATL is offered twice per year and may have up to 26 attendees (verified by staff). This training is focused on configuring the Sample Master system, which addresses a key component of MBAS’ training needs. It will show employees how to apply the other computer skills training in configuring the LIMS, to interface with Access, Excel, Crystal Reports and Visual Basic. Due to the need for a technical training provider with specialty expertise, MBAS requests a trainer-to-trainee ratio of 1:26 for this course only, to make its delivery cost-effective.

Maximum Hours Waiver

MBAS requests a waiver to increase the maximum training hours from 60 hours to 80, for four trainees. The Company has a training plan in place for all employees, with an average of 20 hours class/lab and 20 hours CBT training. Four employees, however, need additional specialized training on the new LIMS and new equipment. The Chemist will oversee the LIMS transition and setup, and will receive 48 additional training hours in Database systems to assist with the process.

A Laboratory Analyst will assist the Chemist to configure the LIMS, and will attend the 24-hour Sample Master course in North Carolina for additional training. A Laboratory Analyst is assigned to each testing machine as an SME, each of whom requires an additional 24 to 32 hours of training on the equipment in order to achieve mastery. MBAS seeks an increase of the maximum training hours to accommodate the additional hours of training for these employees.

RECOMMENDATION

Staff recommends approval of this proposal including the training ratio waiver, maximum hours’ waiver, and out-of-state training and vendor requests.
Class/Lab/E-Learning Hours

8-80 Trainees may receive any of the following:

COMMERCIAL SKILLS
- Mass Spectrometer
- Flow Injection Analyzer

COMPUTER SKILLS
- Excel
- Excel Programming with VBA
- Visual Basics
- Crystal Reports
- Access
- MySQL
- SQL Querying
- Database and Data Analytics
- Network Security Training
- SampleMaster LIMS

CONTINUOUS IMPROVEMENT
- Data Analysis
- Problem Solving
- Quality Control
- Developing/Improving Control Charts
- Data Integrity
- Water Quality Monitoring Design

CBT Hours

0-23

COMMERCIAL SKILLS
- Theoretical and Practical Consideration for Establishing Sensitivity of Measurements (2 Hrs)
- Working with the New MDL (1 Hr)
- Pathogens in Drinking Water: Preventing Disease Outbreaks in Your Water System (2 Hrs)
- Drinking Water Wells, Storage Tanks & Water Hydrology: Monitoring What We Cannot See (2 Hrs)
- Water Supply & Sources (2 Hrs)
- Water Treatment Techniques (2 Hrs)
- Revised Total Coliform Rule (2 Hrs)
CONTINUOUS IMPROVEMENT

- Corrective Action Process and Root Cause Analysis (2 Hrs)
- Internal Audits and Management Review (2 Hrs)
- Method Selection and Validation (2 Hrs)
- Testing Requirements in EPA Regulations (1.5 Hrs)
- The 2012 EPA Method Update Rule (1 Hr)
- The 2015 EPA Method Update Rule (1 Hr)

Note: Reimbursement for retraining is capped at 80 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per-trainee.
DELEGATION ORDER

Training Proposal for:
Moore Benefits, Inc.

Small Business

ET17-0393

Approval Date: January 4, 2017

ETP Regional Office: San Diego

Analyst: M. Ray

CONTRACTOR

- Type of Industry: Financial Services
  
  Priority Industry: [ ] Yes [x] No

- Number of Full-Time Employees
  
  California: 5
  Worldwide: 5
  Number to be trained: 5

  Owner: [x] Yes [ ] No

- Out-of-State Competition: No OSC
- Special Employment Training (SET): [x] Yes [ ] No
- High Unemployment Area (HUA): [ ] Yes [x] No
- Turnover Rate: 16%
- Repeat Contractor: [x] Yes [ ] No

FUNDING

- Requested Amount: $6,600
- In-Kind Contribution: $11,400
TRAINING PLAN TABLE

<table>
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<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SET SB &lt;100</td>
<td>Business Skills, Commercial Skills, Computer Skills</td>
<td>5</td>
<td>8 - 120</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Class / Lab: 60</td>
<td>CBT: 0</td>
<td>Weighted Avg: 60</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: $22 SB Non-Priority
- County(ies): Orange
- Occupations to be Trained: Account Management/Sales, Customer Service, Owner
- Union Representation: ☑ Yes
  ☑ No
- Health Benefits: Up to $1.92 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach will assist with development of this proposal for a flat fee of $200.
- Administrative Services: TFS will also assist with administration for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2001, Moore Benefits, Inc. (Moore Benefits) (www.moorebenefits.com) is a full-service employee benefits consulting company that provides brokerage, administration, education, and advocacy services for small- to mid-sized businesses. A small business located in Irvine, the Company delivers customized employee benefit plans to help companies resolve insurance issues, track enrollment, reconcile invoices, and set-up reductions to align with the unique needs of its customers and maximize return-on-investment.

Need for Training

This will be Moore Benefits' second ETP Agreement. In the previous Agreement, the Company provided a comprehensive training program to support the Company in light of increased regulatory changes brought about by various legislations including the Affordable Care Act (healthcare reform). Moore Benefits was able to provide its trainees between 77 and 120 hours of Business, Commercial, and Computer Skills training to become industry experts and successfully support its customers. Some curriculum topics in this proposal are repeated from the prior agreement; however, the subject matter has been updated and/or improved. Thus, there will be no duplication of training.
Moore Benefits is challenged to comply with increased standards and requirements imposed by new legislation. For example, in 2016, the Affordable Care Act (ACA) was expanded requiring employers to file information returns with the IRS and provide statements to their full-time employees regarding the employer’s health insurance offerings. These requirements have dramatically increased workload, requiring the Company to improve efficiency and productivity. The Company must implement new processes and new modules of its software systems to continue providing exemplary customer service. Training will improve workforce skills while enabling the Company to stay current with new laws and regulations.

Additionally, Moore Benefits has implemented new products, such as Health Reimbursement Arrangements, and upgraded services of Individual and Family Plans. Training will allow the Company to remain competitive by providing customers comprehensive benefits packages tailored to individual needs.

Training Plan

ETP training will begin upon approval and will be delivered by in-house trainers at the worksite.

Business Skills – Training will be delivered to all occupations. Course topics include conflict resolution, customer service, marketing & sales skills, project management, team building, change management, and process/quality improvement. Training will skills to improve customer service and increase productivity.

Commercial Skills – Training will be delivered to all occupations. Extensive training in employee benefits regulations, product knowledge, and ACA Reporting requirements will be provided to all trainees in order to successfully design benefits programs and provide correct rates to its customers. Training will also include asset tracking, request for proposal (RFP) management, and website security procedures.

Computer Skills – Training will be delivered to all trainees. Training in Employee Navigator will provide trainees skills to effectively handle all administrative services to support clients. Course topics also include Adobe, Agency Management Systems, Microsoft Office, Agency Bloc, GoToMeeting, and various Insurance Carrier Website Enrollments such as Aetna, Anthem, HealthNet, Kaiser, and Principal.

SET

Moore Benefits is eligible for ETP funding under Special Employment Training (SET) provisions for frontline workers. Under SET, an 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.

Modifications

Increase in Range of Hours

Moore Benefits is requesting an increase to the maximum hours for Small Business (from 60 to 120 hours). Increasing the maximum hours will allow the Company to provide some core trainees significant amount of commercial skills training to support its initiatives mentioned above.
**Contract Term**

Moore Benefits requests a 24-month term to better allow sufficient time for trainees to complete significant Commercial Skills training initiatives within the organization.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0209</td>
<td>Irvine</td>
<td>08/04/2014–08/03/2016</td>
<td>$6,864</td>
<td>$6,864 (100%)</td>
<td></td>
</tr>
</tbody>
</table>
Class/Lab Hours

8–120 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Conflict Resolution
- Customer Service
- Marketing & Sales Skills
- Project Management
- Team Building
- Change Management
- Process/Quality Improvement

**COMMERCIAL SKILLS**
- Employee Benefits Regulations (COBRA, ERISA, ACA, HIPAA)
- Product Knowledge (HMO and PPO plans, dental, vision, life, disability, long term care)
- ACA Reporting Section 6056
- Employee Understanding of the Onboarding Process for Customers
- Asset Tracking
- Request for Proposal (RFP) Management
- Website Security Procedures

**COMPUTER SKILLS**
- Adobe
- Agency Management Systems (Salesforce)
- Employee Navigator
- Insurance Carrier Website Enrollments (Aetna, Anthem, HealthNet, Kaiser, Principal, etc.)
- Microsoft Office
- Agency Bloc (commission tracking)
- GoToMeeting

(Note: Reimbursement for retraining is capped at 120 total hours per-trainee, regardless of method of delivery.)
DELEGATION ORDER

Retraine - Job Creation
Training Proposal for:

Moreno Valley Collision, Inc. dba Fix Auto Moreno Valley

Small Business
ET17-0412

Approval Date: January 11, 2017

ETP Regional Office: San Diego Analyst: M. Ray

CONTRACTOR

• Type of Industry:
  Services
  Automotive

• Priority Industry: [ ] Yes [x] No

• Number of Full-Time Employees
  California: 24
  Worldwide: 24
  Number to be trained: 28

• Owner: [x] Yes [ ] No

• Out-of-State Competition: No OSC
• Special Employment Training (SET): [x] Yes [ ] No
• High Unemployment Area (HUA): [x] Yes [ ] No
• Turnover Rate: 9%
• Repeat Contractor: [x] Yes [ ] No

FUNDING

• Requested Amount: $33,264
• In-Kind Contribution: $17,166
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100 SET HUA</td>
<td>Business Skills, Comm’l Skills, Computer Skills, Cont. Imp., HazMat., PL-Comm’l Skills</td>
<td>21</td>
<td>8 - 120 0</td>
<td>$1,144</td>
<td>*$13.00</td>
</tr>
<tr>
<td>2</td>
<td>Retraine SB&lt;100 SET HUA Job Creation</td>
<td>Business Skills, Comm’l Skills, Computer Skills, Cont. Imp., HazMat., PL-Comm’l Skills</td>
<td>7</td>
<td>8 - 120 0</td>
<td>$1,320</td>
<td>*$13.00</td>
</tr>
</tbody>
</table>

*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: $22 SB Non-Priority

- County(ies): Riverside

- Occupations to be Trained: Administrative Support, Estimator, Technician, Detailer, Production/Parts, Manager, Owner

- Union Representation:  
  - □ Yes
  - ☒ No

- Health Benefits: N/A

**SUBCONTRACTORS**

- Development Services: Synergy Management Consultants in Grass Valley assisted with development for a flat fee of $1,400.

- Administrative Services: Synergy Management Consultants will also provide administration services for a fee not to exceed 13% of payment earned.

- Training Vendors: To Be Determined

**OVERVIEW**

Moreno Valley Collision, Inc. dba Fix Auto Moreno Valley (Fix Auto Moreno Valley) ([www.fixautomorenvalley.com](http://www.fixautomorenvalley.com)) was originally formed in 2005. Located in Moreno Valley, this small business joined the Fix Auto Group as an independently-owned franchise in 2012. The Company specializes in automotive collision and repair services, and parts and accessories sales.
This will be Fix Auto Moreno Valley’s second ETP Agreement in the last five years. In its previous contract, the Company was able to provide training to existing and newly-hired trainees. Training focused on the Company’s strategic plan to increase revenues, raise worker efficiency levels, and provide a higher level of customer satisfaction. Training in this Agreement will update worker product knowledge and technical skills, and implement standard operating procedures and process improvements.

According to the Company, the automotive collision repair industry continues to evolve. Manufacturing materials, drive systems, and methodologies must meet Corporate Average Fuel Economy standards to reduce energy consumption. These industry-specific regulations require the auto industry to manufacture vehicles using materials such as boron and ultra-high strength steels and composites to increase fuel economy in the US.

In addition, Fix Auto Moreno Valley has seen an increase in aluminum vehicles being used by Ford, Honda, Toyota, General Motors (trucks), Chevrolet (Corvette) and Tesla. These industry changes will continue to impact the process of how to assess cost and bid for repair jobs. Fix Auto Moreno Valley must upgrade existing business processes as well as provide new cost, estimating, tooling and repair processes.

To keep pace with industry changes and meet customer demands, Fix Auto Moreno Valley has already implemented the following business and process improvement initiatives:

- In August 2016, Fix Auto Moreno Valley acquired and expanded its current facility by an additional 7,000 square-feet of production space; and
- Throughout 2016, the Company also acquired approximately $45,000 of new machineries including inverter resistance spot welders, MIG brazing equipment, aluminum welders, and aluminum body repair equipment.

In this proposal, ETP funding will assist the Company to provide an extensive training program that focuses on education of repair and welding methods using high and ultra-high strength steel, boron, composite, and aluminum materials, and provide training in new and upgraded equipment. Funding will also allow the Company to provide workers with skills to manage various proprietary software programs used by insurance company customers. Training will enable employees to navigate the various system components used for logistics, scheduling, estimating, billing, and the cost/repair process tailored to each customer’s needs.

Retrainees - Job Creation

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

To support the aforementioned expansion within the Company’s existing facility, it has committed to hire an additional seven new workers (Job Number 2). The date-of-hire for these trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

The curriculum will enhance the training established in the previous ETP Agreement. In this proposal, some curriculum topics are repeated from the prior agreement; however, the subject matter has been updated and/or improved; thus, no duplication of training in those courses.
ETP training will begin upon approval. Class/lab and Productive Lab training will be delivered by in-house trainers or by training vendors acquired during the training period of the proposed contract in the following:

**Business Skills** – Training will be provided to Administrative Support, Estimator, Manager and Owner. Training topics include Customer Care Skills, Advanced Sales and Marketing Skills, Conflict Resolution, and Communication Skills. Training will provide workers with skills to successfully support a culture of exemplary customer service to attract new and retain clients.

**Commercial Skills** – Training will be provided to all occupations. Extensive training in I-CAR Collision Repair, Refinishing Skills, Structural Repair, Non-Structural Vehicle Repair, Estimating Skills, Alternative Fuel & Hybrid Vehicle Repair, Service and Scheduling Procedures, Product Knowledge, and Original Equipment Manufacturer Knowledge will allow trainees to accurately estimate damage and create repair plans. New training to gain certification in repairing aluminum vehicles being used by Ford, Honda, Toyota and Tesla will also be provided to Production/Parts, Detailers and Technicians.

**Computer Skills** – Training will be provided to all occupations. Course topics include applications skills training in CCCOneSoftware, Michell Repair Center Software, Parts Procurement, and Alldata Software to gain the skills to improve production flow, scheduling, and connecting with customers and insurance carriers.

**Continuous Improvement** – Training will be delivered to all occupations. Training will focus on process/quality improvement, problem solving/decision-making skills, and standard operating procedures to improve operations and business processes.

**Hazardous Materials** – Training will be offered to Technicians, Detailers and Production/Parts on the safe handling and disposal of hazardous materials. Course topics include Volatile Organic Compound Tracking, Emergency Clean-Up, and Registration, Evaluation, Authorization and Restriction of Chemical Substances.

**Productive Laboratory – Commercial Skills**

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.

Fix Auto Moreno Valley requests up to 12 hours of PL training for approximately 9 Technicians and Estimators. Technicians who enter the industry lack substantial hands-on training and skills necessary to perform their job functions. The Company found that when these employees enter the workforce, they must be trained in a one-on-one environment by a journey-level technician. In addition, Estimators will require specific skills in insurer processes where coursework is non-standard and training must be customized by the Company.


The PL trainer will be subject-matter experts who will instruct and deliver the course content and material. The trainer will be responsible for educating, demonstrating, and instructing procedures, as well as answering questions and documenting training. Trainer will also explain process, tools, and expectation to ensure trainee’s proficiency.
The trainer-to-trainee ratio will be 1:1. The Company anticipates 30% less production time due to the trainer’s inability to perform tasks during training. Further, tasks being performed by trainees will also be impacted due to slower completion time.

**SET/HUA**

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

- **Wage Modification**

All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. The Company’s location in Riverside County (Moreno Valley) qualify for HUA status under these standards. These trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. Fix Auto Moreno Valley requests a wage modification from $29.38 to $13.00. The Company will increase the incumbent worker and Job Creation wage between 8 and 46% from the start of training to the end of retention.

**Increase in Range of Hours**

In its previous project, Fix Auto Moreno Valley requested an increase in the maximum hours from 60 to 120 for incumbent and Job Creation trainees to capture the most critical training needed for its workforce.

Although the standard range of hours for Small Business is 8-60 hours, in this proposal, Fix Auto Moreno Valley is once again requesting to increase the maximum hours. A major training focus for the Company is designed around the aforementioned strategic plan.

In addition, the Company participates in Direct Repair Programs (DRPs) as a preferred provider with Geico, Allstate, E-surance, AAA, and USAA. Participating in a DRP provides a streamlined and more efficient process for the Company, insurance carrier and the customer. Each insurance carrier has specific repair guidelines. For example, Estimators and Technicians must have the product knowledge and technical skills to complete estimates and repairs per each carrier’s specific criteria to maintain DRP status. The majority of the insurance carriers also require yearly technical skills upgrade training and recertification of Technicians, Estimators, and Administrative Support Staff. Although training varies by carrier, most insurers require Technicians and Estimators to complete a minimum 40 hours of industry-specific training each year on the latest repair technology.

The increase in hours will allow the Company to continue to provide its employees with a comprehensive training package.

**RECOMMENDATION**

Staff recommends approval of this proposal.
PRIOR PROJECTS

The following table summarizes performance by Fix Auto Moreno Valley under an ETP Agreement that was completed within the last five years:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $ %</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0380</td>
<td>Moreno Valley</td>
<td>1/12/15 – 1/11/17</td>
<td>$40,656</td>
<td>$38,427 (95%)*</td>
</tr>
</tbody>
</table>

The last day of ETP training was 5/31/16. Fix Auto Moreno Valley documented a total of 1,821 eligible training hours to equal 95% of the Agreement amount ($38,427) for 29 trainees who completed retention. The final invoice closeout was submitted on 10/17/16 and was processed and approved by ETP on 12/21/16.
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 120 Trainees may receive any of the following:

BUSINESS SKILLS
- Customer Care Skills
  - Customer Engagement
  - Customer Relationship Building
- Advanced Sales & Marketing Skills
  - Prospecting & Closing
  - Sales Account Management
  - Advanced Closing Techniques
- Conflict Resolution
- Communication Skills

COMMERCIAL SKILLS
- I-CAR Collision Repair Certification Skills
- Refinishing Skills
  - Trim & Hardware
  - Surface Preparation
  - Vehicle Priming/Sealing
  - Paint Spray Guns Maintenance & Set-Up
  - Corrosion Protection Process
  - Sand, Buff & Detail
  - Color Theory & Tints
  - Blending Techniques
  - New Technologies
- Structural Repair
  - Unibody Alignment
  - Three Dimensional Measuring
  - Repair & Replacement of Outer Body Panels
  - High Strength Steels
  - Aluminum Repair Processes
  - TIG Welding Skills
  - Straightening Structural Damage
  - Pillars, Rocker Panels, Rails, Front Structures & Floor Pan Replacement
  - Heating Cooling and AC Systems
  - Steering & Suspension Systems
  - Advanced Vehicle Systems
- Non-Structural Vehicle Repair Skills
  - Adhesive Bonding
  - Aluminum Cosmetic Damage
  - Spot Welding
- Estimating Skills
  - Steering & Suspension System Damage Analysis
  - Damage on Non-Drivable Vehicles
  - Electrical/Mechanical Systems
  - Stationary Glass
- Advanced Materials
- Advanced Vehicle Systems
- Vehicle Operation, Maintenance & Troubleshooting
- Alternative Fuel & Hybrid Vehicle Repair Diagnostics
- Service Procedures & Scheduling
- Product Knowledge
- Original Equipment Manufacturer Knowledge/Skills
- Tesla Training
- Honda Training
- Ford Aluminum
- Toyota OE training

**COMPUTER SKILLS**
- CCCOneSoftware
  - Production Flow
  - Production Planning - ETA Times & Dates
  - Internal & External Customer Communication
- Michell & Michell Repair Center Software
- Geico Mitchell Protocol
- Parts Procurement
- ADP - Tesla
- Alldata Software
- Microsoft Office Suite

**CONTINUOUS IMPROVEMENT**
- Process/Quality Improvement
- Problem Solving/Decision Making Skills
- Standard Operating Procedures

**HAZARDOUS MATERIALS**
- Completing Material Safety Data Sheets
- Volatile Organic Compound Tracking
- Emergency Clean-Up
- Registration, Evaluation, Authorization, & Restriction of Chemical Substances

**Productive Lab**

0 – 12

**COMMERCIAL SKILLS (ratio 1:1)**
- Body Filler Methods
- Structural Resistance Spot Welding
- MIG Brazing Techniques
- Color Tinting
- Spraying/Blending Techniques
- Measuring Vehicle Structures
- Alignment Process for Unitized Vehicles
- Alignment Process for Full Frame Vehicles
- Aluminum Repair
- Technical Estimating Skills
- Estimatics Direct Repair Program Skills
- Estimating System Software Skills

Note: Reimbursement for retraining is capped at 120 total hours, per-trainee, regardless of method of delivery. PL is capped at 12 hours per-trainee.
DELEGATION ORDER

Training Proposal for:

Mr. C Manager, LLC

Agreement Number: ET17-0372

Approval Date: December 15, 2016

ETP Regional Office: North Hollywood

Analyst: M. Reeves

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Industry Sector(s):</th>
<th>Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Hospitality</td>
<td></td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>☐ Yes</td>
<td>☑ No</td>
<td></td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Los Angeles</td>
<td>Repeat Contractor:</td>
<td>☑ Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>☐ No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>☐ Yes</td>
<td>☑ No</td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 221</td>
<td>U.S.: 228</td>
<td>Worldwide: 228</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>☑ 9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(% of total trainees)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$88,320</td>
<td>$0</td>
<td>$0</td>
<td>$88,320</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required | $122,880
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine</td>
<td>Comm'l Skills, Computer Skills, Cont. Imp.</td>
<td>128</td>
<td>8-200</td>
<td>0</td>
<td>46</td>
</tr>
</tbody>
</table>

*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: $16.48 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 $2.88 per hour may be used to meet the Post-Retention Wage.

---

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Housekeeping Staff</td>
<td></td>
<td>39</td>
</tr>
<tr>
<td>Customer Service Staff</td>
<td></td>
<td>28</td>
</tr>
<tr>
<td>Support/Office Staff</td>
<td></td>
<td>22</td>
</tr>
<tr>
<td>Food Service Staff</td>
<td></td>
<td>27</td>
</tr>
<tr>
<td>Manager/Supervisor</td>
<td></td>
<td>12</td>
</tr>
</tbody>
</table>

---

INTRODUCTION

Founded in 2011, Mr. C Manager, LLC (Mr. C) ([www.mrchotels.com](http://www.mrchotels.com)) is a luxury hotel located in Los Angeles. The Hotel is a 137-room property that caters to out-of-state and international upscale travelers. Mr. C is eligible for standard retraining under the out-of-state competition provisions as a convention conference hotel competing for national and international business.

This will be Mr. C’s second ETP Agreement. The proposed project reflects a continuation of the Hotel’s evolution, with marked adjustments in training due to changing demographics. As a result, several Curriculum topics have been added, changed and/or improved to address current needs, so there will be no duplication of training.

Mr. C reports a significant change taking place within the hotel industry due to the rise of Millennials and their heavy reliance on Smart technology and mobile devices. The Hotel is finding that this burgeoning group of travelers requires ultra-personal service connected to smartphone use. These travelers seek a combination of seamless technology and very rapid
response from hotel staff at all levels of the operation. Consequently, Mr. C must retrain its staff to this new way of servicing guests.

In addition, Mr. C is exploring ways to attract more international guests by improving its global services and responsiveness to varied cultural tastes. The Hotel indicates that the growth of Online Travel Agencies (OTAs) such as Hotels.com and Orbitz.com has increased the importance for Mr. C staff to work closely with these internet entities to gather valuable guest data and insight. Guests feedback posted on OTA websites provides vital information for generating repeat customers. Hotel staff must learn the most effective ways to use this data to seek new customers and stay informed of changes in travel patterns and expectations.

**PROJECT DETAILS**

**Training Plan**

The proposed training will be provided at the Hotel’s Los Angeles location. Training will be delivered by in-house subject matter experts, and by Kirkpatrick Enterprises International.

**Commercial Skills** (70%) – Training will be offered to all occupations. Staff’s ability to meet the shifting demand of millennial guests and international clients is critical to Mr. C’s success and brand awareness. This training will focus on the integration of new hospitality services, shifting culinary requirements, advanced communication, OTA research and technology integration.

**Computer Skills** (15%) – Training will be offered to all occupations. Trainees will develop skills to navigate multiple software applications in an integrated business environment. Key training modules will include OTA information and customer profile data, reservation systems and web-based applications.

**Continuous Improvement** (15%) – Training will be offered to all occupations. This training will focus on problem solving techniques, service quality, team building and leadership development. These modules will help the Hotel improve customer service levels through revamped processes and procedures.

**Commitment to Training**

Mr. C spends approximately $120,000 annually on training. The Hotel currently provides new hire orientation, mandated training, and some on-the-job training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

- **Training Infrastructure**

  An internal project coordinator will oversee class scheduling and training documentation. In addition, the Hotel has retained an outside administrative consultant to ensure that all training records adhere to ETP requirements.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes performance by Mr. C under an ETP Agreement that was completed within the last five years:
<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0272</td>
<td>Los Angeles</td>
<td>09/08/14 – 09/07/16</td>
<td>$91,080</td>
<td>*TBD</td>
</tr>
</tbody>
</table>

*Based on ETP Systems, 5,898 reimbursable hours have been tracked for potential earnings of $88,470 (97% of approved amount).

**DEVELOPMENT SERVICES**

Kirkpatrick Enterprises International (KEI) in Valencia assisted with development of this proposal at no charge.

**ADMINISTRATIVE SERVICES**

KEI will perform administrative services for a fee not to exceed 10% of payment earned.

**TRAINING VENDORS**

KEI will also provide Continuous Improvement and Commercial Skills training for an amount to be determined.
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 200

Trainees may receive any of the following:

COMMERCIAL SKILLS
- International Cultures and Requirements
- Integration of Services with Advanced Technology
- Millennials and the Changing Demographics
- Caring for the Baby-Boomer Guest
- Technology Response and Smartphone Usage
- Hospitality and Advanced Communication
- Upselling with Customer Focus
- Shifting Culinary Requirements for the International Guest
- Menu Presentation and New Dietary Demands and Restrictions
- Working with Online Travel Agencies (OTAs) and Getting the Right Feedback

COMPUTER SKILLS
- Seamless Reservation System and OTA Tie-ins
- Point of Sale Applications and Technology
- Internet and Smart Technology

CONTINUOUS IMPROVEMENT
- Standard Work Procedures
- Client Service as a Team
- Frontline Leadership
- Problem Identification and Resolution
- Process Skills

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

Small Business

ET17-0389

Approval Date: December 20, 2016

ETP Regional Office: San Diego

Analyst: K. Campion

CONTRACTOR

- Type of Industry: Services
  Landscaping

- Priority Industry: ☐ Yes ☒ No

- Number of Full-Time Employees
  - California: 84
  - Worldwide: 84
  Number to be trained: 63

- Owner: ☒ Yes ☐ No

- Out-of-State Competition: Competitors Outside CA

- Special Employment Training (SET): ☐ Yes ☒ No

- High Unemployment Area (HUA): ☐ Yes ☒ No

- Turnover Rate: 13%

- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $47,124
- In-Kind Contribution: $27,156
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SB &lt;100</td>
<td>Comm'l Skills, Cont. Imp., Computer Skills</td>
<td>63</td>
<td>8-60</td>
<td>0</td>
<td>$748</td>
</tr>
</tbody>
</table>

*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:** $22 SB Non-Priority
- **County(ies):** Orange
- **Occupations to be Trained:** Admin Staff, Crew Member, Crew Leader, Foreman, Project Manager, Supervisor/Manager, Owner
- **Union Representation:** ☐ Yes  ☑ No
- **Health Benefits:** $3.50 per hour

**SUBCONTRACTORS**

- **Development Services:** Training Refund Group (TRG) in Anaheim assisted with development for a flat fee of $2,000.
- **Administrative Services:** TRG will also provide project administrative services for an amount not to exceed 13% of payment earned.
- **Training Vendors:** To Be Determined

**OVERVIEW**

Founded in 1995 and located in Lake Forest, Natures Image, Inc. (Natures Image) ([www.naturesimage.net](http://www.naturesimage.net)) is a full-service native habitat restoration/mitigation company serving both private and public clients throughout California. The Company believes that habitat restoration is crucial to the preservation of both native plant species and wildlife.

Natures Image creates self-sustaining habitats for threatened and endangered wildlife through the elimination of invasive species and the revegetation and propagation of native species. The Company restores and maintains hundreds of habitat communities, across thousands of acres. The habitats include riparian, coastal, freshwater and saltwater marsh, desert, chaparral, oak woodlands and native grasslands.
Need for Training

This will be Natures Image’s second ETP Agreement in five years. The prior agreement centered on critical issues such as impact analysis, habitat restoration, plant/animal identification, project management skills and mobile software technology skills. Since then, Natures Image has expanded into new areas of California, and has taken on more diverse and technically challenging habitat restoration projects, such as Environmental Planning.

The Company expects to increase its market share 7% in 2017. This requires the entire workforce to be more flexible and adaptable, and ensure projects run smoothly to meet customer expectations. New and more advanced training is required to meet client and industry demands more efficiently to remain competitive.

The need for training is also being driven by new computer software updates for the Company’s SAGE software system. These updates will begin early 2017 and improve document control, schedules, receivables and human resource management. Workers must be trained to navigate and utilize these new updates.

Some of the proposed Curriculum topics are similar to training under the prior Agreement. These topics are for newly hired employees or trainees who have not participated previously. Additionally, some of the Commercials Skills courses for returning trainees have been updated with new/different content. There will be no duplication of training.

Training Plan

Training will be conducted via class/lab by in-house instructors. Vendors may be utilized during the term of the Agreement, but have yet to be identified.

**Commercial Skills:** Training will be provided to Crew Members and Leaders, Foremen, and Project Managers improve job performance and meet customer demands. This training is vital to upgrade frontline worker job skills. Staff will receive training in all areas of habitat maintenance and restoration.

**Computer Skills:** Training will be provided to all occupations to navigate new updates to the Company’s Sage software system. Trainees will learn to effectively track their work, learn better analytical tools to manage business, and learn new design tools to help provide better products to customers. Some trainees will also learn CAD skills and GPS techniques.

**Continuous Improvement:** Training will be provided to Administrative Staff, Foremen, Project Managers and Supervisors-Managers to increase business acumen, job performance and provide superior client services. Training topics include Leadership Skills Quality Control Measures, Marketing Skills, Team Building, Communication Skills and Business Strategies.

Request for 2-year Contract term

Small business proposals are usually limited to a one-year term. Natures Image requests a 2-year term because, as a small business, trainees will train in small groups; therefore, the training is projected to rollout beyond the standard nine-month training period. A 2-year term will allow time to schedule and deliver all training.

**RECOMMENDATION**

Staff recommends approval of this proposal.
The following table summarizes performance by Natures Image under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees Enrolled</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0365</td>
<td>$46,090</td>
<td>1/13/15 – 1/12/17</td>
<td>118</td>
<td>88</td>
<td>88</td>
</tr>
</tbody>
</table>

All training ended on 6/27/16. The Contractor has documented in excess of 55,000 hours of training, and submitted final payments for 42 trainees, which equates to projected earnings of 81 – 100% when all invoices are processed.
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 60

Trainees may receive any of the following:

COMMERCIAL SKILLS
- Biological Assessments
- Storm Water Multiple Application & Report Tracking
- BEST Management Practices Installation & Maintenance
- Construction Storm Water Refresher
- Working in Environmental Sensitive Areas
- Environmental Planning & Cultural Awareness
- Sensitive Species Awareness
- Ground Disturbance Awareness
- Reporting Requirements
- Advanced Herbicide Control Methods
- Intermediate Erosion Control
- Advanced Plant Identification
- Mechanical Control Methods
- Wind & Dust Mitigation
- Vehicle use in Environmental Areas
- Understanding Noise Limitations
- Intermediate Engine & Fuel
- Weed Abatement Tractors
- Fecon Head Operations
- Front End Loaders/Skid Steers
- Hand & Power Tools
- Knowledge & Identification Skills
- Plant & Animal ID/Restoration Techniques

CONTINUOUS IMPROVEMENT
- Leadership & Critical Thinking Skills
- Quality Control Measures
- Time & Project Management Skills
- Business Strategies
- Team Building
- Standard Work Procedures
- Technical Editing & Writing
- Marketing Skills
- Communication Skills

COMPUTER SKILLS
- Sage - Document Control
- Sage - Scheduling & Project Management
- Sage - Service Receivables
- Computer-Aided Design Skills
- GPS Application Skills
- Microsoft Office Application Skills

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
**DELEGATION ORDER**

**RETRAINER - JOB CREATION**

**Training Proposal for:**

**Noritz America Corporation**

Agreement Number: ET17-0385

Approval Date: December 28, 2016

ETP Regional Office: San Diego

Analyst: J. Davey

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Job Creation Initiative Retraineer</th>
<th>Industry Sector(s):</th>
<th>Services Wholesale Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Orange</td>
<td>Repeat Contractor:</td>
<td>□ Yes ☒ No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>☐ Yes ☒ No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 57</td>
<td>U.S.: 76</td>
<td>Worldwide: 10,000</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>(%) of total trainees</td>
<td>15%</td>
<td></td>
</tr>
</tbody>
</table>

### FUNDING DETAIL

\[
\text{Program Costs} - \begin{array}{c}
\text{(Substantial Contribution)} \\
\text{(High Earner Reduction)}
\end{array} = \text{Total ETP Funding}
\]

- Program Costs: $47,700
- (Substantial Contribution): $0
- (High Earner Reduction): $0
- Total ETP Funding: $47,700

In-Kind Contribution: 100% of Total ETP Funding Required: $69,730
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine Business Skills, Commercial Skills, Computer Skills, Continuous Improvement</td>
<td>56</td>
<td>8-200</td>
<td>0</td>
<td>$675</td>
<td>$16.51</td>
</tr>
<tr>
<td>2</td>
<td>Retraine Job Creation Initiative Business Skills, Commercial Skills, Computer Skills, Continuous Improvement</td>
<td>9</td>
<td>8-200</td>
<td>0</td>
<td>$1,100</td>
<td>*$13.76</td>
</tr>
</tbody>
</table>

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

### Minimum Wage by County:
Job 1 - $16.51 per hour for Orange County; Job 2 - $13.76 per hour for Orange County

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

### Used to meet the Post-Retention Wage?
☑ Yes ☐ No ☐ Maybe
Up to $3.69 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 & 2.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engineering</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Finance &amp; Business Operations</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Managers &amp; Supervisors</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Sales &amp; Marketing</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Tech &amp; Service</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>Warehouse &amp; Production</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2 – Job Creation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engineering</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Sales &amp; Marketing</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Tech &amp; Service</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 2001 and headquartered in Fountain Valley, Noritz America Corporation (Noritz America) is the US subsidiary of Noritz Corporation of Japan. Noritz America sells, distributes, and services a line of tankless water heaters, primarily for the home consumer market. The Company assembles the water heaters in kits that are sold to retailers such as Ferguson Enterprises and Hirsch Pipe & Supply. The Company also services its products through online and telephone technical support. Noritz America also has an office in Atlanta, Georgia.

Noritz America is eligible for standard funding as a company that provides services to out-of-state customers.

PROJECT DETAILS

Noritz America reports that new competitors from Korea and China are selling lower-priced products and have created a highly competitive environment over the last few years. The availability of innovative and efficient technologies from these competitors is compelling Noritz America to meet customer demands for more technology-oriented products. These pressures are forcing the Company to improve productivity and efficiency. The Company renovated its building this year to add additional cubicles to prepare for expansion over the next 5 years.

Noritz America is also expanding its product lines to include boilers and water heaters with internal recirculation pumps, as well as expanding into new markets and regions. Noritz is adding larger consumer tanks and commercial grade heaters to its current 40 gallon consumer heaters. The Company is also expanding its market reach from the West coast into the Midwest and Northeast regions, where additional growth is expected.

To help meet the requirements above, Noritz America is creating and organizing a new kitting/customizing operation which will enable the Company to reduce on-site installation costs, installation time, and enable the Company to improve product quality. New water heater assemblies are complicated and require 15-20 parts per unit shipped. Training is needed to teach 10-15 assemblers how to assemble and pack orders.

Retrainee - Job Creation

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

Noritz is also increasing the number of assembly lines from one to three, and has committed to hiring 9 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.

Temporary to Permanent Hiring

Noritz America plans to train 9 workers in Job Number 2 under Panel guidelines for the Temporary-to-Permanent program. The Company will retain these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to the Company the average time for “converting” temporary workers into full-time permanent employment is 6 months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.
Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled as trainees until after they have been hired by Noritz America 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 Plan**

Training will be provided by a combination of in-house expert trainers and outside training vendors at the Company’s facility in Fountain Valley. Training is expected to increase the overall product knowledge and increase individual and organizational productivity.

**Business Skills (20%)**: This training will be offered to Engineering, Finance & Operations, Managers & Supervisors, Production & Warehouse, Sales & Marketing, and Technical & Service occupations. Sales & Marketing staff need to know all the technical details of the company’s new products in order to sell them; therefore, a substantial amount of training for Sales & Marketing staff will be delivered in Product Knowledge and Sales skills. Training will enhance the skills of all employees related to effective Customer Service skills, Communication skills, Coaching/Feedback, Planning, Product Knowledge, Time Management and related skills. Trainees with these skills will perform their jobs more effectively and efficiently.

**Commercial Skills (30%)**: This training will be offered to Engineering, Finance & Operations, Managers & Supervisors, Production & Warehouse, Sales & Marketing, and Technical & Service occupations. Trainees will receive training to develop their skills in Blueprint Reading, Equipment Operation, Good Documentation Practices, Inspection Techniques and other related skills to Noritz’s products.

**Computer Skills (30%)**: This training will be offered to Engineering, Finance & Operations, Managers & Supervisors, Production & Warehouse, Sales & Marketing, and Technical & Service occupations. Employees will learn how to use the Adobe Suite of design software, Dynamics CRM software, Microsoft (MS) Office suite, Word Press and other related software. Much of the training for Production and Warehouse trainees will focus on how to receive and inventory parts, then pull parts from inventory using an ERP system. Trainees also need to know the process for creating and reading a bill of materials for each heater assembly kit.

**Continuous Improvement (20%)**: This training will be offered to Engineering, Finance & Operations, Managers & Supervisors, Production & Warehouse, Sales & Marketing, and Technical & Service occupations. Trainees will learn how to work in Teams, Solve Problems, Eliminate Waste, learn Lean Process Improvement and other related skills. Trainees will be able to reduce operating costs, eliminate waste, improve customer satisfaction and other related skills.

**Commitment to Training**

Noritz America spends approximately $100,000 on training in California annually. The Company has provided its employees training in Customer Service, Strategic Planning, and Management/Supervisory skills among others. Training was job-specific and most often elective, except for new hire training. Noritz will continue offering training in these and other hard and soft skills as necessary after the completion of ETP-funded 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

Noritz America will have a dedicated Training Lead who will meet with Managers to determine when to schedule training for each department. The Training Lead will help plan, schedule and review training needs with each department to ensure that training is conducted. The Company will also have the assistance of Training Funding Source to administer the project.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Noritz America retained Training Funding Source in Seal Beach to assist with development of this proposal for a flat fee of $3,900.

ADMINISTRATIVE SERVICES

Training Funding Source 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
Class/Lab Hours

Trainees may receive any of the following:

8 - 200

**BUSINESS SKILLS**
- Accounting - Understanding P & L's
- Budgeting & Financial Management
- Business Development
- Coaching/Feedback
- Communication Skills
- Customer Service/Client Relations
- Employee Engagement
- Interview Skills
- Leadership and Management
- Marketing
- Negotiation
- Organizational and Time Management
- Performance Management
- Planning
- Product Knowledge
- Project/Program Management
- Sales and Marketing
- Strategy Deployment Process (X-Matrix)
- Time Management
- Work processes/procedures

**COMMERCIAL SKILLS**
- Blueprint Reading
- Daily Status Package/Operational Strategy Execution
- Equipment Operations & Maintenance, Troubleshooting
- Good Documentation Practices (GDP)
- Inspection techniques
- Quality Control
- UL Certification

**COMPUTER SKILLS**
- Adobe Creative Suite -- InDesign, Photoshop, Illustrator
- Dynamics CRM software
- Human Capital Management Software
- Dynamics AX ERP software
- eCommerce
- Lean Six Sigma
- Microsoft Office/Project/Sharepoint
- Payroll/Human Resources
- Word Press
- WebEx
CONTINUOUS IMPROVEMENT

- Cost Reduction
- Eliminating Waste, Goal Setting, Improving Workflow
- ISO 9000
- Lean Process Improvement/Kaizen
- Problem Solving, Process and Quality Improvement
- Root Cause Analysis
- Six Sigma Process Controls
- Statistical Process Control - SPC
- Team Building

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of method of delivery.
Panel Amendment #2 for:
Organic by Nature, Inc.
Agreement Number: ET16-0200

Amendment Effective Date: October 14, 2016
Approval Date: December 7, 2016

ETP Regional Office: North Hollywood    Analyst: M. Webb

CURRENT PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Type:</th>
<th>Retraine</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
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</thead>
<tbody>
<tr>
<td>Priority/SB&lt;100</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Los Angeles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Union(s):</td>
<td>Yes   No</td>
</tr>
<tr>
<td>Repeat Contractor:</td>
<td>Yes   No</td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>Yes   No</td>
</tr>
<tr>
<td>Current Contract Term:</td>
<td>September 25, 2015 to September 24, 2017</td>
</tr>
<tr>
<td>Substantial Contribution:</td>
<td>Yes   No</td>
</tr>
</tbody>
</table>

CURRENT FUNDING

| Current Funding | $49,764 |

AMENDMENT FUNDING

<table>
<thead>
<tr>
<th>Requested Funding</th>
<th>Total Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$+25,194</td>
<td>$74,958</td>
</tr>
</tbody>
</table>
Organic By Nature, Inc. ET16-0200

AMENDMENT TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Priority SB&lt;100</td>
<td>Business Skills, Computer Skills, Cont. Impr., HazMat, Mfg. Skills</td>
<td>93</td>
<td>8-150</td>
<td>0</td>
<td>$806</td>
</tr>
</tbody>
</table>

It will be made a condition of contract that the trainees in this Job Number will never be paid less than the statewide minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table.

Minimum Wage by County: Job Number 1 (HUA): $11.98 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 ☐

Up to $1.70 per hour may be used to meet the Post-Retention Wage.

<table>
<thead>
<tr>
<th>Occupation Title</th>
<th>Wage Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Staff</td>
<td></td>
</tr>
<tr>
<td>Sales Staff</td>
<td></td>
</tr>
<tr>
<td>Production Staff</td>
<td></td>
</tr>
<tr>
<td>Technical/Quality Staff</td>
<td></td>
</tr>
<tr>
<td>Supervisors/Managers</td>
<td></td>
</tr>
<tr>
<td>Owner</td>
<td></td>
</tr>
</tbody>
</table>

*Trainees must be earning at least $10.50 by January 1, 2017

INTRODUCTION

Organic by Nature, Inc. (OBN) is a contract manufacturing service provider located in Long Beach. Organic and kosher certified, the Company follows strict protocols to manufacture dietary supplements using organic ingredients. Contract manufacturing services include formulation, blending, powder-filling and bottling/packaging. OBN’s employee population increased 12% between 2014 and 2015. To meet demand, the Company implemented systematic processes in its manufacturing operations to increase efficiency and reduce production costs. As of 2015, demand for OBN products has continued to increase.

AMENDMENT DETAILS

OBN has delivered sufficient hours of training to earn 84% of their funding amount ($42,276). However, training for 88 workers must continue over the next few months to implement Lean skills in production processes. There are eight months left to train under this Agreement.

The Contractor requests to increase ETP funds by $25,194 as outlined below:
In Summary:

- The Agreement amount will increase by $25,194, from $49,764 to $74,958.
- The total number of trainees will increase from 87 to 93.
- The weighted average hours will increase from 22 to 31.
- The Average cost per trainee will increase from $572 to $806.
- Increase the maximum number of training hours per trainee from 100 to 150.

OBN also requests a retroactive effective date of 10/14/16, the date this request was submitted to ETP.

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARIZE PRIOR MODS/AMENDS

- Modification No.1: Increased the maximum amount of training hours in Job Number 1 from 60 to 100 and adds one year to the contract End of Term Date. This Modification was approved on 05/04/16.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by OBN under the current ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees Enrolled</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0200</td>
<td>$49,764</td>
<td>09/25/15-09/24/17</td>
<td>91</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

To date, 1,626 eligible training hours have been tracked in the ETP Online System for potential earnings of $42,276 (84% of approved amount).
Exhibit B: Menu Curriculum

Class/Lab Hours

8-150

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Customer Service
- Effective Communication
- Inventory Control
- Key Performance Indicators
- Leadership
- Market Research
- Operational Procedures
- Product Innovation
- Reconciliation
- Teambuilding

**COMPUTER SKILLS**
- Enterprise Resource Planning (ERP)
- Material Requirement Planning
- Network & Server Management
- Office Suite Software
- Production Scheduling
- Shop Floor Data Collection
- WorkCenter Routing

**CONTINUOUS IMPROVEMENT**
- Good Manufacturing Practices
- Lead Time Reduction
- Lean Manufacturing Skills
- Process Flowchart
- Process Improvement
- Root Cause Analysis
- SMART Goals
- Total Quality Management

**HAZARDOUS MATERIALS**
- HazMat Handling
- Material Safety Data Sheets

**MANUFACTURING SKILLS**
- Chemical and Microbiological Analysis
- Equipment Operations
- Hazard Analysis and Critical Control Point (HACCP)
- Laboratory Procedures
- Material Handling Equipment
- Preventive Maintenance
- Production Equipment/Tools
- Product Formulation and Development
- Sanitation
- Setup Time Reduction
- Standard Operating Procedures (SOP)
- Troubleshooting
- Validation

**Note:** Reimbursement for retraining is capped at 150 total hours per-trainee, regardless of method of delivery.
DELEGATION ORDER

Retraine - Job Creation
Training Proposal for:
Penn Air Control Inc.

Small Business
ET17-0384

Approval Date: January 4, 2017

ETP Regional Office: North Hollywood Analyst: E. Wadzinski

CONTRACTOR

- Type of Industry: Construction Services
  Priority Industry: ☑ Yes ☐ No

- Number of Full-Time Employees
  California: 81
  Worldwide: 90
  Number to be trained: 67
  Owner ☑ Yes ☐ No

- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☑ No
- High Unemployment Area (HUA): ☐ Yes ☑ No
- Turnover Rate: 18%
- Repeat Contractor: ☑ Yes ☐ No

FUNDING

- Requested Amount: $83,954
- In-Kind Contribution: $97,564
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraining SB &lt;100 Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Impr., HazMat, OSHA 10/30, PL-Comm Skills</td>
<td>57</td>
<td>8-60 0</td>
<td>$1,222</td>
<td>*$16.46</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 47</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraining Job Creation Initiative SB &lt;100 Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Impr., HazMat, OSHA 10/30, PL-Comm Skills</td>
<td>10</td>
<td>8-60 0</td>
<td>$1,430</td>
<td>*$13.72</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 55</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*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 and 2: $26 SB Priority
- Counties: Orange, San Diego
- Occupations to be Trained: Technicians, Administration, Supervisors, Managers, IT/CAD, Owner
- Union Representation: Yes Sheet Metal, Air, Rail, Transportation Workers Local Union 105
- Health Benefits: Job #1 only: Up to $1.25 per hour

## SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach assisted with development for a flat fee of $3,900.
- Administrative Services: TFS will also provide administrative services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

## OVERVIEW

Established in 1972, Penn Air Control Inc. (Penn Air) (www.pennairgroup.com) provides Heating, Ventilation, and Air Conditioning (HVAC) energy conservation to government, healthcare, industrial and commercial sectors. Energy conservation allows customers to reduce operating expenses related to HVAC systems through “balancing” (eliminating over- or under-utilization). Penn Air also improves air quality by identifying and removing sources of pollutants and reducing/eliminating emissions entering through HVAC systems.
Penn Air is headquartered in Cypress and has six satellite offices: four in the US (San Diego, San Francisco, Las Vegas, Hawaii), and one each in Guam and Puerto Rico, all servicing clients worldwide. The Cypress and San Diego facilities will be participating in ETP-funded training.

**Need for Training**

This will be Penn Air’s second ETP contract. The Company’s first Agreement focused on implementing and training employees on Sage MAS 90 (an Enterprise Resource Planning software), MS Office and Computer-Assisted Design software. Training focused on improving skills and processes including product and service quality improvement, project management, air balance, goal setting, installation and service, and job scheduling.

This proposal will focus on training employees on new equipment and air systems procedures. Penn Air recently purchased new instrumentation to improve energy conservation and indoor air quality. These instruments are highly complicated and will require training to operate and troubleshoot. Trainees also need to learn new Heating Ventilation Air Conditioning (HVAC) Component Testing and Balancing Procedures including how to prepare and review new test and balance reports with customers and reading and following HVAC System Diagrams.

Additionally, training in this proposal will standardize training at the two Southern California locations. This will allow staff to consistently provide better quality services while remaining competitive in the industry. Training will address on-going technological changes, system upgrades, and tools and equipment for faster service.

**Retraineec - 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.

Penn Air has experienced sales growth of 40-45% over the last two years. The Company continues to grow business by expanding into new markets. To keep up with business expansion, Penn Air will hire 10 new Technicians and Administration staff (Job Number 2).

Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Trainees will be hired into “net new jobs” as a condition of contract.

**Training Plan**

**Business Skills (10%)** – Training will be offered to all occupations. Training will provide skills in communication, teambuilding, and project management to help employees perform job duties more efficiently and work together. Training will result in improved customer service and sales. Trainees will learn to complete sales reports, qualify sales prospects and handle objections.

**Commercial Skills (50%)** – Training will be offered to Technicians, Supervisors and Managers. Training will provide trainees the knowledge and skills to apply industry processes including National Air Duct Cleaning Association (NADCA) Standards, Air Systems Cleaning Specialist (ASCS) Standards, Certified Ventilation Inspector (CVI) Standards, Gaylord Kitchen Exhaust Certification Standards, Instrumentation Requirements, Measurements for Test and Balance, HVAC Component Testing and Balancing Procedures. Training enable trainees to comply with industry standards.
Computer Skills (10%) – Training will be offered to all occupations to improve interdepartmental communication and help trainees learn digital project reporting requirements and methods and new system upgrades. Additionally, trainees will receive AutoCAD to provide essential drafting tools for documenting and collaborating with coworkers and clients.

Continuous Improvement (20%) – Training will be offered to all staff to keep current with industry developments and provide quality services.

Hazardous Materials (5%) – Training will be offered to Technicians on hazardous materials and problems encountered in the field and safe use of hazardous chemicals. Trainees will use a common approach to classify chemicals and communicate hazard information on safety data sheets.

Certified Safety Training

1 OSHA 10/30. This training is a series of courses “bundled” by industry sector and occupation. The course will be offered to Technicians, Supervisors and Managers and will consist of 10 hours of classroom or CBT training for 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

The Panel reimburses for training delivered in a Productive Laboratory (PL) setting in which trainees may produce goods or provide services for profit as part of the training. For PL courses identified in the Curriculum, the instructor must be dedicated to training delivery during all hours of training.

Commercial Skills PL will provide 20 Technicians practical experience in air balancing techniques, exhaust system handling, ductwork, and fluid flow equipment operation. Projects will require trainees to use filtration devices, air handling units, air scrubbers, coils, vacuums, compressors, brushes, cleaning solutions and other equipment. Trainees will be paired with in-house certified expert Technicians and will receive an average of 16 PL hours, not to exceed 24 hours. The trainer-to-trainee ratio will not exceed 1:1.

Trainers will demonstrate tasks at various stages, and trainees will perform the same task while under supervision. The trainer will be present full-time to demonstrate, monitor, and evaluate. Lower production levels are expected to correct errors and mistakes. Projects will require additional employee resources to meet required time frames. PL will focus on requirements, standards, and processes. Upon completion of the PL training, trainees will continue to receive substantial “on-the-job” training at the companies’ expense.

Temporary to Permanent Hiring

Penn Air intends to train 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 four months. 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 Penn Air 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.

**Union Support**

Penn Air’s technicians are represented by the Sheet Metal, Air, Rail, Transportation Workers Local Union 105. A letter of support has been obtained and placed in file.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0147</td>
<td>Orange, San Diego</td>
<td>07/01/2014–06/30/2016</td>
<td>$66,808</td>
<td>$66,808</td>
<td>(100%)</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab Hours
8-60
Trainees may receive any of the following:

**BUSINESS SKILLS**
- Interpersonal Skills
- Influence and Leadership
- Time Management
- Teamwork
- Sales Presentation
- Proposal Writing
- Project Management
- Negotiation Skills
- Team Building
- Overcoming Sales Objectives
- Branding
- Creative Problem Solving
- Delivering Constructive Criticism
- Leadership
- Lead Training (Transition from Tech to Lead Tech)
- Team Conflict Resolution

**COMMERCIAL SKILLS**
- National Air Duct Cleaning Association (NADCA) Standards
- Air Systems Cleaning Specialist (ASCS) Standards
- Certified Ventilation Inspector (CVI) Standards
- Gaylord Kitchen Exhaust Certification Standards
- Instrumentation Requirements
- Measurements for Test and Balance
- HVAC Component Testing and Balancing Procedures
- Agendas Requirements
- Submittals Requirements
- Scheduling Field
- Duct Cleaning Protocols
- Project Coordination
- Test and Balance Report
- System Diagrams

**COMPUTER SKILLS**
- Sage ERP MAS 100
- Photo Reports
- ADP Platform
- Dropbox
- Daily Reports
- Adobe Photo Shop
- Autodesk AutoCAD 2015

**CONTINUOUS IMPROVEMENT**
- Process Improvement
HAZARDOUS MATERIALS
- GHS – Globally Harmonized System
- Safety Data Sheet Updates
- Labels and Classifications

OSHA 10/30 (Certified OSHA Instructor)
- OSHA 10 (Requires Completion of 10-Hour Course)
- OSHA 30 (Requires Completion of 30-Hour Course)

Safety Training will be limited to 10% of total training hours per-trainee. This cap does not apply to HAZMAT or OSHA 10/30.

Productive Lab Hours
0-24

COMMERCIAL SKILLS (1:1 trainer-to-trainee ratio)
- Duct Cleaning Process (step by step process and equipment to use on different ductwork)
- Containment Set-Up Process and Requirements
- Kitchen Exhaust (preparation set-up requirements for job)
- Hood Cleaning - Standard Process
- Power Tool Use
- Use of Hood to Read the Volume of Air Cubic Feet Per Minute
- Air Foil to Read Velocity Feet Per Minute
- Basic Temperature Testing Measurements
- Drive Adjustments for Testing and Balancing
- Air-Handling Unit (AHU) Test and Balance
- Mixing Damper Leakage Testing

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. PL is capped at 24 hours per-trainee.
October 11, 2016

Employment Training Panel
1100 J Street, 4th Floor, Suite 400
Sacramento, CA 95843

Re: Union Support Letter for Penn Air Control, Inc.

Dear Sir/Madam:

Sheet Metal, Air, Rail, Transportation Workers Local Union 105 supports the Penn Air Control, Inc. Employment Training Panel Agreement. We are aware that employees of Penn Air Control, Inc. will receive training funded through the Employment Training Panel and we concur with the proposed training. If you have any questions or need any further assistance, please feel free to contact Ms. Lori Turner, my secretary, at (909) 305-2800 ext. 231.

Sincerely,

[Signature]
Luther B. Medina
Business Manager/President

LBM:lat/Penn Air Control Inc. Employment Training Panel 101116
opeiu #537
afl-cio,clc

cc: Ms. Gina Medel, Penn Air Control, Inc.
DELEGATION ORDER

Retrainee – Job Creation
Training Proposal for:
Peterson Brothers Construction, Inc.
dba PBC Companies, Inc.
Agreement Number: ET17-0338

Approval Date: December 9, 2016
ETP Regional Office: North Hollywood  Analyst: M. Paccerelli

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Industry Sector(s):</th>
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<tr>
<td></td>
<td>SET</td>
<td>Construction</td>
</tr>
<tr>
<td>Priority Rate</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Orange</th>
<th>Repeat Contractor:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>☑ Yes  ☐ No</td>
</tr>
</tbody>
</table>

Union(s): ☐ Yes  ☑ No

Number of Employees in:

Turnover Rate: 2%

Managers/Supervisors:
(% of total trainees) 0%

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>= Total ETP Funding</th>
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</thead>
<tbody>
<tr>
<td>$89,940</td>
<td>$0</td>
<td>$0</td>
<td>$89,940</td>
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</table>

In-Kind Contribution: 100% of Total ETP Funding Required $123,232
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Impr., HazMat, OSHA 10/30, PL-Comm Skills</td>
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<td>8-200</td>
<td>Weighted Avg: 43</td>
<td></td>
</tr>
<tr>
<td>1</td>
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<td></td>
<td>0-24</td>
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<td>$774</td>
</tr>
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<td>SET Priority Rate</td>
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</tr>
<tr>
<td>2</td>
<td>Retrainee</td>
<td></td>
<td></td>
<td>0-24</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Job Creation SET Priority Rate</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:**  Job Number 1: $21.28 per hour SET Priority Statewide Average Hourly Wage; Job Number 2: $13.76 per hour for Orange County

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

**Used to meet the Post-Retention Wage?** Yes ☑ No ☐ Maybe

Up to $3.93 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Up to $1.24 per hour may be used to meet the Post-Retention Wage in Job Number 2.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Installer</td>
<td>65</td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Working Foreman</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Field Installer</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

## INTRODUCTION

PROJECT DETAILS

This will be PBC’s second ETP Agreement and the second within the last five years. The prior Agreement focused on the integration and streamlining of contract procedures. Some courses from the Curriculum of the prior Agreement may be similar to the current Curriculum; however, for most of the trainees, the courses have been updated. Only newly hired trainees will receive duplicate courses.

For this new proposal, training will focus on upgrading skills of Field Installers, Administrative Staff, and Working Foremen consistent with changes in the construction industry. Administrative Staff will receive upgraded skills pertaining to contracts. Field Installers and Working Foremen will receive equipment training.

Additionally, technology has become an integral part of construction. When used correctly, technology can speed up access to information, improve profit margins, increase market share, reduce operating expenses, reduce rework, and increase on-time delivery. PBC has invested in new software and systems, such as Project Schedule, Timberline, Time Tracking (AboutTime), On Center Software, HRMS, Crystal Reports, and Concrete Order System, to improve its processes. The Company is also transitioning from paper processes to electronic form. Contracts, proposals, blueprints, and change orders will be available electronically so employees can access them at any time.

Retrainee - Job Creation

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

PBC recently obtained several new construction projects, necessitating the hiring of new employees. As a result, PBC has committed to hiring and training five new Field Installers and Administrative Staff to work on these new projects. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Training will be provided by in-house subject-matter experts and vendors to be determined at a later date.

Commercial Skills (40%) - This training will be offered to Field Installers and Working Foremen. Trainees will learn to operate tools & equipment like scaffolding, forms, petti bone, etc.

Business Skills (10%) – Training will be offered to all occupations and will include job cost budgeting, construction finance and procedures, and customer satisfaction.

Computer Skills (20%) – Training will be offered to all occupations in software and the automation of company processes.

Continuous Improvement (20%) – Training will be offered to all occupations which will include topics in process improvement, quality systems and procedures, and team building.

Hazardous Materials (5%) - Training will be offered to Field Installers and Working Foremen on safe handling of hazardous materials.
Certified Safety Training

**OSHA 10/30 (5%)** – This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of training for Field Installers; and 30 hours for Working Foremen. The coursework must be approved by, and the instructors must be certified by Cal-OSHA. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour or 30-hour course. OSHA 10/30 is not included in the 10% limitation on safety training.

Computer-Based Training (CBT)

Training will serve as an introduction/prerequisite to Class/Lab training in Computer, Commercial and Business Skills.

Productive Laboratory – Commercial Skills

Trainees may produce goods or provide service for profit as part of Productive Lab (PL) training in the courses identified under the Curriculum. PL training will be offered to Field Installers in Commercial Skills courses such as Trenching, Excavation, Concrete and Masonry, Petti Bone, Ramset, and Power Tool Use and Guarding. Trainers will be in-house subject matter experts who are exclusively dedicated to instruction for the entire reported training time.

PL will complement Class/Lab training. Trainees will attend classroom training. Then, trainees will learn by observing, shadowing, and completing supervised work assignments. Up to 32 hours of PL will be delivered at a trainer-to-trainee ratio of 1:1. Trainees are evaluated on knowledge, skill, and proficiency. Trainers must certify competency for each skill before trainees are allowed to work independently. Upon completion of PL, trainees will continue to receive “on-the-job” training at the employer’s expense.

Special Employment Training

- **Wage Modification**

  Under Special Employment Training (SET), the Company is not required to show out-of-state competition. To qualify under SET, trainees must earn at least the statewide average hourly wage of $28.37 at the end of the retention period. However, trainees employed in a priority industry may qualify for a SET wage modification up to 25% below the statewide average hourly wage to $21.28 per hour. PBC requests the wage modification for trainees in Job Number 1.

Frontline Worker

PBC will include 25 Working Foremen, which represents 22% of the trainee population in this training proposal. These employees supervise and are non-exempt frontline workers. They spend more than 50% of their time performing frontline work duties. Trainees meet the Panel’s definition of frontline workers, qualifying for SET funding.

**RECOMMENDATION**

Staff recommends approval of this proposal.
**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0238</td>
<td>Brea</td>
<td>07/28/2014–07/27/2016</td>
<td>$100,000</td>
<td>$100,000 (100%)</td>
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</tbody>
</table>

**DEVELOPMENT SERVICES**

PBC retained Training Funding Source in Seal Beach to assist with development of this proposal for a flat fee of $3,900.

**ADMINISTRATIVE SERVICES**

PBC also retained TFS to perform administrative services in connection with this proposal for a fee not to exceed 13% of the 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**
- Change Management
- Budget
- Coaching Skills
- Collaboration
- Communication
- Conflict Management
- Construction Finance
- Construction Procedures and
- Customer Application for Payment
- Customer Satisfaction
- Developing New Opportunities
- Leadership
- Planning
- Performance Management
- Product Knowledge
- Risk Management

**COMMERCIAL SKILLS**
- Competent Person, Trenching
- Competent Person, Excavation
- Concrete and Masonry
- Equipment Operations
- Field Operational Procedures
- Installation Procedures
- Job Cost
- Materials Handling and Storage
- Petti Bone
- Power Tool Use and Guarding
- Ramset
- Scaffold Erection Guidelines
- Scaffold Awareness
- Signs, Signals and Barricades
- Site Logistics
- Storm Water Pollution Prevention Program
- Trenching and Excavation Awareness
- Underground Utility
- Walk Through Procedures
- Workzone Traffic Control

**COMPUTER SKILLS**
- HRMS
- Crystal Reports
- Microsoft Office 365
- Omni-Form
- On Center
- Prelien 2 Lien
CONTINUOUS IMPROVEMENT
- Process Improvement
- Productivity improvement
- Quality Systems and Procedures
- Team Building/ Problem Solving/ Decision-Making

HAZARDOUS MATERIALS
- Explosives
- Flammable Liquids
- Gases
- Hazard Communication (HazCom)
- Material Safety Data Sheet (MSDS)
- Toxic and Infectious Substances

OSHA 10/30
- OSHA 10 (requires 10 hours completion)
- OSHA 30 (requires 30 hours completion)

Safety Training will be limited to 10% of total training hours, per-trainee.

PL Hours
0 – 32

PRODUCTIVE LAB (PL) (1:1 ratio)
- Competent Person, Trenching
- Competent Person, Excavation
- Concrete and Masonry
- Equipment Operations
- Field Operational Procedures
- Installation Procedures
- Materials Handling and Storage
- Petti Bone
- Power Tool Use and Guarding
- Ramset
- Scaffold Erection Guidelines
- Scaffold Awareness
- Signs, Signals and Barricades
- Site Logistics
- Storm Water Pollution Prevention Program
- Trenching and Excavation Awareness
- Underground Utility
- Walk Through Procedures
- Workzone Traffic Control

CBT Hours
0 – 24

BUSINESS SKILLS
- Managing Subcontractors 1 (20 minutes)
- Managing Subcontractors 2 (30 minutes)
Planning (30 minutes)  
Productivity (30 minutes)  
Project Startup (45 minutes)  
Records Management (20 minutes)  
Shared Folders (30 minutes)  
Timekeeping (1 hour, 10 minutes)  
Office 365 Basic (1 hour, 27 minutes)  
Office 365 Excel Essential (8 hours, 54 minutes)  
Office 365 Word Essential (5 hours, 41 minutes)  
Office 365 PowerPoint Essential (3 hours)  
Office 365 Outlook Essential (2 hours, 53 minutes)  
Crystal Reports 2013 Essential (3 hours, 51 minutes)  
Microsoft Surface Book & other 2-in-1 Laptops (2 hours, 10 mins)

COMMERCIAL SKILLS
- Change Orders 1 (1 hour)  
- Change Orders 2 (45 minutes)  
- Change Orders 3 (45 minutes)  
- Defensive Driver Awareness (30 minutes)  
- Documentation 2 (15 minutes)  
- Excavation Safety (2 hours)  
- Excavation/Trenching (8 hours)  
- Scaffolding Competent Person (8 hours)  
- Hazardous Communication (2 hours)  
- Hand and Power Tools (1 hour)  
- Job Cost 1 (30 minutes)  
- Job Cost 2 (45 minutes)  
- Job Cost 3 (1 hour)  
- Labor Cost and Productivity 1 (30 minutes)  
- Labor Cost and Productivity 2 (45 minutes)  
- Scheduling 3 (30 minutes)

COMPUTER SKILLS
- BIM Awareness (Building Information Modeling) (30 minutes)  
- Email Archive (20 minutes)  
- Email Etiquette (30 minutes)  

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee excluding OSHA 10/30. PL is capped at 32 hours per-trainee.
Training Proposal for:

**Pleasant Mattress, Inc. dba Cannon Sleep Products**

**Agreement Number:** ET17-0363

**Approval Date:** December 9, 2016

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

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Industry Sector(s):</th>
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<tbody>
<tr>
<td>Priority Rate HUA</td>
<td></td>
<td>Manufacturing</td>
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<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Fresno</th>
<th>Repeat Contractor:</th>
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<tbody>
<tr>
<td></td>
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<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No</td>
</tr>
</tbody>
</table>

**Number of Employees in:**  
- **CA:** 125  
- **U.S.:** 126  
- **Worldwide:** 126

**Turnover Rate:** 14%

**Managers/Supervisors:** 12%

### FUNDING DETAIL

```
<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
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<tbody>
<tr>
<td>$85,554</td>
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<td>$0</td>
<td>$85,554</td>
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</table>

In-Kind Contribution: 100% of Total ETP Funding Required $97,235
```
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Literacy Skills</td>
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<td>$882</td>
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<td></td>
<td>Weighted Avg: 49</td>
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</tr>
<tr>
<td>2</td>
<td>Retrainee Priority Rate HUA</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Literacy Skills</td>
<td>46</td>
<td>8-200</td>
<td>0</td>
<td>$882</td>
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<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 49</td>
<td></td>
</tr>
</tbody>
</table>

* 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: $15.60 per hour for Fresno County
Job Number 2 (HUA): $11.70 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 $2.96 per hour may be used to meet the Post-Retention Wage for Job Number 1 and up to $1.20 per hour for Job Number 2.

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Number 1 (Retrainees)</td>
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<td>Administrative Staff</td>
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</tr>
<tr>
<td>Customer Service/Sales Staff</td>
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<td></td>
</tr>
<tr>
<td>Driver</td>
<td>11</td>
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<tr>
<td>Manager 1</td>
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<tr>
<td>Manager 2</td>
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<tr>
<td>Production Staff</td>
<td>21</td>
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</tr>
<tr>
<td>Job Number 2 (HUA/Retrainees)</td>
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<tr>
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<tr>
<td>Production Staff</td>
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</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1959 and headquartered in Fresno, Pleasant Mattress, Inc. dba Cannon Sleep Products (Pleasant Mattress)(www.cannonsleep.com) is a manufacturer of branded Cannon
Sleep Products mattresses, box springs and futons. The Company manufactures nearly 200,000 pieces per year at its 150,000 sq. ft. facility in Fresno. This is Pleasant Mattress' first ETP Agreement. Training under this proposal will be at their Fresno facility.

**PROJECT DETAILS**

Pleasant Mattress has experienced a growth in business due to an increase in new customers and internet sales. This growth requires staff possess the skills to support the increase in sales. ETP funding will assist the Company improve and document processes to be more streamlined and efficient.

Training in CAD/CAM will ensure staff possess the technical skills necessary to meet customer specification. Training in Lean manufacturing and continuous improvement will help Managers and their teams monitor operational efficiencies to identify and solve problems.

**Training Plan**

Training will be delivered via classroom/laboratory methods by In-house subject matter experts. Vendors may be utilized if needed in the following:

**Business Skills (5%)**: Training will be offered to Customer Service/Sales Staff, Drivers and Managers. Training in Quality Customer Service will enhance staff's customer service skills.

**Literacy Skills (5%)**: Training will be offered to all occupations except Managers. Training will increase staff understanding of the English language as it pertains to their specific job duties. Training will include Vocational English as a Second Language.

**Computer Skills (10%)**: Training will be offered to all occupations. Training will ensure workers can effectively utilize the Company’s ERP System and improve operational effectiveness. Training topics includes Enterprise Resource Planning, CAD/CAM Software Training and E-Commerce & E-Business.

**Manufacturing Skills (40%)**: Training will be offered to Production Staff and Managers. Training will provide cross-training opportunities and ensure staff possess the technical knowledge. Training topics include Logistics Management, Programmable Logic Controllers and Sewing.

**Continuous Improvement (40%)**: Training will be offered to all occupations. Training will ensure staff possess the skills to improve efficiencies and operations. Training topics include Improve Process Cycle Times, Lead Manufacturing, Problem Solving and Team Building.

**High Unemployment Area**

All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's location in Fresno County qualifies for HUA status under these standards. The Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Pleasant Mattress requests this wage modification for trainees in Job Number 2, from $15.60 to $11.70.

**Temporary to Permanent Hiring**

Pleasant Mattress intends to train 20 workers in Job Number 1 and 2 under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to Pleasant Mattress the average time for “converting” temporary workers into full-time permanent employment is 3 to 6 months. It is expected that these workers will
receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled as trainees until after they have been hired by Pleasant Mattress 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.

Commitment to Training

Pleasant Mattress’ annual training budget is approximately $30,000. The Company provides training in orientation, ethics and labor related topics and job specific training for new hires.

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 Company has dedicated staff to coordinate all training efforts, including scheduling training, securing rosters, providing trainee enrollment data, verifying training and retention completion, participating in ETP monitoring activities. They have also employed the services of California Technology Consulting to assist with project administration.

Impact/Outcome

Training will ensure that workers have the skills to sustain the company’s growth initiatives. With new procedures and robust systems in place, daily task will be more efficient.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

California Manufacturing Technology Consulting (CMTC) in Torrance assisted with development of this proposal. Note: CMTC is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000. In this proposal, the fee will be $8,555. This fee does not affect the approved amount of funding.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined
Class/Lab Hours

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Quality Customer Service

**COMPUTER SKILLS**
- CAD/CAM Software Training
- E-Commerce & E-Business
- Enterprise Resource Planning
- Spreadsheets (Intermediate & Advanced)
- Word Processing (Intermediate)

**CONTINUOUS IMPROVEMENT**
- Communication Skills
- Improving Process Cycle Times
- Leadership Skills
- Leading Change
- Lean Manufacturing
- Problem Solving
- Quality Management Systems
- Team Building

**MANUFACTURING SKILLS**
- Logistics Management
- Programmable Logic Controllers
- Production & Inventory Management
- Production Skills
- Quality Inspection
- Safety
- Sewing
- Quilting
- Small Batch Manufacturing
- Supply Chain Optimization
- Standard Operating Procedures

**LITERACY SKILLS**
- Vocational English as a Second Language

Literacy Training cannot exceed 45% of total training hours per-trainee
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.
DELEGATION ORDER

Retrainee - Job Creation
Training Proposal for:
Polycomp Administrative Services, Inc.

Small Business

ET17-0381

Approval Date: January 11, 2017

ETP Regional Office: Sacramento

Analyst: J. Lazarewicz

CONTRACTOR

- Type of Industry: Financial Services

Services

Priority Industry: Yes No

- Number of Full-Time Employees

California: 98

Worldwide: 98

Number to be trained: 82

Owner Yes No

- Out-of-State Competition: Competitors Outside CA

- Special Employment Training (SET): Yes No

- High Unemployment Area (HUA): Yes No

- Turnover Rate: 10%

- Repeat Contractor: Yes No

FUNDING

- Requested Amount: $49,698

- In-Kind Contribution: $121,044
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
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<td>1</td>
<td>Retraine SB &lt;100</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Impro, Mgmt Skills</td>
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<td>8-60 0-10</td>
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<td>*$15.60</td>
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<td>2</td>
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<td>3</td>
<td>Veterans SB&lt;100 Retraine</td>
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<td>8-60 0-10</td>
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<td></td>
<td></td>
<td>Weighted Avg: 27</td>
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</tbody>
</table>

*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 1-3: $22 SB Non-Priority
- **Counties:** Placer, San Diego, Los Angeles
- **Occupations to be Trained:** Accounting Staff, Administrative Staff, Benefit Trust Staff, Directors, IRA Staff, Sales, Managers, Owner, Information Technology (IT), Pension Staff
- **Union Representation:** ☐ Yes ☒ No
- **Health Benefits:** Job #1: $1.95 per hour

**SUBCONTRACTORS**

- **Development Services:** Sierra Consulting Services in El Dorado Hills assisted with development of this project for a flat fee of $9,000.
- **Administrative Services:** Sierra Consulting Services will also provide administrative services for a fee not to exceed 13% of payment earned.
- **Training Vendors:** To Be Determined

**OVERVIEW**

Founded in 1974 and headquartered in Roseville, Polycomp Administrative Services, Inc. (Polycomp) ([www.polycomp.net](http://www.polycomp.net)) is a woman-owned retirement and financial planning company. Polycomp provides customized retirement plans and consultation services for individuals, employers, and associations. The Company does business with clients and customers...
throughout the United States. The Company has two additional California facilities: San Diego (San Diego County) and Woodland Hills (Los Angeles County).

**Need for Training**

This will be Polycomp’s sixth ETP Agreement, but the only one within the last five years. In its last ETP Agreement (ET13-0105), Polycomp’s intent was to improve employee knowledge of products and services. Training was also designed to ensure employees provide accurate information to clients while maintaining compliance with changing federal and state tax regulations. However, Polycomp was not able to start training (See Prior Project table). For this proposal, the Company will continue the Prior Project goals to focus on improving employee knowledge of products, services and regulations.

As a small financial planning company, Polycomp must remain competitive with larger companies offering similar services. To help accomplish this, Polycomp is converting to a paperless work environment by integrating new accounting and workflow software into the organization. The software programs will allow the Company to improve productivity, effectiveness, quality control, and business growth.

Given a shortage of employee talent within its industry, and Polycomp realizes the value of matching current employees with future open positions. The Company is developing an employee succession plan, including a career path and training that will allow advancements into higher positions and promote the importance of personal development and growth.

**Retrainee - Job Creation**

In 2015 and 2016 Polycomp increased its overall staff by 13 full-time positions. The Company estimates expansion will continue into 2017 and 2018 due to an increase in customer demand and a projected revenue growth of 4% to 5% per year. As a result, Polycomp has committed to adding six new jobs (Job Number 2) in the next two years. The new positions will fill needs in the Accounting, Benefit Trust, IRA, Pension, and Sales occupations.

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 date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

**Training Plan**

**Business Skills**: Training will be offered to all occupations. Training is necessary to have a better understanding of measuring profitability and identifying areas where efficiencies need improvement. Managers will learn skills to help with employee retention and increase levels of employee engagement.

**Commercial Skills**: Training will be offered to Benefit Trust Staff, IRA Staff, Pension Staff, and Managers. Through this training, trainees will be able to answer client questions with minimal research, problem-solve, and find unique solutions to address issues.

**Computer Skills**: Training will be offered to all occupations to increase understanding of a paperless work environment and experience greater efficiencies with internal processes. Courses will include new software applications and equipment along with Client Relationship Management Software, Docusign, and Adobe E-Signature.

**Continuous Improvement**: Training will be offered to all occupations. Training will focus on personal development by learning to work efficiently in teams, improving time management, and
enhancing communication skills. Training will help employees accomplish their succession plan goals.

**Management Skills**: Training will be offered to Managers, Directors, and the Owner. Management training will focus on the development of management’s leadership and coaching skills. Trainees will receive training in Team Building, Coaching Procedures, Decision Making, and Leadership.

**Computer-Based Training**

Polycomp plans on providing Computer Based Training (CBT) to all occupations. CBT courses will primarily consist of product, software and process knowledge. CBT hours are capped at 50% of total training hours per-trainee.

**E-Learning and Video Conference**

Polycomp utilizes online training as a delivery method to provide training to employees at other locations to minimize training costs. Training is provided online by a live instructor. This delivery method is cost effective, efficient, and suitable for the employer and trainees. E-Learning and Video Conference will complement Class/Lab training.

**Temporary to Permanent Hiring**

Polycomp intends to train workers under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees (all occupations in Job Number 2 and may include occupations in Job Number 3) on a temporary basis with the intention of hiring them into full-time, permanent positions after training. According to Polycomp the average time for “converting” temporary workers into full-time permanent employment is four months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums 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 Polycomp 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.

**Veterans Program**

Polycomp currently employs Veterans as a part of their full-time workforce. Veteran trainees are represented in Job Number 3.

**RECOMMENDATION**

Staff recommends approval of this proposal.
PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>*ET13-0105</td>
<td>Roseville, Woodland Hills, San Diego</td>
<td>07/26/2012 – 07/25/2014</td>
<td>$55,290</td>
<td>$0 (0%)</td>
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</table>

*ET13-0105: Poor performance in this Agreement was caused by a change in ownership and downsizing. Many customers using Polycomp services began going out of business in 2011/2012. The cancellation of services prompted Polycomp to eliminate positions and transfer employees into other roles. The position of HR Coordinator, whose role was managing the ETP Agreement, was eliminated. Training occurred during this Agreement but Polycomp did not have enough hours to qualify for reimbursement and training was not recorded. Business has since increased and for this Agreement Polycomp has retained a consultant to help with administration tasks. The Company also assigned an internal employee to manage the Agreement.
Exhibit B: Menu Curriculum

Class/Lab Hours/Videoconference/E-Learning

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Accounting
- Application Improvement
- Business Writing
- Communication Skills
- Customer Service
- Dealing with Difficult People
- Employee Coaching
- Essential Skills for the New Supervisor
- Excel Marco Training
- Leadership
- Marketing/Sales Techniques
- New Hire Training
- Operational Skills
- Paperless Processing – Individual Retirement Account (IRA)
- Planning and Organization
- Project Management and Methodology
- Relationship Building
- Retaining Customers
- Sales
- Strategic Planning
- Time Management
- Work-Flow Software – IRA

**COMMERCIAL SKILLS**
- Accredited Pension Administrator (APA)
- Accredited Pension Representative (APR)
- Benefit Trust Services (BTS) Technical Training
- Certified Employee Benefits Specialist (CEBS)
- Certified IRA Services Professional (CISP)
- Certified Pension Consultant (CPC)
- Compensation Management Specialist (CMS)
- Enrolled Retirement Plan Agent (ERPA)
- Group Benefits Associate (GBA)
- IRA Technical Training
- Qualified Plans (QP) Technical Training
- Qualified 401(k) Administrator (QKA)
- Qualified Pension Administrator (QPA)
- Retirement Plans Associate (RPA)
- Self-Directed IRA Professional (SDIP)
COMPUTER SKILLS
- Adobe E-Signature
- Client Relationship Management Software
- Docusign
- Microsoft Office (Intermediate and Advanced)
- Quickbooks
- Software Applications and Equipment

CONTINUOUS IMPROVEMENT
- Change Management
- Communication Skills
- Cross Training
- How to Coach and Mentor
- Lean Procedures and Practices
- Meeting Management
- Process Improvement
- Production Operations/Workflow
- Project Management
- Strategic Planning
- Team Building
- Time Management

MANAGEMENT SKILLS (managers and supervisors only)
- Administration
- Coaching Procedures
- Decision Making
- Effective Meeting for Leaders
- Leadership
- Supervisor Skills
- Teambuilding

CBT Hours

0-10

COMPUTER SKILLS
- 1099 Prep/Payables (1 hour)
- Affordable Care Act (ACA) Reporting (1 hour)
- Anti-Money Laundering (1 hour)
- Bank Secrecy Act (BSA) (1 hour)
- Best Practices for a Successful Plan Audit (1 hour)
- BillQuick (2 hours)
- Business Writing (4 hours)
- Byrne Software (1 hour)
- Collection Topics (1 hour)
- Cyber Training (2 hours)
- Do Automatic Enrollment Plans Work (1 hour)
- Eligibility and Forfeitures (1 hour)
- Form 5500 Update (1 hour)
- Keep Your Plans in Compliance with Employee Plans Compliance Resolution System (EPCRS) (1 hour)
- Microsoft Excel (2 hour)
- Microsoft Powerpoint (1 hour)
- Microsoft Word (1 hour)
- Mid-Year Changes to 401(k) Plans (1 hour)
- New Comparability Plans (1 hour)
- Payroll Updates (1 hour)
- Recordkeeping – Wires, Money Orders (1 hour)
- Responsibilities of 3(16), 3(21) and 3(38) Fiduciary and Third Party Administrators (1 hour)
- Risk Assessment and Customer Due Diligence (1 hour)
- Sharefile Training (1 hour)
- Skill Path – Communication Training (2 hours)
- Suspicious Activity Reporting (SAR) Filing (1 hour)
- USA PATRIOT Act (1 hour)

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per-trainee.
Training Proposal for:
Price Pump Manufacturing Co. dba Price Pump Company

Small Business
ET17-0357

Approval Date: December 9, 2016

ETP Regional Office: Sacramento
Analyst: J. Lazarewicz

CONTRACTOR

- Type of Industry: Manufacturing

- Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees
  - California: 31
  - Worldwide: 31
  - Number to be trained: 29

- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 6%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $19,604
- In-Kind Contribution: $15,834
TRAINING PLAN TABLE

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<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
</table>

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): Sonoma
- Occupations to be Trained: Machinist, Engineer, Assembly/Production Staff, Quality Control, Sales/Customer Service, Managers/Supervisors, Purchasing Staff
- Union Representation: Yes
- No
- Health Benefits: Job #1: $1.60 per hour

SUBCONTRACTORS
- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1932 and located in Sonoma, Price Pump Manufacturing Co. dba Price Pump Company (Price Pump) specializes in the manufacturing of Centrifugal and Air Operated Diaphragm pumps. Their customer base includes industrial, manufacturing, water treatment, and OEM companies worldwide.

NEED FOR TRAINING

This will be Price Pump’s second ETP Agreement, and the second within the past five years. Under the previous Agreement, Price Pump’s training plan focused on Lean Manufacturing and advanced training to meet ISO 9001-2008 certification standards. The training plan concentrated on upgrading the skill sets of Machinists, Engineers, and Assemblers to improve manufacturing efficiencies, product quality, and eliminate waste.
Training in this proposal will focus on implementing the U.S. Department of Energy’s new pump efficiency standards. Price Pump will provide training to employees on how to perform extensive testing and redesigning of Centrifugal and Air Operated Diaphragm pumps to meet efficiency standards. This training will also give trainees transferrable skills that will make them more promotable in the manufacturing industry.

In an effort to maintain ISO 9001-2008 compliance, Price Pump will also provide continuous improvement training to all occupations.

Training Plan

Business Skills: This training will be delivered to Sales/Customer Service Staff and Purchasing Staff. Training will focus on general business fundamentals with topics including Inventory Control and Accounting Practices. This will result in an increased understanding of business principles.

Commercial Skills: This training will be delivered to all occupations. Training will focus on safety procedures with topics including Hazard Communication and Personal Protective Equipment Safety. This will provide an increased understanding of company safety policies and practices.

Computer Skills: This training will be delivered to all occupations. Training will focus on each occupation’s needs and include Enterprise Resource Planning. Topics include Labview software, 3D Solidworks and CAD/CAM. Training will enable employees to perform their job duties using company-required computer systems/software.

Continuous Improvement: This training will be delivered to all occupations. Topics include Internal Auditing, ISO 9001-2015, Lean Manufacturing, and Communication Skills. Trainees will learn how to properly control and process materials, meet ISO 9001-2015 compliance standards, reduce or eliminate waste, and improve communication. Training will ensure trainees have the skills to be efficient and effective in their jobs.

Management Skills: Training for Managers and Supervisors will focus on teamwork and effective leadership. Training will include Shop Floor Managing and Managing Difficult People.

Manufacturing Skills: This training will be delivered to Machinists, Engineers, and Assembly/Production Staff. Topics include CMM Inspection, Data Acquisition, Centrifugal and AOD pump, and Shipping/Packing Methods. Training will increase efficiency and reduce production waste.

Productive Laboratory (PL) – Manufacturing Skills

Price Pump has determined that hands-on training during production is a valuable training method for the acquisition of skill sets and demonstration of competency levels. Price Pump is requesting a maximum of 24 hours of PL Manufacturing Skills training with a trainer-to-trainee ratio of 1:3 instead of 1:1 because trainees will be working on similar projects. This will allow the trainer to get trainees back to their work assignments sooner, while trainees can also learn from each other during training. Trainees will receive training on CNC machine programming, designing fixtures for new parts, and documenting set-ups and programming for part inspection.

All PL trainers will be in-house subject matter experts exclusively dedicated to instruction. The trainer will demonstrate, observe, oversee, and provide feedback during each step of the PL training process.
Computer-Based Training

Computer-based training (CBT) will be delivered to lay a foundation that will be expanded on in classroom/laboratory training. CBT training topics include Labview Software, CAM Software, and CAD Software. CBT will not exceed 50% of any trainee’s total training hours.

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 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.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
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<tbody>
<tr>
<td>ET15-0186</td>
<td>Sonoma</td>
<td>07/07/14 – 10/06/15</td>
<td>$12,896</td>
<td>$12,896</td>
<td>(100%)</td>
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</table>


**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8-60

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Inventory Control
- Accounting Skills

**COMMERCIAL SKILLS**
- Personal Protective Equipment (PPE) Safety
- Hazard Communication
- Electrical Safety
- Forklift Safety
- Fire Safety
- Back Safety

**COMPUTER SKILLS**
- Enterprise Resource Planning (ERP)
- 3D Solidworks
- Computer-Aided Design (CAD) Software
- Computer-Aided Manufacturing (CAM) Software

**CONTINUOUS IMPROVEMENT**
- Internal Auditing
- ISO 9001-2015
- Lean Manufacturing
- Communication Skills

**MANAGEMENT SKILLS (management only)**
- Shop Floor Managing
- Managing Difficult People

**MANUFACTURING SKILLS**
- Coordinate Measuring Machine (CMM) Inspection
- Data Acquisition
- Centrifugal and Air-Operated Disphragm (AOD) pump
- Shipping/Packing Methods

**OSHA 10/30 (Certified OSHA Instructor)**
- OSHA 10 (Requires completion of 10 hours)
- OSHA 30 (Requires completion of 30 hours)

Safety Training will be limited to 10% of total training hours per-trainee. This cap does not apply to OSHA 10/30.
Productive Lab

0-24

**MANUFACTURING SKILLS** (1:3 Trainer-to-Trainee Ratio)
- Machine Shop
- Mechanical Seal Troubleshooting

CBT Hours

0-30

**COMPUTER SKILLS**
- Labview Software (10 hours)
- CAM Software (10 hours)
- CAD Software (10 hours)

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours. PL is capped at 24 hours per-trainee.
**DELEGATION ORDER**

**RETRAINEE - JOB CREATION**

Training Proposal for:

**Agreement Number: ET17-0316**

Approval Date: December 14, 2016

ETP Regional Office: Sacramento  
Analyst: D. Jordan

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**PROJECT PROFILE**

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<td>Job Creation Initiative</td>
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<td>Priority Rate SET</td>
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<th>Counties Served:</th>
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</tr>
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<tbody>
<tr>
<td>San Joaquin, Fresno, Sonoma</td>
<td>[ ] Yes [ ] No</td>
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Union(s): [ ] Yes [ ] No  
Plumbers and Pipefitters 62, 38, 246, 343, 403, 442, 447, 467; Heat and Frost Insulators 16

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
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<tbody>
<tr>
<td>CA: 125</td>
<td>U.S.: 146</td>
</tr>
<tr>
<td>Worldwide: 146</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>17%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>( % of total trainees)</td>
<td>1%</td>
</tr>
</tbody>
</table>

---

**FUNDING DETAIL**

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>= Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$76,572</td>
<td>$0</td>
<td>$0</td>
<td>$76,572</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required  
$295,697
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineet SET Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, PL-Comm Skills</td>
<td>16</td>
<td>8 - 200</td>
<td>0</td>
<td>$630</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraineet HUA Priority Rate SET</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, PL-Comm Skills</td>
<td>94</td>
<td>8 - 200</td>
<td>0</td>
<td>$594</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Retraineet Job Creation Initiative HUA SET Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, PL-Comm Skills</td>
<td>9</td>
<td>8 - 200</td>
<td>0</td>
<td>$700</td>
</tr>
<tr>
<td>4</td>
<td>Retraineet HUA Priority Rate Veterans</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, PL-Comm Skills</td>
<td>6</td>
<td>8 - 200</td>
<td>0</td>
<td>$726</td>
</tr>
</tbody>
</table>

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

**Minimum Wage by County:**
- **Job Numbers 1:** (SET/Priority Industry) $21.28 per hour for Sonoma County;
- **Job Number 2:** (SET/HUA/Priority Industry) $11.70 per hour for San Joaquin and Fresno Counties;
- **Job Number 3:** (SET/HUA/Priority Industry) $10.00 per hour for San Joaquin and Fresno Counties;
- **Job Number 4:** (SET/HUA/Priority) $15.60 per hour for San Joaquin and Fresno 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 $2.28 per hour may be used to meet the Post-Retention Wage for Job Number 1.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engineers Drafters</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Project Management P1</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

## INTRODUCTION

Process Cooling International, Inc. dba Applied Process Cooling Corp. (APCCO) ([www.apcco.net](http://www.apcco.net)), was established in 1981 and is headquartered in Modesto. APCCO provides specialized design, installation, service, support, and conceptual problem-solving of industrial refrigeration systems. These systems are used in the food and beverage industry including winery, cold storage, food freezing, poultry processing, juice processing, bottling plant, fruit pre-cooling, and food processing facilities.

## PROJECT DETAILS

This will be APCCO’s fourth ETP Agreement in the last five years. Training in the previous Agreement focused on expanding into the wine industry through new marketing strategies and processes. Some duplicate courses will be offered under this proposal, but only to trainees who

<table>
<thead>
<tr>
<th>Project Management P2</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technician T2</td>
<td>5</td>
</tr>
<tr>
<td>Technician T3</td>
<td>6</td>
</tr>
<tr>
<td>Managers</td>
<td>1</td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
</tr>
<tr>
<td>Administrative</td>
<td>9</td>
</tr>
<tr>
<td>Engineers Drafters</td>
<td>8</td>
</tr>
<tr>
<td>Project Management P1</td>
<td>5</td>
</tr>
<tr>
<td>Project Management P2</td>
<td>4</td>
</tr>
<tr>
<td>Sales/Parts</td>
<td>6</td>
</tr>
<tr>
<td>Technician T1</td>
<td>7</td>
</tr>
<tr>
<td>Technician T2</td>
<td>43</td>
</tr>
<tr>
<td>Technician T3</td>
<td>10</td>
</tr>
<tr>
<td>Managers</td>
<td>2</td>
</tr>
<tr>
<td><strong>Job Number 3</strong></td>
<td></td>
</tr>
<tr>
<td>Administrative</td>
<td>1</td>
</tr>
<tr>
<td>Technician T1</td>
<td>3</td>
</tr>
<tr>
<td>Technician T3</td>
<td>5</td>
</tr>
<tr>
<td><strong>Job Number 4</strong></td>
<td></td>
</tr>
<tr>
<td>Engineer</td>
<td>1</td>
</tr>
<tr>
<td>Project Management P1</td>
<td>1</td>
</tr>
<tr>
<td>Project Management P2</td>
<td>1</td>
</tr>
<tr>
<td>Technician T1</td>
<td>1</td>
</tr>
<tr>
<td>Technician T2</td>
<td>1</td>
</tr>
<tr>
<td>Technician T3</td>
<td>1</td>
</tr>
</tbody>
</table>
did not participate in the previous Agreement or it will be at an advanced level such that training will not be duplicated.

To remain competitive, APCCO must increase productivity, modernize communication, streamline processes and improve technical skills up to industry standards. To do this, the Company will be implementing a new Enterprise Resource Planning (ERP) system: ERP/Vista.

Additionally, recent growth has led to the hiring of new employees and incumbent employees taking on new roles and responsibilities. Training is especially critical given the Company’s difficulty in recruiting experienced journeymen and qualified workers.

Retrainee - Job Creation

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

APCCO will be expanding existing business capacity by adding newly hired employees. The Company has committed to hiring 9 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. Trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Training will be delivered by in-house subject matter experts.

**Business Skills (20%)**: Training will be offered to all occupations. Training will focus on cross-training, communication, and ERP/Vista implementation. Training will improve communication within departments and with customers.

**Commercial Skills (20%)**: Training will be offered to all occupations. Trainees will receive training on intermediate refrigeration system processes. Skills will help employees build better products.

**Computer Skills (35%)**: Training will be offered to all occupations. Training will focus on ERP/Vista software training. However, training on additional engineering, project management, and business management software will be offered. These skills will help employees navigate business-critical software.

**Continuous Improvement (5%)**: Training will be offered to all occupations. Training will include advanced leadership, teambuilding, strategic planning, and critical thinking. Trainees will learn how to work together to complete tasks.

**Hazardous Materials (5%)**: Training will be offered to all occupations except Administrative and Sales Staff. Staff will receive training on procedures that will exceed Federal and State safety requirements for handling hazardous materials.

**Productive Laboratory (10%)**

Productive Laboratory (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.
APCCO has Technicians with various skill levels and some that are completely new to the industry. Training in PL Commercial Skills is necessary to bring them up to a consistent and standardized skill level. The Company will offer up to 24 hours of PL, with a 1:2 trainer-to-trainee ratio. Since the work is highly technical in nature, tasks are completed by two or more workers. This will also allow trainees to work in pairs and learn from each other. PL will supplement Class/Lab. Training will be delivered by experienced Journeyman or Foreman Technicians with more than 10 years’ experience in the industry.

HUA/SET

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 employed in a priority industry may qualify for a SET wage modification of up to 25% below the statewide average hourly wage, from $28.37 to $21.28 per hour. The wage modification is requested for trainees in Job Number 1.

The 106 trainees in Job Numbers 2-4 work in San Joaquin and Fresno Counties, High Unemployment Areas (HUA) with unemployment exceeding the state average by 25%. These trainees qualify for the ETP Standard Minimum Hourly Wage instead of the SET Statewide Average Hourly Wage. Further, the Panel may reduce the ETP Standard Minimum Hourly Wage for these trainees by up to 25% if post-retention wages exceed start-of-training wages.

This wage modification is requested for Job Number 2, from $15.60 to $12.00; and for Job Number 3, from $12.77 to $12.00. [Note: Job Number 4 trainees will qualify at the ETP Standard Minimum Hourly Wage.]

Commitment to Training

APCCO spends $90,000 on training per facility annually. Current and past training provided to employees include all state and federal mandated training. This training includes sexual harassment prevention, global harmonized system hazard awareness, weekly safety tailgates, blood-borne pathogens, first aid, CPR, Lock Out Tag Out, accident reporting, emergency evacuation, fall protection, respiratory protection, safety inspections, hearing conservation, fire prevention, heat illness and prevention, and machine guarding.

ETP funds will not displace APCCO'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

APCCO’s Human Resources Director will administer the training program along with help from the Human Resources Assistant.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Higher support costs are also available to reach participants for this program. APCCO is committed to employing Veterans.
Union Support

All trainees are represented unions: the Plumbers and Pipefitters 62, 36, 246, 343, 403, 442, 447, and 467 Union as well as the Heat and Frost Insulators 16 Union. Letters of support have been received from these unions.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>*ET14-0295</td>
<td>Modesto, Sanger, Windsor</td>
<td>01/25/2014-01/24/2016</td>
<td>$131,820</td>
<td>$75,269 (57%)</td>
</tr>
<tr>
<td>ET13-0198</td>
<td>Modesto, Sanger, Healdsburg, Belmont</td>
<td>10/18/2012-12/31/2013</td>
<td>$46,800</td>
<td>$36,322 (78%)</td>
</tr>
<tr>
<td>ET11-0221</td>
<td>Modesto, Sanger, Healdsburg, Belmont</td>
<td>04/18/2011-04/17/2012</td>
<td>$44,286</td>
<td>$36,690 (87%)</td>
</tr>
</tbody>
</table>

*ET14-0295: APCCO did not perform as expected because resources had to be allocated to opening two new divisions, restructuring other divisions, and making management changes. Additionally, once these changes were completed, the Company experienced significant growth with increased marketing and business development.

The Company’s performance in the previous Agreement was due to a combination of unforeseen events decreasing resources and time to move ahead with the training plans. The Company is confident that this proposal will be successful since it performed well in two previous Agreements (ET11-0221 and ET13-0198) and is well versed in successful implementation of ETP-funded training.
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Process & Product Cross Training
- Communication Skills
- Marketing Processes
- Sales Processes
- Project Management
- ERP/Vista Implementation

**COMMERCIAL SKILLS**
- Welding Processes
- Intermediate Welding Processes
- Lift Training
- Refrigeration System Troubleshooting
- Intermediate Refrigeration System Troubleshooting
- Mechanical Processes Intermediate
- Intermediate Mechanical Processes
- Refrigeration System Servicing Processes
- Intermediate Refrigeration System Servicing Processes
- Tagging/Labeling
- Engineering Process

**COMPUTER SKILLS**
- Adobe Professional Suite
- Intermediate/Advanced Microsoft Project
- Intermediate/Advanced Microsoft Suite
- WEN Pipe and Labor Estimating
- AutoCAD MEP
- Business System
- ERP/Vista Software
- 3D/Revit Software

**CONTINUOUS IMPROVEMENT**
- Team Building
- Strategic Planning
- Leadership
- Critical Thinking
- Management

**HAZARDOUS MATERIALS**
- Basic Ammonia Handling and Precautions
- Intermediate Ammonia Handling and Precautions
- Lock Out and Tag Out
- Confined Space
PL Hours
0-24

COMMERCIAL SKILLS (must not exceed 1:2 trainer-to-trainee ratio)
- Compressor Rebuild Processes
- Ammonia System Pumpdown Processes
- Ammonia Systems Retrofits/Upgrades

Safety Training will be limited to 10% of total training hours per-trainee.

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
August 11, 2016

Dear Sirs,

I’m writing to verify that Local 62 is a DAS registered training facility. We are part of Pipe Trades District Council #36 Plumbers, Pipe and Refrigeration Fitters Apprentice and Journeyman Training Trust. Our DAS File number is 00061. Our Dept. of Labor Program ID number is CA000070052.

Applied Process Cooling Corporation is signatory with our District Council and is authorized to provide union training.

If you have any questions, please contact me at the number below.

Stephen Cry
Training Coordinator Local 62
831-633-6091
stephen@pipetrades62.com
August 31, 2016

TO WHOM IT MAY CONCERN:

U.A. Local 38 provides its signatory contractors with the most highly trained and skilled plumbers, pipefitters, HVAC technicians and welders in the industry.

Applied Process Cooling Corporation (APCCO) is a signatory contractor which employs members from Local 38. At times the opportunity comes along for APCCO to supplement their employees’ and our members’ training in addition to the training Local 38 provides for them. When that opportunity arises, California’s Employment Training Panel funding would be a great help for APCCO to help offset their costs of supplemental training for their employees and our members.

If you need additional information, contact me at 415.626.2000.

Sincerely,

LARRY MAZZOLA, JR.
August 16, 2016

To Whom It May Concern:

Applied Process Cooling Corporation is a signatory contractor with our union and has provided long-term employment and job opportunities to many of our members over the years and continue to do so today.

As a union, U.A. Local #246 takes pride in developing and maintaining a professional and highly skilled workforce in the plumbing, pipe fitting, and refrigeration/HVAC trades. We believe that unions and contractors working together and investing in our members/employees is the pathway to growth and success in everyone.

Therefore, we support Applied Process Cooling Corporation in its dedication to provide supplemental job training to its employees and encourage you to facilitate its efforts.

Sincerely,

Danny Wright
Business Manager
Plumbers, Pipe, & Refrigeration Fitters
U.A. Local #246
August 24, 2016

APCCO
4812 Enterprise Way
Modesto, CA 95356

Attn: Kim Mans

Dear Ms. Mans:

We at the Plumbers and Steamfitters U.A. Local 343 believe our members should be as highly skilled as possible and the best trained in the industry. Applied Process Cooling Corporation is a signatory contractor and has the opportunity to train their employees (who are also members) in some areas that are in addition to what we at the Union would normally provide. Therefore, we feel this would be a great advantage for our members.

If you should need any additional information, please feel free to contact me at (707) 644-4071.

Sincerely,

Steven B McCall
Business Manager

SBM:pb
To Whom It May Concern,

We at the Plumbers & Pipefitters U.A. Local 403 believe our members should be highly skilled as possible and the best trained in the industry. Applied Process Cooling Corporation is a signatory contractor and has the opportunity to train their employees (who are members) in some areas that are in addition to what we at the Union would normally provide. Therefore, we feel this would be a great advantage for our members.

If you should need any additional information please feel free to contact me at the office at (805) 543-2416.

Sincerely,

Jeff Thomas
Business Manager, Local Union 403
To Whom It May Concern,

We at the Plumbers & Pipefitters U.A. Local 442 believe our members should be as highly skilled as possible and the best trained in the industry. Applied Process Cooling Corporation is a signatory contractor and has the opportunity to train their employees (who are also members) in some areas that are in addition to what we at the Union would normally provide. Therefore, we feel this would be a great advantage for our members.

If you should need any additional information please feel free to contact me at (209) 338-0751.

Sincerely,

William F. Taylor
Business Manager

WFT:pt
aflcio/opeiu 29
August 29, 2016

To Whom It May Concern:

We at the Plumbers & Pipefitters U.A. Local 447 believe our members should be as highly skilled as possible and the best trained in the industry. Applied Process Cooling Corporation is a signatory contractor and has the opportunity to train their employees (who are also members) in some areas that are in addition to what we at the Union would normally provide. Therefore, we feel this would be a great advantage for our members.

If you should need any additional information please feel free to contact me at (916) 338-0751.

Sincerely,

[Signature]

Aaron Stockwell
Financial Secretary &
Business Manager

Encl.

ATS:jh
opetu#29/afl-cio
August 11, 2016

To Whom it may concern

UA Local 467 trains and maintains a highly skilled workforce of Plumbers, Pipefitters and HVACR Service technicians. We recognize that Applied Process Cooling Corporation is a signatory contractor who regularly trains our members in their employ in procedures and specialty equipment beyond our normal training scope. We believe this benefits both APPCO and our members and endorse this practice.

If I can be of any further assistance please call.

Sincerely,

Chris Collins
Business Agent II
August 15, 2016

To Whom It May Concern,

We at the Heat & Frost Insulators, Local 16, believe our members should be as highly skilled as possible and the best trained in the industry. Applied Process Cooling Corporation is a signatory contractor and has the opportunity to train their employees (who are also members) in some areas that are in addition to what we at the Union would normally provide. Therefore, we feel this would be a great advantage for our members.

If you should need any additional information please feel free to contact me at (707) 748-1616.

Sincerely,

Mel Breshears
Business Manager
DELEGATION ORDER

Training Proposal for:
PSM Industries, Inc.

Small Business
ET17-0368

Approval Date: December 28, 2016
ETP Regional Office: North Hollywood    Analyst: M. Niquet

CONTRACTOR

- Type of Industry: Manufacturing
- Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 98
  Worldwide: 210
  Number to be trained: 80
- Owner ☐ Yes ☒ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 2%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $49,920
- In-Kind Contribution: $32,640
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraining Priority Rate HUA</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills</td>
<td>80</td>
<td>8-60</td>
<td>0</td>
<td>$624</td>
</tr>
</tbody>
</table>

*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: $26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: 80
- Union Representation: □ Yes □ No
- Health Benefits: Job #1: $1.86 per hour

**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), 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.

Due to increasing demand for car parts, there has been a push by the automotive industry on suppliers to increase production and lower costs. The strong US dollar has made PSM’s car parts more expensive relative to other countries, causing customers to outsource to other states and overseas where labor costs are lower. This has resulted in lower company revenue the past few years.

To reduce costs and remain competitive, PSM must improve efficiency and productivity by training employees in process automation and how to better leverage technology. PSM also
needs to implement a wide range of industry best practices such as lean manufacturing, reducing scrap and rework, and improving quality skills. This is PSM’s third ETP contract, the first in the last 5 years.

Training Plan

In their previous project (ET13-0405), PSM focused on ISO 9001-2008 designed to streamline processes and maximize efficiency through proven problem solving. In another previous project (ET11-0287), training focused on basic production, product quality, and reduction of errors and waste.

The focus of this proposal is the Company’s new quality process, TA-16-16949AQP, and new environmental process, ISO 14001. Some curriculum courses are repeated from the last Agreement; however, no trainee will repeat those courses.

Training will take place at the Company’s Los Angeles facility, delivered by an in-house subject matter experts and training vendors.

Business Skills – Training will be provided to all occupations to improve employee knowledge of the supply chain, beginning with the raw materials (powder metal) stage. Employees will learn to work with suppliers to plate, heat treating, inspect and, pack/ship parts according to customer requirements.

Computer Skills – Training will be provided to all occupations to streamline processes and maximize efficiency through problem-solving techniques.

Continuous Improvement – Training will be provided to all occupations to improve processes and maximize efficiency. Training will focus on leadership and quality concepts.

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.

Temporary to Permanent Hiring

PSM will train 10 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 3 months. 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.

High Unemployment Area (HUA)

PSM is located in the Los Angeles WillowBrook area bordering West Compton. It is located in a High Unemployment Area (HUA). This is a region 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 for trainees. The company is requesting the HUA hourly wage modification, from $16.48 to $12.36.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by PSM under an ETP Agreements completed within the last five years:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0405 *</td>
<td>Los Angeles</td>
<td>06/30/13-06/29/15</td>
<td>$49,920</td>
<td>$49,920 (100%)</td>
</tr>
<tr>
<td>ET11-0287**</td>
<td>Los Angeles</td>
<td>05/15/11-05/15/13</td>
<td>$35,880</td>
<td>$35,880 (100%)</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab Hours

8-60  Trainees may receive any of the following:

**BUSINESS SKILLS**
- Supply Chain Management
- Project Management
- Leadership
- Customer Service

**COMPUTER SKILLS**
- ERP System
- Global Shop
- WinSPC
- Pricing Software
- Vision System
- Microsoft Office
- Solidworks

**CONTINUOUS IMPROVEMENT**
- 5S Training
- TS-16949 AQP Certification
- ISO-14001
- Productivity Improvement
- Waste Reduction
- Increase Process Flow
- Rework and Waste Reduction
- Quality Management Skills and Operations
- Leadership Skills
- Lean Manufacturing
- Kaizen
- Inventory Control

**MANUFACTURING SKILLS**
- Work Instruction
- Automation
  - CMM
  - Pin Insertion Machines
  - Robots
  - Vision System
  - Torque test
  - Resonance Testers
- Equipment Operation
  - Powder blenders
  - Forklifts
  - Molding presses
  - Sintering furnaces
- Coining presses
- Tempering
- Deburr
- Wheel abrasion
- Plastic impregnation

- Quality Skills
  - Basic Training
    a. Micrometer
    b. Dial Indicator
    c. Visual Inspection
    d. Dimensional Checks
  - Intermediate Training:
    a. In-process inspections (all steps of process),
    b. Final inspections
    c. Non-Conformance Reports (NCRs)
    d. Suspect Material Reports (SMRs)
  - Advanced Training:
    a. Certs
    b. Gage R&R
    c. Density determination
    d. PPAP for new jobs
    e. Root Cause Analysis and Corrective Actions including effectiveness of solution

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
DELEGATION ORDER

Retrainee - Job Creation
Training Proposal for:
Reliant Financial Corporation

Small Business
ET17-0370

Approval Date: January 5, 2017
ETP Regional Office: San Diego Analyst: H. Bernard

CONTRACTOR

- Type of Industry: Financial Services
- Priority Industry: [ ] Yes [x] No
- Number of Full-Time Employees:
  - California: 83
  - Worldwide: 90
  - Number to be trained: 93
- Owner: [x] Yes [ ] No
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): [ ] Yes [x] No
- High Unemployment Area (HUA): [ ] Yes [x] No
- Turnover Rate: 18%
- Repeat Contractor: [ ] Yes [x] No

FUNDING

- Requested Amount: $49,104
- In-Kind Contribution: $146,847
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SB &lt;100</td>
<td>Business Skills Commercial Skills Computer Skills</td>
<td>83</td>
<td>8 - 60</td>
<td>0</td>
<td>$880</td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
<td>Weighted Avg: 24</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraine Business Skills</td>
<td>Business Skills Computer Skills</td>
<td>10</td>
<td>8 - 60</td>
<td>0</td>
<td>$880</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 24</td>
<td></td>
</tr>
</tbody>
</table>

*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 and 2: $22 SB Non-Priority
- **County(ies):** Orange
- **Occupations to be Trained:** Operations Staff, Technical Staff, Administrative Support Staff, Sales Staff, Supervisors/Managers, Owner
- **Union Representation:** ☑ Yes
- **Health Benefits:** Job #’s 1 and 2: $2.07 per hour

## SUBCONTRACTORS

- **Development Services:** Training Funding Source assisted with development for a flat fee of $5,900.
- **Administrative Services:** Training Funding Source will also assist with administration for a fee not to exceed 13% of funds earned.
- **Training Vendors:** To Be Determined

## OVERVIEW

Founded in 1989, Reliant Financial Corporation (Reliant) ([www.goldacceptance.com](http://www.goldacceptance.com)) is a financial services company that provides sub-prime auto financing for customers who are first-time buyers or have delinquent accounts and are trying to reestablish credit. The Company partners with auto dealers to offer potential customers loans if they have been denied from other traditional lenders. The Company’s interest rates range from 15% to a maximum of 24% with an average of 20%. The Company is a small business that has financed 100,000 customers and provides loans to customers both inside and outside of California. The Company is located in the City of Orange and plans to include its entire staff in its training program. This will be the Company’s first ETP Agreement.
**Need for Training**

Reliant is facing challenges both internally and externally, within the financial services industry, that require training. Internally, the Company is implementing a new online platform to allow customers to make loan payments electronically. Additionally, the Company has significantly updated its financing software systems, MegaTerm and Megalmage which affects most staff and will require training. Reliant utilizes these loan processing and document management systems for many aspects of job function and are updated quarterly. These technological changes will help employees improve service.

Within the financial industry, the Company faces heavy regulations and continual changes. Reliant operates by guidelines released by the Consumer Financial Protection Bureau (CFBP). Although the Company is not required to follow CFBP guidelines, the Company implements CFBP guidelines to be a leader in the industry. Also, employees must be familiar with policies specific to the auto industry, including Department of Motor Vehicles and Auto Insurers. These policies and guidelines are continually changing. Hence, employees must be trained constantly to ensure the Company is at the forefront of the industry.

**Training Plan**

To stay current with practices, Reliant will provide training four to five times per week. Most of the training will be provided by the Human Resources Manager and the Company’s Owner. Some training may be provided by vendors (to be determined) as needed. Reliant represents that no training on debt collections will be provided under the ETP project.

**Business Skills:** Training will be provided to Operations, Technical, Administrative Support, and Sales Staff and Supervisors/Managers. Training will include communication skills, customer service, teambuilding, decision making, and project management. These training sessions will ensure that the Company is providing the highest service for its customers. Training will also focus on leadership skills for Managers/Supervisors as well as for lower lever staff who are interested in advancing to leadership roles.

**Commercial Skills:** Training will be provided to all staff and will focus on industry standards and recommendations. Training will include DMV standards, insurance and title updates, document retention and the loan process.

**Computer Skills:** Training will be provided to all staff and will focus heavily on upgrades to software. This will include the MegaTerm and Megalmage software updates. Training will also be provided for Administrative Staff in IT roles on technical network administration, network management, and programming to allow these staff to appropriately support the Company's software systems.

**Retrainee - Job Creation**

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

During the economic recession and following years, the Company was not able to hire new staff. As the economy recovered, the Company has seen increasing demand for loans. As a result, Reliant has implemented a growth strategy and expects an increase in revenue by up to 25%. Part of the increase is expected through an expansion in geographic areas it serves expanding business capacity to existing functions. In order to successfully grow, the Company
must add newly hired staff to assist with influx of new loans expected through the expansion. The Company plans to hire 10 new staff: five Operations Staff, a Technical Staff, two Administrative Support Staff and two Sales Staff. These new staff will allow the Company to meet the needs of its customers.

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.

**Commitment to Training**

Reliant is committed to training on an ongoing basis and has created a robust training program, Reliant University. This program has a structured curriculum and enabling the Company to develop employees and promote from within. The Company has found that the training program directly correlates to improved quality and efficiencies. Currently, the University offers training in goal setting, compliance, management and leadership skills, and cross training. The Company has found that economic realities have constrained the type and quantity of training it has been able to provide. ETP-funded training would assist the Company in providing additional training. ETP funds will not displace the existing financial commitment to training.

**Modification to Small Business Term Limit**

Reliant requests a two-year term to accommodate the busy season that it experiences annually. The industry is cyclical: most business is generated during the winter and spring and slows a bit during the summer and fall. Although the Company expects to train throughout the year, a two-year term will enable the Company to ramp up hours during the slower periods to maximize total training hours.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 60

Trainees may receive any of the following:

BUSINESS SKILLS
- Business Performance
- Project Management
- Communication Skills
- Customer Service
- Leadership Skills
- Sales Skills
- Decision Making
- Teambuilding
- Change Management
- Process & Performance Management
- Profit & Productivity Improvement
- Goal Setting

COMMERCIAL SKILLS
- Underwriting Guidelines
- Verification Guidelines
- Loan Processing
- Insurance and Titles Updates
- Accounting Skills
- Credit & Funding
- Consumer Financial Protection Bureau
- Document Audit
- Loan Disclosures & Retention
- Loan Decisions and Conditions
- Loan Products
- Privacy Standards
- Bankruptcy Standards
- DMV Titles
- Auto Insurance
- Auto Claims
- Fair Credit Reporting
- IT Networking
- Data Security
- Bank Reconciliation GAAP
- Data Analytics

COMPUTER SKILLS
- Internal Software Updates
- Payroll Updates
- DocuTech & Electronic Signatures
- Network Admin & Management
- Computer Programming

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
Retrainees - Job Creation
Training Proposal for:
Scott & Baldwin, CPAs, a Professional Corporation

Small Business
ET17-0390

Approval Date: January 24, 2017
ETP Regional Office: Sacramento Analyst: K. Smiley

CONTRACTOR

- Type of Industry: Financial Services
  Priority Industry: ☐ Yes ☑ No
- Number of Full-Time Employees
  California: 15
  Worldwide: 15
  Number to be trained: 20
  Owner ☑ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☑ No
- High Unemployment Area (HUA): ☐ Yes ☑ No
- Turnover Rate: 0%
- Repeat Contractor: ☐ Yes ☑ No

FUNDING

- Requested Amount: $22,880
- In-Kind Contribution: $26,961
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100</td>
<td>Business Skills, Computer Skills, Commercial Skills</td>
<td>15</td>
<td>8-60</td>
<td>$1,232</td>
<td>$18.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 56</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraine SB &lt;100</td>
<td>Business Skills, Computer Skills, Commercial Skills</td>
<td>5</td>
<td>8-60</td>
<td>$880</td>
<td>$21.63</td>
</tr>
<tr>
<td></td>
<td>Job Creation Initiative</td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #’s 1 and 2: $22 SB Non-Priority
- County(ies): Placer
- Occupations to be Trained: Office Staff, Accountant, Tax Lead, Partner
- Union Representation: Yes
- No
- Health Benefits: N/A

**SUBCONTRACTORS**

- Development Services: Propel Consulting Group of El Dorado Hills assisted with development for a flat fee of $1,716.
- Administrative Services: Propel Consulting Group will also provide administrative services for a fee not to exceed 7.5% of payment earned.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 1979 and located in Roseville, Scott & Baldwin, CPAs, a Professional Corporation (S&B) is an accounting firm that provides end-to-end accounting, tax and consulting services for corporations and not-for-profits businesses from a variety of industries. Services include financial statement audits, business valuations, cash flow projections and financial analysis reports.

**Need for Training**

S&B began offering a new service, CFO Service, in September of 2016 to smaller companies. This service offers instrumental financial advice to help grow and brand small companies. Offerings under this service include: recommending financial strategies to increase profits and net worth, installing new financial processes and metrics, leading a company’s growth or expansion, and providing upper management a deeper understanding of financial information.
and results. The CFO Service also includes helping small businesses implement accounting and financial reporting. All staff will receive training; however, Accounting Staff will be the main focus. The two company owners will also receive training.

Additionally, in January 2017, S&B will purchase and install new Contract Administration Software (CAS) at a cost of $60,000 to increase office efficiencies and enhance project management. CAS will house all contracts, allowing staff to easily find and manage contracts at all stages of development.

Retrainee - Job Creation

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

In October 2016, S&B purchased a new facility, approximately 7,000 square feet larger than the previous facility, and will hire new staff to support its CFO Service. The Company has committed to hiring five new employees, Accountants and Tax Leads (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 provided to all occupations specific to job duties to enhance customer satisfaction and project management. Courses will include Customer Service, Technical Understanding, Marketing Techniques and Project Management.

Commercial Skills: Training will be provided to all occupations to increase knowledge of services and operational efficiencies. Courses will include Accounting & Auditing Techniques, Estate & Trust Procedures, Proposal & Contract Agreement Procedures and Quality Control.

Computer Skills: Training will be provided to all occupations to increase understanding of internal software systems. Courses will include CAS, Lacerte, QuickBooks and Thomson Reuters Research Tools.

Commitment to Training

ETP funds will not displace their existing financial commitment to training. S&B provides annual training that includes new-hire orientation, staff development, and safety training.

- Training Infrastructure

S&B has a detailed training plan in place. The Company has assigned two staff members to monitor this project. Additionally, a subcontractor was retained to provide administrative services. S&B will use a combination of internal subject-matter experts and training vendors.

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 Service
- Communication Skills
- Presentation Skills
- Marketing Techniques
- Project Management
- Technical Understanding
- Conflict Resolution
- Source New Leads/Opportunities
- Teambuilding
- Maximizing Performance
- Leadership
- Delegating Projects

**COMMERCIAL SKILLS**
- Accounting & Auditing Techniques
- Tax Topic Updates
- Affordable Care Act Updates
- Generally Accepted Accounting Principles Updates
- Internal Revenue Code Updates
- General Ledger Accounting
- Tax Preparation Services and Techniques
- Financial Statement Preparation
- Estates & Trusts Procedures
- Fraud Detection/Analysis/Review
- Employer Benefit Plans
- Professional Networking Management
- Review Financial Statements & Tax Returns
- Accounting/Tax Research Techniques
- Proposal & Contract Agreement Procedures
- Quality Control

**COMPUTER SKILLS** (Intermediate/Advanced)
- Contract Administration Software
- Intermediate/Advanced Microsoft Office
- Adobe Office Suite
- Lacerte
- QuickBooks
- Practice CS
- Thomson Reuters Research Tools

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
Retrainee - Job Creation
Training Proposal for:

Silicon Microstructures, Inc.

Small Business

ET17-0358

Approval Date: December 14, 2016

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

CONTRACTOR

- Type of Industry: Manufacturing
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 75
  Worldwide: 75
  Number to be trained: 61
  Owner ☐ Yes ☒ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 8%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $95,160
- In-Kind Contribution: $171,990
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate SB &lt;100</td>
<td>Business Skills, Computer Skills, Mfg. Skills, HazMat, HAZWOPER, PL-Mfg. Skills</td>
<td>57</td>
<td>8 - 60 0</td>
<td>$1,560</td>
<td>$18.74</td>
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<td></td>
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<td>Weighted Avg: 60</td>
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<tr>
<td>2</td>
<td>Retrainee Job Creation Initiative Priority Rate SB &lt;100</td>
<td>Business Skills, Computer Skills, Mfg. Skills, HazMat, HAZWOPER, PL-Mfg. Skills</td>
<td>4</td>
<td>8 - 60 0</td>
<td>$1,560</td>
<td>$18.74</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #’s 1 and 2: $26 SB Priority
- County(ies): Santa Clara
- Occupations to be Trained: Administrative Staff, Buyer, Engineer, Finance Staff, Maintenance Technician, Manager, Operator, Sales Staff, and V.P.
- Union Representation: Yes
- Health Benefits: N/A

**SUBCONTRACTORS**
- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 1991 and located in Milpitas, Silicon Microstructures, Inc. (SMI) designs and manufactures pressure sensing solutions to serve the automotive, medical, industrial, aerospace and HVAC markets. SMI products can measure at ultra-low pressure ranges (< 2'' H2O) all the way to extremely high pressure ranges (> 40 Bar), all while being the smallest size for the respective sensitivity. Some of SMI’s customers are Volcano Corp., Honeywell, and Schrader International.

**Need for Training**

SMI is facing pricing and quality pressures from international competitors. To remain competitive and keep up with customer demand, SMI must be able to design and manufacture...
high quality products that are smaller, more accurate, and less hysteresis (shortcoming) at competitive price points. To this end, SMI has invested approximately $1 million on new test equipment and tools to be installed next year. The proposed training will enable SMI to upgrade employee skills; cross-train employees to promote an agile workforce; and implement process improvements to enhance productivity, improve efficiency, and eliminate waste.

Retrainees - Job Creation

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

The Company plans to expand existing business capacity by adding newly-hired employees to an existing function. The Company has committed to hiring four new employees (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the contract term. Trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Training will be provided through Class/Lab and E-Learning methodologies at the Milpitas facility by in-house subject matter experts and vendors if necessary. The Company has created a detailed training plan that will be implemented starting in January.

Business Skills: Training will be offered to all occupations. Topics include customer service excellence, product knowledge, decision making, and project management. Training is intended to improve customer service and operation efficiency.

Computer Skills: Training will be offered to Engineers, Buyers, Sales and Finance Staff to learn intermediate and advance tools in Excel, PowerPoint, and Salesforce to better manage electronic data.

Hazardous Materials: Training will be offered to Operators and Maintenance Technicians. Training aims to reduce injuries on the job by teaching safe handling, labeling, and disposing of hazardous materials.

Manufacturing Skills: Training will be offered to all occupations to enhance operation efficiencies and implement Lean Manufacturing. Training for Operators, Technicians, and Engineers will include ISO, product knowledge, and equipment operation to improve productivity and make manufacturing processes more efficient.

Productive Laboratory

SMI is requesting Productive Lab (PL) in Manufacturing Skills for up to 40 Operators, Technicians, and Engineers. SMI products are manufactured in a cleanroom environment and therefore, cannot be recreated in a Class/Lab environment. Trainee proficiency in each equipment/tool/process could take anywhere from 8 to 24 hours of training. PL training will be conducted under constant supervision, and trainers will certify a trainee’s competency prior to trainees’ independent work. The trainer-to-trainee ratio will be 1:1 with a per-trainee maximum of 24 PL hours.
Certified Safety Training

1. 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. Training will be offered to Maintenance Technicians, Operators, and Managers. 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.

RECOMMENDATION

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab & E-Learning Hours
8 - 60
Trainees may receive any of the following:

**BUSINESS SKILLS**
- Conflict Resolution
- Customer Service Excellence
- Decision Making
- Effective Leadership
- Product Knowledge
- Project Management
- Risk Management
- Strategic Planning
- Team Building
- Time Management

**COMPUTER SKILLS**
- Excel
- PowerPoint
- SAGE 100 (ERP)
- Salesforce

**HAZARDOUS MATERIALS**
- Hazardous Chemical Cleaning/Handling
- Hazardous Material Handling
- Hazardous Waste Cleaning

**HAZWOPER**
- Chemical Release Response
- Decontamination Operations
- Emergency Response (EAP)
- Fire Prevention Plan
- Fire Response
- Hazardous Waste
- Incident Commander
- PPE / Respiratory Fit Testing
- Regulatory Requirements
- Toxic Gas Alarm Response

**MANUFACTURING SKILLS**
- Equipment/Tools Operations
  - Bonding
  - Cleaning
  - Etching
  - Inspection
  - Litho
  - Oxidation
  - Sputter
  - Testing
- Inventory Control
• ISO/TS
  o 9000
  o 14000
  o 16949
• Manufacturing Execution Systems (MES) Training
• Product/Recipe Knowledge

**Productive Lab**
0 - 24

**MANUFACTURING SKILLS** (1:1 trainer-to-trainee ratio)
• Equipment/Tools Operations
• Bonding
• Cleaning
• Etching
• Inspection
• Litho
• Oxidation
• Sputter
• Testing
• Lean Manufacturing Processes
• Product/Recipe Knowledge

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. PL is capped at 24 hours per-trainee.
DELEGATION ORDER

Training Proposal for:
Simpson Strong-Tie Company Inc.

Agreement Number: ET17-0391

Approval Date: January 25, 2017

ETP Regional Office: San Diego       Analyst: M. Ray

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraineepriority rate</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Priority Industry: Yes No</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Riverside</th>
<th>Repeat Contractor:</th>
<th>Yes No</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Yes No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Yes No</th>
<th>Los Angeles Sheet, Metal, Air, Rail, and Transportation Local 170 and Communications Workers of America Local 9415</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 450</th>
<th>U.S.: 1,500</th>
<th>Worldwide: 2,000</th>
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</thead>
<tbody>
<tr>
<td>Turnover Rate:</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(% of total trainees)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$99,180</td>
<td>$0</td>
<td>$0</td>
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</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $104,690
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineep Priority Rate</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, OSHA 10/30, PL - Manufacturing Skills</td>
<td>95</td>
<td>8 - 200</td>
<td>$1,044</td>
<td>$16.16</td>
</tr>
</tbody>
</table>

Minimum Wage by County: $16.16 per hour 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 ☐

Up to $1.16 per hour may be used to meet the Post-Retention Wage.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Service/Sales</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Mechanic</td>
<td>5</td>
<td></td>
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<tr>
<td>Production</td>
<td>55</td>
<td></td>
</tr>
<tr>
<td>Engineering/Information Technology</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Finance</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

## INTRODUCTION

Founded in 1956, Simpson Strong-Tie Company Inc. (SST) ([www.strongtie.com](http://www.strongtie.com)), a subsidiary of Simpson Manufacturing Company, Inc., designs and manufactures a myriad of metal connectors, shearwall panels, as well as anchor and fastening systems for building construction to help increase the structural integrity of homes and buildings. Its product lines include Structural Connectors, Fasteners, Wood and Steel Strong-Wall® prefabricated shearwalls, Anchor Tiedown Systems (for multi-story buildings), Quik Drive® auto-feed screw driving systems, and Anchor Systems (for concrete and masonry). SST is an international supplier of structural building products to industrial, commercial, and residential construction industry.

SST employs more than 2,000 workers worldwide, including 450 in its three California facilities: headquarters in Pleasanton, and manufacturing facilities in Stockton and Riverside. All three locations have benefited from ETP funding in the past (see Prior Project Table).

This will be the second ETP Agreement at the Riverside facility in the last five years, for approximately 95 workers. Concurrently, SST is also submitting a separate funding proposal for
its Stockton facility. This is consistent with the Company’s administrative approach under its two recent projects (ET15-0330 and ET12-0150), to ensure internal control over tracking and documentation (see Prior Project table for ET12-0150). The combined requested funding does not exceed the amount the Company earned under the two most recent projects. In total, both current proposals are under the SEC cap of $425,000.

Prior Performance

In its first ETP project, the training plan included skills training for all three California facilities. Training focused on implementing new processes for die set-up used to manufacture the Company’s products as well as increased its development efforts for products used in Do-It-Yourself home improvement, multi-family residential, and some light commercial and industrial markets. Training also focused on innovative new products in green building technology.

In its two most recent projects, SST provided computer, continuous improvement, and manufacturing skills training to a total of 205 trainees (45 weighted average hours). Training supported the implementation of computerized modules on conveyors, robotic welders, auto presses, and forklifts at the Riverside plant which were driven by computer programs. Training also focused on implementation of new lateral system product which was designed to prevent structural damage during a seismic event.

PROJECT DETAILS

Company representatives report that there is a continued increase in customer demands for structural building products, at the rate of 10% in 2016 and a projected (additional) 10% in 2017. In order to keep up with this growth, SST Riverside has committed to more automation in equipment and systems. Specifically, the Company will be upgrading welding robots, automating three auto presses, and improving software systems used to manipulate this equipment.

SST Riverside recently invested $3.4M in other new machineries such as welding fixtures, material handling conveyors/robots, paint line equipment, and wall assembly conveyors and tools. The implementation of new equipment is scheduled for May 2017. Consequently, the Company has designed an extensive training program specifically to provide workers the knowledge and skills to successfully operate new machineries and implement respective computerized operational processes.

In addition, SST Riverside will roll out a comprehensive performance-based training program to formally address skill gaps, with performance assessment.

Training Plan

ETP training will begin upon approval and will be delivered by in-house trainers. Specialized training vendors may be retained during the contract term. Training will be delivered via class/lab and, for the first time in this project, via Productive Lab setting in the following:

Business Skills (5%) – Training will be offered to Customer Service/Sales Staff and Managers. Course topics include Business Strategies, Customer Service Skills, Leadership Skills, and Sales & Marketing Skills. Training will provide workers the skills necessary to provide exemplary customer service and support growth initiatives to successfully implement new and updated business processes.

Computer Skills (10%) – Training will be offered to all occupations. Training topics include applications skills in CAD/CAM, intermediate/advanced software systems and Microsoft Office Suite, and Proprietary Reporting & Support Systems, and Server & Hardware Configurations.
Training will allow workers to generate accurate and up-to-date reports and provide financial and operational visibility.

**Continuous Improvement** (20%) – Training will be offered to all occupations. Course topics such as Quality Concepts, Best Practices, ISO, High Performance Workplace Systems, and Lean Six Sigma will support the Company’s effort to eliminate wasteful activities within its manufacturing and business processes. All frontline workers will receive Decision Making & Problem Solving skills training to empower them to make decisions and take effective actions.

**Hazardous Materials** (5%) – Training will be provided to all occupations. Training in HazMat Handling will increase employee knowledge and skills on how to effectively handle all types of hazards within their working environment.

**Manufacturing Skills** (40%) – Training will be offered to all trainees to develop skills in all areas of production, processes, and procedures. Training topics include Advanced Techniques for new products, industries clients, & processes; Logistics Skills; Design & Engineering; Assembly Skills, Warehousing Skills; Production Skills; and Quality Control. A significant amount of training will focus on newly-acquired equipment and computerized modules to provide workers with knowledge and skills to operate equipment in start-up/installation and operating standards.

**OSHA 10/30** (5%)

OSHA 10/30 training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of training for frontline Production Staff and 30 hours for supervisors. Completion of the training results in a certificate that expands employment opportunities. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour or 30-hour course.

**Productive Laboratory – Manufacturing Skills** (15%)

The Panel has adopted regulations to authorize reimbursement for training delivered in a Productive Laboratory (PL) setting. PL trainees may produce goods for profit as part of the training, in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training, and special attendance rosters will be used to assist in monitoring.

SST requests PL training for approximately 66 Production Staff, Mechanics, Engineers, and Managers. Training topics include Steel Strong Walls, Material Handling Conveyor, Paint Line, Special Moment Frames, Manual Press Machines, Welding Robots, Automatic Press Machines, and Auto Punch and Cut Press. Trainees may receive all their training hours in PL-Manufacturing Skills (up to 40 hours) or a combination of class/lab including PL hours. Training will be specific to the type of equipment and/or process to ensure trainees receive a broader understanding of the entire manufacturing process.

PL trainers will be qualified, skilled, subject-matter experts, and/or machine-certified to instruct and deliver the course content and material. Trainers are responsible for directing the operations and instructions as well as to provide coaching, mentoring, evaluating, and critiquing trainees as work is performed.

SST also requests that the trainer-to-trainee ratio to vary between 1:1 and 1:3, depending on the type of equipment being used. Staff will benefit from being trained at the same time, rather than two or three repetitive sessions to keep trainer costs to a minimum. The 1:3 ratio for machinery training will also allow the Company to break down equipment once, rather than three times.
The Company anticipates a decrease in production on particular machinery or process during PL to allow trainees to learn the equipment and possibility of products with higher defect levels. This will allow trainees to acquire the skills to become competent in the operation of the equipment without the pressure of normal production requirements.

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. Its current annual training budget per facility is $50,000 for all training including new employee orientation; on-the-job manufacturing skills; management skills; safety, health, and environmental; clinical trials; forklift; basic computer skills; and any federal/state law mandated training.

Training Infrastructure

SST plans to contract with an administrative subcontractor to assist with ETP project administration. In addition, the Riverside facility has a designated staff member to oversee the training as well as collect and submit training rosters to the administrative subcontractor for data entry into the ETP systems.

Union Support

This proposal is supported by, and letters of support have been received by, the following:

1. Los Angeles Sheet Metal, Air, Rail, and Transportation Union Local 170 to train Production Staff; and
2. Communications Workers of America Local 9415 to train Mechanics.

Out-of-State Vendor

SST is requesting to use an out-of-state consultant, located in Suwanee, GA. This is Training Grants Intelligence, Inc. (TGII), which assisted in development at no cost. TGII administered the previous ETP projects.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0326</td>
<td>Riverside</td>
<td>12/1/14 – 11/30/16</td>
<td>$162,000</td>
<td>$162,000 (earned – in process)**</td>
</tr>
<tr>
<td>ET15-0330</td>
<td>Stockton</td>
<td>11/17/14 – 11/16/16</td>
<td>$161,250</td>
<td>$160,043 (99%)</td>
</tr>
<tr>
<td>ET12-0150</td>
<td>Pleasanton, Stockton, Brea, and Riverside</td>
<td>9/16/11 – 9/15/13</td>
<td>$80,910</td>
<td>$51,923 (65%)*</td>
</tr>
</tbody>
</table>
**ET15-0326: The last day of ETP training was 8/29/16. SST Riverside has documented 9,159 eligible training hours for 205 trainees who completed retention to earn 100% of the Agreement amount.

*ET12-0150: SST representatives reported that this Agreement was managed through the Pleasanton facility, and there was a lack of communication between the Pleasanton and Riverside staff. In addition, there were problems with overall recordkeeping. To address these administrative challenges, the Riverside and Stockton facilities requested separate ETP Agreements and training plans for ET15-0326. The improved performance under these ETP Agreements is illustrated above.

**DEVELOPMENT SERVICES

SST retained TGII in Suwanee, Georgia, to assist with development of this proposal at no charge.

**ADMINISTRATIVE SERVICES

TGII 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 Strategies
- Customer Service Skills
- Leadership Skills
- Sales & Marketing Skills

**COMPUTER SKILLS**
- Computer Aided Design/Computer Aided Manufacturing (CAD/CAM)
- Intermediate/Advanced Software Systems
- Intermediate/Advanced Microsoft Office Suite Applications
- Proprietary Reporting & Support Systems
- Server & Hardware Configurations

**CONTINUOUS IMPROVEMENT**
- Continuous Improvement Techniques
- Team Building
- Quality Concepts
- Frontline Decision Making & Problem Solving
- High Performance Workplace Systems
- Lean Six Sigma
- Best Practices
- ISO 9001:2008

**HAZARDOUS MATERIALS**
- Hazmat Handling

**MANUFACTURING SKILLS**
- Advanced Techniques for New Products, Industries Clients & Processes
- Logistics Skills
- Equipment Operation and Maintenance
- Design & Engineering
- Equipment Maintenance
- Assembly Skills
- Warehousing Skills
- Production Skills
- Quality Control

**OSHA 10 (Certified OSHA Instructor)**
- OSHA 10 (requires 10 hours completion)

**OSHA 30 (Certified OSHA Instructor)**
- OSHA 30 (requires 30 hours completion)

Safety Training will be limited to 10% of total training hours, per-trainee. This cap does not apply to OSHA 10/30.
PL Hours

0 – 40

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

- Steel Strong Walls
- Paint Line
- Material Handling Conveyor
- Special Moment Frames
- Manual Press Machines
- Welding Robots
- Automatic Press Machines
- Auto Punch and Cut Press

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 40 hours per-trainee.
September 20, 2016

Andre El-Khoury
Simpson Strong Tie
12246 Holly Street
Riverside, CA 92509

From: SMART Local Union 170

Dear Andre El-Khoury:

We are aware that employees of Simpson Strong Tie Company, Inc. 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 Simpson Strong Tie Company Inc. 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 Simpson Strong Tie Company Inc., 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 Local Union 170 office at (562) 695-4066.

Sincerely,

Ernesto Tolentino
Business Manager

cc: Mario Vega
Union Business Representative
September 20, 2016

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Simpson Strong Tie
12246 Holly Street
Riverside, CA 92509

From: SMART Local Union 170

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If you should have questions or concerns with regard to this letter of support, please contact our Local Union 170 office at (562) 695-4066.

Sincerely,

Ernesto Tolentino
Business Manager

cc: Mario Vega
Union Business Representative
### Training Proposal for:
Spooner's Woodworks, Inc.

**Small Business**

**ET17-0388**

**Approval Date:** December 20, 2016

**ETP Regional Office:** San Diego  
**Analyst:** J. Davey

#### CONTRACTOR

- **Type of Industry:** Manufacturing
- **Priority Industry:** ☑ Yes ☐ No
- **Number of Full-Time Employees**
  - California: 93
  - Worldwide: 93
  - Number to be trained: 64
  - Owner ☑ Yes ☐ No
- **Out-of-State Competition:** NAICS Code Eligible
- **Special Employment Training (SET):** ☑ Yes ☐ No
- **High Unemployment Area (HUA):** ☑ Yes ☐ No
- **Turnover Rate:** 2%
- **Repeat Contractor:** ☐ Yes ☑ No

#### FUNDING

- **Requested Amount:** $71,552
- **In-Kind Contribution:** $66,130
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority Rate SB &lt;100</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills, OSHA 30</td>
<td>64</td>
<td>8-120</td>
<td>0</td>
<td>$1,118</td>
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</table>

- **Reimbursement Rate:** Job #1: $26 SB Priority
- **County(ies):** San Diego
- **Occupations to be Trained:** Administrative Staff, Delivery Staff, Engineering Staff, Installation Staff, Managers, Owners, Production Staff, Project Management Staff, Purchasing, Sales & Estimating Staff
- **Union Representation:** Yes
- **Health Benefits:** N/A

SUBCONTRACTORS

- **Development Services:** California Manufacturing Technology Consulting (CMTC) in Torrance assisted with development of this proposal. Note: CMTC is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP, not to exceed $15,000. In this proposal, no fee has been charged.
- **Administrative Services:** CMTC 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

OVERVIEW

Established in 1980 and located in Poway, Spooner's Woodworks, Inc. (Spooner's) is a family owned and operated business that specializes in high-end millwork and production casework.
The Company takes on projects of any size and scope, with a focus on tenant improvements, education, military, public works, medical, and hospitality.

Spooner’s is eligible for standard retraining and priority-industry rate funding under the Out-of-State Competition Provisions for industrially-classified manufacturers retraining current employees.

The Company is currently undergoing an ownership succession as the day-to-day management of the business transitions to the next generation. The new owners are trying to evolve the company by introducing new technology and equipment, responding to customer demands to reduce costs while maintaining high-quality, streamlining operations and leveraging underutilized capacity.

The Company recently purchased MicroVellum software, an AutoCAD-based application used by wood product manufacturers that design and manufacture residential cabinetry, commercial casework, closets, fixtures, retail environments, and architectural millwork. The Company will need extensive training to fully implement this new equipment.

Education and military customers make up a significant portion of Spooner’s customer base. These entities have strict quality and documentation requirements. To meet these requirements, the Company will provide Lean Manufacturing and Production Process Improvement skills.

The Company recently moved to a larger, 60,000 square foot, state-of-the-art, facility and, with the extra capacity, it must organize the new space to maximum advantage. Designing a production layout that maximizes efficiency will improve profitability and on-time delivery. The goal is to better leverage the Company’s capabilities in order to support and grow the business, provide for a stable retirement for the original owners, and provide a quality standard of living for the new owners and the workforce as a whole.

**Modifications**

Spooner’s requests an increase in the small business maximum range of hours from 60 to 120. The Company reports that 11 Engineers, Managers, and a small selection of trainees from other occupations will need between 100 to 120 hours of training. Engineers and select Managers will be responsible for learning how to utilize the new MicroVellum software, which will require 60 hours of training.

Spooner’s is confident that its training plan targets a reasonable number of hours both overall and within each occupation. It does, however, have 11 key employees that will have a major role in the success of its strategic training initiatives and, as such, will require more intensive training. While most employees will receive an average of 2-8 hours of training per month, these key individuals are targeted for 10-16 training hours per month.

Engineers, Managers and select staff across all other occupations will be leading the Company’s continuous improvement efforts and will be involved in leadership, lean and six sigma training. These subject areas will require 40 to 80 hours of training, depending on each employee’s level of involvement in these efforts. Employees involved in both of these training areas will exceed the 60-hour cap and may require up to 120 hours of training in order to fully learn the skills in the proposed training.
Request for a 2-year Agreement term:

In conjunction with the increase in the maximum range of hours, Spooner’s is also requesting a 2-year Agreement term rather than the standard 1-year term for Small Business projects. While Spooner’s fully intends to conduct all training within a 1-year term, the Company requests a 2-year term to allow for unexpected business conditions that may delay the delivery of training.

Training Plan

Training will be provided at its Poway facility by a combination of internal trainers and vendors. Training in Lean principles is the overarching methodology driving the training initiative.

Business Skills: This training will be delivered to select workers in all occupations to provide the skills to effectively interact with internal and external customers and to better assess and meet customer expectations. Sales staff will receive sales training to build skills in identifying opportunities to increase sales.

Computer Skills: This training will be delivered to all occupations to ensure that workers possess the skills to effectively utilize the ERP system and improve operational effectiveness. Select Engineering, Production and Management Staff will receive training in CAD/CAM and in the Microvellum software to gain the technical knowledge to fulfill their job duties and meet rigorous customer and industry requirements.

Continuous Improvement: This training will be delivered to select employees in all occupations to improve efficiencies and operations through implementing lean and Six Sigma. Leadership Skills will be delivered to both formal and informal leaders in all occupations to ensure they possess the skills to drive the Company’s continuous improvement initiative.

Manufacturing Skills: This training will be delivered to select Management, Production, Engineering and Project Management Staff to provide the skills to better manage production processes, tackle supply chain issues and better manage document control issues. With government entities comprising a significant portion of its customer base, employees must be proficient in all of these areas to meet stringent customer requirements as well as ensure best use of time and resources.

Certified Safety Training

OSHA 30. This training will be provided to select Managers and Production Staff with the goal of giving Managers the knowledge to maintain a safe work environment and showing Production Staff how they can be actively involved in reducing injuries on the job.

This training is a series of courses “bundled” by industry sector and occupation. It consists of 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.

RECOMMENDATION

Staff recommends approval of this proposal.
**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8 – 120  
Trainees may receive any of the following:

**BUSINESS SKILLS**
- Marketing & Sales
- Customer Service

**COMPUTER SKILLS**
- Enterprise Resource Planning
- Microvellum
- CAD/CAM

**CONTINUOUS IMPROVEMENT SKILLS**
- LEAN/Six Sigma
- Leadership Skills
- Production Process Improvement

**MANUFACTURING SKILLS**
- Document Control
- Operational Management
- Supply Chain Management

**OSHA 30**
- OSHA 30

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

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**Note:** Reimbursement for retraining is capped at 120 total hours per-trainee, regardless of method of delivery.
# DELEGATION ORDER

## RETRAINEE - JOB CREATION

**Training Proposal for:**

**Sukut Construction Inc.**

**Agreement Number:** ET17-0403

**Approval Date:** January 25, 2017

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

## PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>SET Priority Rate Retraineer Job Creation Initiative</th>
<th>Industry Sector(s):</th>
<th>Construction Engineering</th>
</tr>
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<tbody>
<tr>
<td>Counties Served:</td>
<td>Orange</td>
<td>Repeat Contractor:</td>
<td>☑ Yes ☐ No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>☑ Yes ☐ No International Union of Operating Engineers, Local 12, Southern California District Council of Laborers, Local 652</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 500</th>
<th>U.S.: 500</th>
<th>Worldwide: 500</th>
</tr>
</thead>
</table>

| Turnover Rate:          | 5%      |
| Managars/Supervisors:   | N/A     |

## FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>= Total ETP Funding</th>
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</thead>
<tbody>
<tr>
<td>$69,888</td>
<td>$0</td>
<td>$0</td>
<td>$69,888</td>
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</table>

<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
<th>100% of Total ETP Funding Required</th>
<th>$143,714</th>
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TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainees</td>
<td>Business Skills, Commercial Skills, Computer Skills, OSHA 10/30, HazMat, Hazwoper</td>
<td>134</td>
<td>8 - 200</td>
<td>0</td>
<td>$432</td>
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<tr>
<td></td>
<td></td>
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<td></td>
<td>Weighted Avg: 24</td>
<td>$22.04</td>
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<td>2</td>
<td>Retrainees</td>
<td>Business Skills, Commercial Skills, Computer Skills, OSHA 10/30, HazMat, Hazwoper</td>
<td>10</td>
<td>8 - 200</td>
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<td>$1,200</td>
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<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td>$19.52</td>
</tr>
</tbody>
</table>

Minimum Wage by County: SET Modified Statewide $22.04 for Job Number 1 and $14.35 for Job Number 2

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 $2.52 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOB NUMBER 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engineering I</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Engineering II</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Administration I</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>Administration II</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Field Operations I</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Field Operations II</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>JOB NUMBER 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration I</td>
<td>4</td>
<td></td>
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<tr>
<td>Engineering I</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Engineering II</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1968 and located in Santa Ana, Sukut Construction, Inc. (Sukut) is a civil engineering contractor providing a wide range of engineering and construction services. Projects include: dam, levee, reservoir, pond and lake construction. Services include soil
engineering and earthwork logistics for mining and quarries; slope stabilizing and reinforcement; wall construction, shoring, mass excavation, and finish grading.

Sukut is eligible for ETP funding under SET provisions for priority workers. Under SET, the participating employer is not required to demonstrate out-of-state competition, however all trainees must be frontline workers. [Note: Although the Wage Range by Occupation table shows Level II trainees, they are still frontline workers as defined in T.22 CCR Section 4400 (ee).] To qualify under SET, trainees under this priority project must be earning at least the modified statewide average hourly wage at the end of the retention period.

This will be the Company’s third ETP-funded project, and the third within the last 5 years. The first project (ET13-0110) focused on process improvement, teambuilding, and project management. As a result, Sukut’s employees were better equipped to identify and meet customer expectations. The second project (ET15-0153) focused heavily on new software systems (Viewpoint) and leadership development. This training allowed the Company to implement a comprehensive leadership program which has given employees increased skills in communication, customer service, and cost reporting.

**PROJECT DETAILS**

New construction has seen continual growth in the last few years, which has resulted in increased market share for Sukut. The Company has set an aggressive goal to increase revenues of up to 50% by 2018, and an additional 25% by 2020. To achieve this goal, the Company is looking to expand to markets outside of California such as Virginia, North Carolina and Guam. As the Company takes on new and different geographical markets, training will become even more critical.

Additionally, the Company is diversifying services, and expanding into the alternative energy market. This expansion was planned during the last ETP funded project (ET15-0153) but is only now being implemented. For example, the Company is performing pile driving for solar projects. The management of alternative energy projects requires training in technical skills.

The Company’s projected growth means senior employees will be deployed to new, complex projects. The remaining workforce must be trained to fill in the gaps. Sukut will continue to deliver training on its internal ERP system, Viewpoint. This system launched under the last ETP project; however the software is constantly updated.

Training topics delivered in the prior ETP Agreements will only be delivered to those trainees who did not participate in the first two Agreements.

**Retraine e - Job Creation**

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

The Company projects to hire 25 new staff during the term of the Agreement as a part of the Company’s growth strategy and market diversification. Of those 25, Sukut has committed to hiring 10 “net 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 Plan

Training will be provided at the Company’s Santa Ana location and will be performed by in-house trainers and vendors to be determined.

**Business Skills (25%)**: This training will be provided to all occupations focusing on communication and leadership skills, coaching, problem solving and decision making. Training will also include business writing, contractor negotiations as well as change management and successful resolution of issues arising during transition from the preconstruction to the construction phase.

**Commercial Skills (30%)**: This training will be provided to all occupations, focusing primarily on Engineering and Field Operations. Training will focus on best practices and knowledge transfer and will include specific filed operations topics such as running hauls and pile driving. Engineers will focus on the job costing, estimating and project tracking. Additionally, training for engineers and field operations will incorporate new environmental topics such as soils and geology to ensure Sukut is compliant with environmental regulations. Administrative Staff will focus on skills required to support field staff such as job costing, estimating and tracking.

**Computer Skills (30%)**: Training will be provided to all occupations. Training will be provided on Sukut’s ERP system and Job Costing software (Track). Specifically, Engineers will learn new updated CAD software. Administrative Staff will be trained in updates to work benefits administration software (Plansource) and workflow and forms management system (Docusign).

**Certified Safety Training (15%)**: Sukut will be providing OSHA10/30, HAZWOPER and HAZMAT training for its Engineers and Field Operations Staff.

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 also 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.

3. **Hazardous Materials (HAZMAT).** This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, field operations and engineers will receive up to 40 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.
Union Support

Staff in Field Operations I & II is represented by the Southern California District Council of Laborers Local 652 or the International Union of Operating Engineers, Local 12. Representation depends on each trainee’s occupational title in the area of Field Operations. Letters of support have been provided and are on file with ETP.

Priority Industry Wage Modification

For trainees employed in a priority industry, the Panel may modify the SET Wage up to 25% below the statewide average hourly wage. Sukut requests the wage modification from $29.38 to $22.04 for trainees in Job Number 1.

Temporary to Permanent Hiring

Sukut intends to train 10 workers in Job Number 2 (Job Creation) under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to Sukut, the average time for “converting” temporary workers into full-time permanent employment is 90 days. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled as trainees until after they have been hired by Sukut 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.

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 spends approximately $200,000 annually for training in California in topics such as new hire orientation, sexual harassment prevention and on-the-job training.

Training Infrastructure

Training will be administered by Sukut’s Human Resources Department. The HR Manager will schedule training in coordination with department leads and will work in partnership with the Company’s operations team to ensure that trainees are released from work to attend training. The HR department will ensure that training is properly captured and documented. Sukut has also retained a subcontractor to help with ETP administration.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Sukut under an ETP Agreement that was completed within the last five years:
<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0153</td>
<td>Santa Ana</td>
<td>10/7/14 – 10/6/16</td>
<td>$55,760</td>
<td>$52,305</td>
<td>94%</td>
</tr>
<tr>
<td>ET13-0110</td>
<td>Santa Ana</td>
<td>7/26/12 – 7/25/14</td>
<td>$27,000</td>
<td>$27,000</td>
<td>100%</td>
</tr>
</tbody>
</table>

**DEVELOPMENT SERVICES**

Sukut retained Training Funding Source in Seal Beach to assist with development of this proposal for a flat fee of $3,900.

**ADMINISTRATIVE SERVICES**

Training Funding Source 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**
- Building Relationships
- Business/Technical Writing
- Change Management
- Coaching/Mentoring
- Communication Skills
- Conflict Resolution
- Contract Negotiation
- Delivering Feedback
- Goal Setting
- Leadership Skills
- Problem Solving/Decision Making
- Risk Management
- Team Building

**COMMERCIAL SKILLS**
- Bidding
- Estimating
- Budget/Cost Management
- Construction Procedures
- Finance & Accounting Procedures
- Field Earthwork Operations
- Field Solar Operations
- Claims management
- Subcontractor Management
- Concrete Structures
- Contract Review
- Change Management
- Earthwork Engineering
- Environment Policies
- Environmental/HDPE Liner
- Equipment Utilization
- GPS Technology
- Job Close-Out
- Project Review
- Project Walk-Through
- Pre-Con/Hand-off
- Soils/Geology
- Quality Control
- Rock Blasting/Excavation
- Scheduling/Managing CPM
- Take-Offs
- Running Hauls
- Job Costing
- Value Engineering
- Subcontractor Analysis
- Understanding Production Goals
- Value Engineering
- Wet Utilities
- RFI’s/Submittals

**COMPUTER SKILLS**
- Bid2Win (Estimating Software)
- Civil 3D
- AutoCAD
- MS Office
- MS Project
- Bluebeam
- Track
- Viewpoint
- Jobscore
- Plansource
- Docusign
- Allied
- Dispatch
- PSI

**OSHA 10/30** (Certified OSHA Instructor)
- OSHA 10 (requires 10hrs completion)
- OSHA 30 (requires 30hrs completion)

**HAZARDOUS MATERIALS**
- Hazardous Material Handling

**HAZWOPER**

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.
October 21, 2016

Ms. Jill McAloon, Acting Executive Director
The Employment Training Panel
1100 J Street, Fourth Floor
Sacramento, California 95814

Re: Union Support for ETP Funding
Sukut Construction

Dear Ms. McAloon:

This letter is to confirm support by the International Union of Operating Engineers, Local Union No. 12 for Sukut Construction proposed training to be submitted to Employment Training Panel.

Sincerely,

Ronald J. Sikorski, Business Manager
I.U.O.E., Local Union No. 12 and
General Vice President

RJS:ks
October 18, 2016

To Whom It May Concern:

“This letter is to confirm support by Laborers Union for Sukut Construction proposed training to be submitted to the Employment Training Panel.”

Respectfully,

Benito Robles
Field Representative
DELEGATION ORDER

Retrainee – Job Creation
Training Proposal for:
Sunvair, Inc.

Small Business

ET17-0329

Approval Date: December 7, 2016
ETP Regional Office: North Hollywood Analyst: M. Webb

CONTRACTOR

- Type of Industry: Manufacturing
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 75
  Worldwide: 112
  Number to be trained: 73
  Owner ☐ Yes ☒ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 15%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $75,920
- In-Kind Contribution: $70,350
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Priority Rate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SB &lt;100</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainees</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills</td>
<td>10</td>
<td>8-120 0</td>
<td>$1,040</td>
<td>*$13.73</td>
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<tr>
<td></td>
<td>Job Creation</td>
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<tr>
<td></td>
<td>SB &lt;100</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

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 SB Priority

- **County(ies):**
  - Los Angeles

- **Occupations to be Trained:**
  - Administration Staff, Customer Service Staff, Managers, Production Staff, Quality/Impection Staff

- **Union Representation:**
  - ☐ Yes
  - ☒ No

- **Health Benefits:**
  - Job #1: $2.93 per hour  Job #2: $0.87 per hour

### SUBCONTRACTORS

- **Development Services:**
  - California Manufacturing Technology Consulting (CMTC) of Torrance assisted with development at no cost. CMTC is eligible to receive 10% of the approved amount of funding for referrals such as this, under a marketing agreement with ETP

- **Administrative Services:**
  - CMTC will also perform administrative services for a fee not to exceed 13% of payment earned.

- **Training Vendors:**
  - N/A

### OVERVIEW

Founded in 1955, Sunvair, Inc. (Sunvair) (www.sunvair.com) manufactures, overhauls, and repairs aircraft landing gear. The overhauling process includes inspection, machining, plating,
painting, non-destructive testing and repair. Currently, Sunvair’s core business is overhauling and repair of aircraft landing gears for Boeing, Airbus and Lockheed Martin. Additional clientele includes Alaska Airlines, Hawaiian Airlines, Allegiant Airlines and Southwest Airlines. This will be Sunvair’s first ETP Agreement.

In 2016, Sunvair relocated from a 40,000 square foot building to a 77,000 square foot building in Valencia. Expansion efforts include a new plating facility located inside of the building. Due to massive growth in capacity, Sunvair will hire 10 to 15 new employees to staff the plating and production areas under this Agreement (See Job Creation). Furthermore, the Company conducted an in-depth assessment, leading it to a stronger training commitment to improve staff technical skills and meet company initiatives.

Competition in this industry continues to increase with additional competitors both inside and outside the U.S. Airlines have also increased competition by expanding their internal service capabilities. As a result, airlines no longer require repair for existing business and overhaul services of a third party vendor such as Sunvair. In an effort to remain competitive, Sunvair has developed a training plan to provide quicker turnaround times and lower costs. Training provided will ensure Sunvair initiatives are met (Customer Satisfaction), and help the Company operate at full capacity.

Curriculum topics will focus on worker technical skills to increase efficiency, improve operating processes, and meet customer demand. Topics such as Production and Inventory Management and Lean Manufacturing will improve employee job performance. Computer Skills training will increase staff’s ability to complete job duties utilizing the Company’s ERP System (Quantum Software) and become familiar with software programs used daily.

In the past, Sunvair outsourced all plating services. This service will now be conducted in-house using state-of-the-art chrome nickel and cadmium metal finishing. Employees will receive Manufacturing Skills training to operate equipment, learn chemical compositions, and utilize equipment to deliver customer specifications and properly plate products assembled and repaired.

Training Plan

**Business Skills:** Training will be offered to Customer Service Staff to improve customer service skills and meet customer expectations. Training will ensure staff is able to communicate effectively and recognize customer needs.

**Management Skills:** Training will be offered to Managers to improve leadership skills on the shop floor. Training includes new techniques and planning efforts.

**Computer Skills:** Training will be offered to all occupations to ensure workers can utilize computer software programs effectively.

**Manufacturing Skills:** Training will be offered to Production Staff and Managers to increase employee skills and improve operating processes. Training topics include Machining, Inspection, Shipping, Plating and Disassembly.

**Continuous Improvement:** Training will be offered to all occupations to implement Lean manufacturing processes and ensure quality standards are met. Topics include Problem Solving, Lean Manufacturing and Quality Systems.
**Productive Laboratory**

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

Aircraft landing gear is overhauled in accordance with the manufacturer’s maintenance manual instructions (primarily Boeing). All repair and assembly requirements differ and are dependent on the products make and model. However, the manufacturer’s manuals do not cover all repair procedures that may be required for the landing gear. As experts, Sunvair must submit engineering evaluations to the customer for review and approval by their Engineering Staff. As a result, employees are required to complete between 16 to 40 hours of PL training on repair, assembly, testing, machining and inspection (FAA requirement).

During PL training, workers will perform the following: 1) Setup, 2) Operation of machinery 3) Maintenance 4) Cleanup of parts and equipment and 5) Testing and Inspection. Clean up and inspection will entail one to two hours, and setup, operation, and maintenance will require approximately four to six hours each.

Trainers will examine and review work performed by staff to determine if the trainee can independently complete job duties as assigned. Training will be conducted in small groups with a 1:3 trainer-to-trainee ratio not to exceed 40 PL hours per trainee. A ratio of 1:3 will add to the efficiency of improved operating processes for 20 Production and Quality/Inspection Staff.

**Retraineer - 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.

Sunvair has committed to hiring 10 new employees (Job Number 2). Newly hired workers will receive training to increase knowledge and skills required to perform work tasks in line with Sunvair and customer requirements. Sunvair has established a new plating facility at the new location and require training for new employees in techniques such as machining, plating, painting and equipment operation.

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 Hour Limitation**

Retraining hours for small businesses are capped at 60 hours per-trainee. However, Sunvair is asking for a modification of the cap. A substantial amount of training has been identified for 12 Managers, Production and Quality/Inspection Staff. Training hours for these workers will exceed the small business cap of 60 total hours. These workers will be included in the roll out of lean and continuous improvement efforts, which have six training modules that range from 8 to 40 hours each. Trainees may receive up to 100 hours of Lean and continuous improvement training, with approximately 24 hours of Computer Skills training. To remain competitive with larger businesses and maximize training opportunities, Sunvair requests approval to train employees of a maximum of 120 training hours, per trainee.
RECOMMENDATION

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-120 Trainees may receive any of the following:

BUSINESS SKILLS
- Providing Quality Customer Service

COMPUTER SKILLS
- MS Office
- ERP System: Quantum Software

CONTINUOUS IMPROVEMENT
- Teams and Team Building
- Problem Solving
- Leadership
- Lean Manufacturing
- Supply Chain Optimization
- Production and Inventory Management
- ISO 9000 2015 Standards
- Quality Systems

MANAGEMENT SKILLS (Managers Only)
- Management/Supervisory Skills
- Strategic Planning and Policy Deployment

MANUFACTURING SKILLS
- Metaling Finishing
- Machining
- Deburring
- Painting
- Disassembly
- Inspection
- Blueprint Reading
- Geometric Dimensioning & Tolerancing
- Shipping
- Non-Destructive Testing
- Plating

Productive Lab

0-40

MANUFACTURING SKILLS (Ratio 1:3)
- Metaling Finishing
- Machining
- Deburring
- Painting
- Disassembly
- Inspection
- Blueprint Reading
- Geometric Dimensioning & Tolerancing
- Shipping
- Non-Destructive Testing
- Plating

Note: Reimbursement for retraining is capped at 120 total hours per-trainee in Job Numbers 1 and 2, regardless of method of delivery. PL is capped at 40 hours per-trainee.
Training Proposal for:
SYSCO Riverside, Inc.

Agreement Number: ET17-0347

Approval Date: December 9, 2016

ETP Regional Office: San Diego  Analyst: K. Campion

<table>
<thead>
<tr>
<th>PROJECT PROFILE</th>
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<tbody>
<tr>
<td>Contract Attributes:</td>
</tr>
<tr>
<td>Counties Served:</td>
</tr>
<tr>
<td>Union(s):</td>
</tr>
<tr>
<td>Number of Employees in:</td>
</tr>
<tr>
<td>Turnover Rate:</td>
</tr>
<tr>
<td>Managers/Supervisors: (% of total trainees)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FUNDING DETAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Costs - (Substantial Contribution) = (High Earner Reduction) = Total ETP Funding</td>
</tr>
<tr>
<td>$80,850 - $0 = $0</td>
</tr>
<tr>
<td>$80,850</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $226,800
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineet SET</td>
<td>Business Skills, Continuous Impr., Computer Skills</td>
<td>70</td>
<td>8 - 200</td>
<td>77</td>
<td>$1,155</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $28.37 per hour 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

Health benefits of up to $4.35 per hour may be used to meet the Post-Retention Wage.

*Commission Income:* Additionally, some trainees may also use commissions paid of up to $4.50 per hour to meet the Post-Retention Wage.

*The Company is not in Retail Trade. As such, occupations paid by commission do not fall under the Panel’s “Lowest priority” for FY 2016/17.*

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales/Marketing Associate</td>
<td>70</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

SYSCO Riverside, Inc. (SYSCO Riverside) warehouses and distributes more than 12,000 food products including fresh and frozen meats, seafood, prepared entrees, produce, desserts, dried foods, beverages, paper cleaning items, china, silverware and restaurant equipment throughout Riverside County and neighboring areas. The Company’s customer base includes restaurants, major hotels, hospitals, schools, assisted living facilities and government facilities. The Company is a wholly-owned subsidiary of SYSCO Corporation, located in Houston, Texas (www.sysco.com).

**Other SYSCO Proposals**

For FY2016/2017, the Panel has approved five additional SYSCO proposals, each wholly-owned and operated subsidiaries in California. At this time, no other SYSCO proposals are planned to be presented this fiscal year.

**15% Reduction**

Per the Panel’s direction at its August 24, 2016 Panel Meeting, a 15% reduction for all SYSCO projects has been applied across all occupations/Job Numbers. As such, under this proposal, the original requested amount of $94,500 was reduced accordingly to $80,850.

**PROJECT DETAILS**

This will be SYSCO Riverside’s second ETP Agreement. During the prior ETP Agreement, the Riverside facility had recently opened (2013) and training focused on 235 newly-hired Job
Creation staff, providing workers with the skills needed to achieve overall company business and sales goals. Some courses in the current Curriculum are repeated from the prior project Curriculum; however, the courses have been upgraded. Trainees will not receive duplicate training.

SYSCO Riverside aims to be the most valued and trusted business partner for its 4,500 customers across Southern California. To reach this goal, the Company must find ways to reduce costs, improve customer satisfaction, and increase sales. Sales/Marketing Associates must be trained to transition from “order takers” to “professional consultants.”

The need for training is also driven by new internet technology solutions and applications that have recently been implemented including Ecommerce, SYSCO Market, SYSCO Mobile and a new Pricing Management Tool. These applications will allow customers more flexibility in placing orders on-line and increase profitability and customer satisfaction. Growth is dependent on the success of the transition to this new technological environment.

Training Plan

In-house trainers will deliver all class/lab training.

**Business Skills** (60%) – Trainees will learn new selling skills, the Art of Communications, Menu Engineering, Analysis and Design, and how to consult with customers. These new skills will help Sales/Marketing Associates provide customers with innovative solutions to reduce expenses and help customers market their businesses more effectively.

**Continuous Improvement** (30%) – This training covers topics such as Building Values & Margin, Inventory Management, Flights to Success, SYSCO Test Kitchen Skills, and Advanced Marketing Associate Development. Trainees will learn quality concept techniques and how to apply them to produce quality products, strengthen workflow processes, and increase efficiency in the workplace. Training will reduce waste, streamline processes, improve quality, and lower costs.

**Computer Skills** (10%) – Sales/Marketing Associates will be trained on SYSCO Market Express, SYSCO Market Mobile, a new Pricing Management Tool, Ecommerce Application Skills and Web Solar Application skills.

**Commissions**

Commissions of up to $4.50 per hour may be added to the base wage for Marketing Associates to meet the SET Statewide Average Hourly Wage of $28.37 per hour. Marketing Associates sell products and services in the wholesale marketplace, which is different from Retail Trade. As such, occupations paid by commission qualify for ETP funding as they do not fall under the Panel’s “lowest priority” for FY 2016/17.

**Substantial Contribution**

SYSCO Riverside has not earned more than $250,000 for incumbent workers at its facility under the prior Agreement, therefore, there is no Substantial Contribution requirement for this project.

**SET**

SYSCO Riverside is eligible for ETP funding under SET provisions for front line workers. Under SET, the employer is not required to demonstrate out-of-state competition. To qualify under
SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.

**Commitment to Training**

The Company spends approximately $150,000 per year for new-hire orientation, OSHA-mandated training, ethics, workplace harassment prevention, antitrust, SYSCO code of conflict, test kitchen basics, fundamental selling skills, food safety, defensive driving, SYSCO Account Management System, sexual harassment prevention, on-the-job training and other basic job skills 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 Company's Director of Training and Development will oversee training implementation and will be assisted by an HR Coordinator. The Company has one primary in-house instructor dedicated to lead training with an additional 12-15 subject-matter experts who will conduct training.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
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<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0125</td>
<td>Riverside</td>
<td>09/02/2013–09/01/2015</td>
<td>$185,400</td>
<td>$128,884</td>
<td>(70%)</td>
</tr>
</tbody>
</table>

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Partnership Selling
- Consultative Selling
- Advanced Selling Skills Development
- Menu Engineering, Analysis & Professional Design
- Opportunity Feeder –Profit Optimizer
- Red Alert Customer Retention Tool
- The Art of Communications 100, 200, 300, 400
- Beyond Customer Service
- Selling Sysco Brand
- Leveraging Your Resources
- Business Review

CONTINUOUS IMPROVEMENT

- Building Value & Margin
- Category Management Optimizer
- Sysco Test Kitchen Skills
- Go Beyond Food
- Inventory Management
- Food Service Math
- Flights to Success
- Extended/Advanced Marketing Associate Development

COMPUTER SKILLS

- Web Solar Application Skills
- Proxy Management Application Skills
- Pricing Management Tool Application Skills
- On Demand Menu Tool Application Skills
- My Sysco Truck Application Skills
- Sysco Mobile Application Skills
- Sysco Market Express Application Skills
- E-Commerce Application Skills
- Advanced Customer Relationship Management Application 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:
The Conrad Corporation dba Conquest Imaging
Small Business
ET17-0355

Approval Date: December 14, 2016
ETP Regional Office: Sacramento Analyst: K. Mam

CONTRACTOR

- Type of Industry: Manufacturing
  Priority Industry: Yes  No
- Number of Full-Time Employees
  California: 40
  Worldwide: 44
  Number to be trained: 41
  Owner Yes  No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): Yes  No
- High Unemployment Area (HUA): Yes  No
- Turnover Rate: 16%
- Repeat Contractor: Yes  No

FUNDING

- Requested Amount: $63,960
- In-Kind Contribution: $68,417
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate SB &lt;100 HUA</td>
<td>Business Skills, Computer Skills, Continuous Impr, Mfg Skills, PL-Mfg Skills</td>
<td>34</td>
<td>8-60 0</td>
<td>$1,560</td>
<td>$15.60</td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Priority Rate Job Creation Initiative SB &lt;100</td>
<td>Business Skills, Computer Skills, Continuous Impr, Mfg Skills, PL-Mfg Skills</td>
<td>1</td>
<td>8-60 0</td>
<td>$1,560</td>
<td>$20.00</td>
</tr>
<tr>
<td>3</td>
<td>Retrainee Priority Rate SB&lt;100 Veterans</td>
<td>Business Skills, Computer Skills, Continuous Impr, Mfg Skills, PL-Mfg Skills</td>
<td>6</td>
<td>8-60 0</td>
<td>$1,560</td>
<td>$15.60</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #’s 1-3: $26 SB Priority
- County: San Joaquin
- Occupations to be Trained: Accounting Staff, Outside Sales Staff, Inside Sales Staff, Technical Training Staff, Operations Agent, Field Service Engineer, Research & Development Staff, Equipment Repairer Engineer, Quality/ISO Agent, Information Technology Agent, Human Resource Staff, Administrative Staff, Inventory Agent, Project Management Staff

- Union Representation: Yes
- Health Benefits: Job #’s 1 and 2: $0.60 per hour

### SUBCONTRACTORS
- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined
OVERVIEW

Founded in 2000 and headquartered in Stockton, the Conrad Corporation dba Conquest Imaging (Conquest Imaging) (www.conquestimaging.com) is a total ultrasound solution for health care providers. The Company offers fully reconditioned ultrasound systems from manufacturers like General Electric, Siemens, Philips, Toshiba, and other for a fraction of the cost. Products are sold worldwide to ultrasound healthcare providers such as clinics, hospitals, and imaging centers. The Company also provides repair and preventative maintenance services to customers in California and Arizona.

Need for Training

This will be Conrad Corporation’s fourth ETP-funded Agreement, second within the last five years. The Company will continue its previous training plan, training staff on providing the highest standards in quality and thoroughness for all parts, probes, peripherals, service calls, and technical support. Some courses listed in the Curriculum are the same as in the prior project. However, the courses have been upgraded to account for new technologies. Training will not be duplicated.

The ultrasound service market is highly competitive, requiring staff to be knowledgeable on ultrasound equipment from all manufacturers while expanding their knowledge in other modalities to maintain competitiveness. The Company will also focus on training sales staff on maximizing sales opportunities to grow the customer base.

Additionally, Conquest Imaging recently invested in a new Flying Probe Machine which uses electro-mechanically controlled probes to access components on printed circuit assemblies. Training is crucial to ensure proper use and application of highly technical equipment and processes.

Training Plan

Classroom/laboratory and Productive Lab will be provided by in-house subject matter experts and vendors.

Business Skills: Training will be offered to all occupations. Training will improve fundamental communication skills, customer relationship, problem solving skills, sales techniques, project management, analytical thinking. Training will help the Company produce quality products, streamline processes and procedures, and expand. Additionally, train-the-trainer will be provided so trainers can learn to effectively provide training to trainees.

Computer Skills: Training will be offered to all occupations. Training will focus on the implementation of the Company’s new ERP System. Trainees will become knowledgeable of how the software will integrate with facets of operations, including product planning and management, manufacturing processes, sales and marketing and data management. Training topics include Microsoft Dynamics ERP System, Crystal Reporting, computer hardware, and Salesforce.

Manufacturing Skills: Training will be offered to Equipment Repairer Engineers, Field Service Engineers, Technical Training Staff, Quality/ISO Agent, and Research and Development Staff. Training will focus on improving product quality and production. Training topics include repair, soldering, and field service skills and electro-static discharge training.

Continuous Improvement: Training will be offered to all occupations. Training will promote quality and process improvement. Training topics include root-cause analysis, Quality Assurance 360 and process improvement.
Productive Laboratory (PL)

Trainees may produce goods for profit as a 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.

Conquest Imaging is requesting PL training for Equipment Repairers Engineers, Field Service Engineers, Technical Training Staff, Research & Development Staff, and Quality/ISO Agents. Equipment to be used during PL includes the Flying Probe Machine and Ultrasound Systems. PL is necessary for manufacturing processes because classroom training alone is insufficient to impart necessary skills and product is too expensive to use as practice material. The Company is requesting a trainer-to-trainee ratio of 1:3 since equipment is manned by 2-3 staff members at a time during the work period. The 1:3 ratio will allow trainees to work together in small groups and learn from each other while under the supervision of a trainer.

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 for each piece of equipment. PL will be capped at 24 hours per trainee.

High Unemployment Area

Conquest Imaging is located in San Joaquin County, a High Unemployment Area with unemployment exceeding the state average by at least 25%. However, the Company is not requesting a wage modification.

Veterans Program

Conquest Imaging will train 6 Veterans under this proposal (Job Number 3).

Commission Sales

Sales staff receive commission compensation; however, commissions will not be used to meet the ETP minimum wage requirement.

Conquest Imaging is not in Retail Trade; therefore, this proposal is not affected by the Panel’s recent low funding priority placement of Commission Sales occupations in Retail Trade.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0202</td>
<td>Stockton</td>
<td>08/04/14 – 08/03/16</td>
<td>$55,328</td>
<td>$55,328</td>
<td>(100%)</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Assertiveness
- Accounting
- Budgeting
- Coaching
- Collaboration
- Communication
- Conflict Management
- Critical/Strategic Thinking
- Customer Retention
- Customer Service
- Analysis/Decision Making
- Effective Business Writing
- Effective Meeting
- Facilitating
- Finance and Accounting for Non-Financial Personnel
- Forecasting
- Interpersonal Skills
- Inventory
- Leadership
- Marketing
- Negotiation
- Presentation
- Process Management
- Product Knowledge
- Project Management
- Purchasing
- Selling Techniques/Skills
- Technical Writing
- Training Strategies and Techniques
- Train-the-Trainer

**COMPUTER SKILLS**
- Microsoft Office (Intermediate/Advanced)
- Microsoft Dynamics ERP System
- iPad Applications Training
- Salesforce
- Constant Contact
- Crystal Reporting
- Servers
- Networking
- Computer Hardware
- Programming
- Developer
- Database
- Storage Technology
CONTINUOUS IMPROVEMENT
- Control of Documents and Records
- Process Improvement
- Process Management
- Quality Assurance 360
- Root Cause Analysis

MANUFACTURING SKILLS
- Assembly
- Blood Borne Pathogen
- Electro Static Discharge Training
- Evaluation
- Field Service Skills
- Flying Probe Operations
- Installation
- Logout/Tagout
- Maintenance
- Personal Protective Equipment
- Repair
- Repair & Rework Certification
- Shipping/Receiving
- Soldering Skills
- Testing
- Warehouse Processing

PL Hours

0-24

MANUFACTURING SKILLS (1:3 trainer-to-trainee ratio)
- Flying Probe Operations
- Product Evaluation & Testing
- Product Assembly
- Product Installation
- Repair
- Quality Testing
- Backup/Restore Hard Drive Techniques

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

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. PL is capped at 24 hours per-trainee.
Training Proposal for:
Top of the Third, Inc.

Small Business
ET17-0440

Approval Date: February 10, 2017

ETP Regional Office: Sacramento
Analyst: K. Smiley

CONTRACTOR

- Type of Industry: Multimedia/Entertainment
  Priority Industry: ☐ Yes ☒ No

- Number of Full-Time Employees
  California: 14
  Worldwide: 14
  Number to be trained: 14
  Owner ☐ Yes ☒ No

- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☒ Yes ☐ No
- High Unemployment Area (HUA): ☒ Yes ☐ No
- Turnover Rate: 14%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $10,780
- In-Kind Contribution: $15,000
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Impropr</td>
<td>14</td>
<td>8-60</td>
<td>0-8</td>
<td>$770</td>
</tr>
<tr>
<td></td>
<td>SB &lt;100</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SET</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>HUA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*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:** $22 SB Non-Priority
- **County:** Tulare
- **Occupations to be Trained:** Administrative Staff, Operations Staff, Marketing Staff, Event Coordinator, Ticketing Staff, Frontline Manager
- **Union Representation:** ☑ Yes
  ☒ No
- **Health Benefits:** Up to $1.62 per hour

**SUBCONTRACTORS**

- **Development Services:** Strategic Business Solutions, LLC of Visalia assisted with development services for a flat fee of $900.
- **Administrative Services:** Strategic Business Solutions, LLC will also provide administrative services for a fee not to exceed 7% of payment earned.
- **Training Vendors:** To Be Determined

**OVERVIEW**

Founded in 1946 and located in Visalia, Top of the Third, Inc. (Top of the Third) (http://www.rawhidebaseball.com) owns and operates The Visalia Rawhide, a class A baseball farm team affiliated with the Arizona Diamondbacks Major League Baseball franchise. Top of the Third also owns and operates the baseball venue. The venue hosts professional baseball entertainment, high school playoffs, concerts, charitable events and other community activities. Under this ETP contract, Top of the Third plans to train stadium, operations and event employees.
Need for Training

This will be Top of the Third’s second ETP Agreement, second in the past five years. The previous Agreement focused on cross-training to ensure staff flexibility, increase skill sets, and improve employee professionalism to promote a cohesive corporate culture. This proposal may include employees who participated in the previous Agreement and some curriculum topics are repeated; however, course content has been updated. Training will not be duplicated.

In an effort to expand client base and grow business, Top of the Third will focus on improving customer service skills. Courses, including Business Writing, Effective Communication, Advanced Marketing and Problem Solving, will allow staff to effectively communicate with clients and attract new customers.

Top of the Third also recently purchased a new software program, HubSpot. HubSpot is a customer database and contract management system that supports marketing, sales and mass mailing functions. This software will aid marketing efforts and enhance communication with the community.

Training Plan

Class/Lab and Computer-Based Training will be provided. Training will be delivered by a combination of internal subject matter experts and vendors.

Business Skills: Training will be offered to Marketing Staff, Event Coordinators, Ticketing Staff and Frontline Managers to improve marketing strategies and customer service. Training course topics include organizational vision/strategic planning, marketing techniques, customer service and problem solving.

Commercial Skills: Training will be offered to Managers, Operations Staff and Administrative Staff on environmental control systems, lighting, irrigation, and HVAC systems. Managers and Administration Staff will require training on some equipment in the case Facility Operations Staff are not available. Training will allow staff to apply best practices. Training course topics include Facilities Operations and Maintenance, and Turf Maintenance Machinery Operation, Maintenance and Repair.

Computer Skills: Training will be offered to Administration Staff, Marketing Staff, Event Coordinators and Managers on HubSpot and legacy software programs such as Glitner and Vevonet. Training will improve software skills and increase efficiency between customers and vendors.

Continuous Improvement: Training will be offered to all occupations to create a cohesive workforce focused on organizational goals, a sense of team, support, and excellence. Frontline Managers and select trainees will receive leadership training to lead, coach, motivate and mentor staff, providing a better work environment, and increasing team morale. Training course topics will include teambuilding and leadership.

SET/HUA

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition and trainees must be earning at least the statewide average hourly wage at the end of the retention period.
Wage Modification

Trainees in Job Number 1 work in Tulare County, a High Unemployment Area (HUA) exceeding the state average by at least 25%. For these trainees, the Panel may modify the ETP Standard Minimum Wage by up to 25% if Post-Retention Wages exceed the start-of-training wages. Top of the Third is requesting the 25% wage modification, from $16.16 to $12.12 per hour.

Modification to Small Business Term

Top of the Third is requesting a modification to the Small Business term limit, from one year to two years. The Company experiences busy and slow periods throughout the year. A two-year term will allow time for the Company to train staff during the slow season and ensure trainees have the skills they need for the busy season.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET16-0307</td>
<td>Visalia</td>
<td>11/23/2015-11/22/2016</td>
<td>$10,780</td>
<td>$10,780 (100%)</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Advanced Sales
- Advanced Marketing
- Customer Service
- Organizational Vision/Strategic Planning
- Accounting Principles
- Business Writing
- Effective Communication
- Problem Solving

**COMMERCIAL SKILLS**
- Facilities Operation and Maintenance
- Turf Maintenance Machinery Operation, Maintenance, and Repair

**COMPUTER SKILLS**
- QuickBooks
- Glitner Software
- HubSpot Software
- Vevonet Training

**CONTINUOUS IMPROVEMENT**
- Teambuilding
- Leadership

CBT Hours

0-8

**COMPUTER SKILLS**
- Glitner Software training - 4 hrs
- Vevonet Software Training – 4 hrs

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per-trainee.
Training Proposal for:
Total Apps, Inc.

Small Business
ET17-0396

Approval Date: January 25, 2017

ETP Regional Office: San Diego
Analyst: K. Campion

CONTRACTOR

- Type of Industry: Technology/IT
- Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  - California: 24
  - Worldwide: 24
  - 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: 10%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $24,960
- In-Kind Contribution: $56,435
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SB &lt;100 Priority Rate</td>
<td>Computer Skills, Business Skills, Continuous Impr.</td>
<td>24</td>
<td>8-60</td>
<td>0</td>
<td>$1,040</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td>$17.22</td>
</tr>
</tbody>
</table>

- **Reimbursement Rate:** Job #1: $26 SB Priority
- **County(ies):** Orange
- **Occupations to be Trained:** Admin Staff, Designer, Programmer, Project Leader, Sales Staff, Supervisor/Manager, Owner
- **Union Representation:**
  - ☐ Yes
  - ☒ No
- **Health Benefits:** N/A

SUBCONTRACTORS

- **Development Services:** Training Funding Source (TFS) in Seal Beach assisted with development for a flat fee of $1,500.
- **Administrative Services:** TFS will also provide project administrative services for an amount not to exceed 13% of payment earned.
- **Training Vendors:** To Be Determined.

OVERVIEW

Founded in 2008 and located in Aliso Viejo, Total Apps, Inc. (https://total-apps.com) (Total Apps) is a computer software developer, software and solutions for credit card merchant processing clients. These customers are primarily on-line merchants that accept credit card payments, including ecommerce retailers and mobile vendors.

Total Apps’ software and solutions are designed to improve efficiency, and minimize potential risks during on-line payment activities. The Company is constantly creating new payment technologies to integrate with social media marketing, biometrics, fraud detection and mitigation services, and video checkout.
To be competitive, Total Apps is migrating its main software platform from Taboo to Salesforce, which is projected to increase sales, and lower operational costs. Training is required for staff to utilize this new system and customize it for the Company’s client base.

Training will also take place on newly-developed software called Video Checkout, which allows consumers to securely purchase or otherwise interact with merchants within a video, while the video continues to play. This technology works on any webpage. Total-Apps must train its staff in specific programming skills such as Angular, Hypertext, Java, XML, as well as other leading edge coding languages.

Training Plan

All training will be conducted via class/lab by in-house trainers and vendors, yet to be determined. Total-Apps projects that approximately 25% of the total training hours will be delivered via E-Learning, virtual classroom training due to the nature of the IT training environment.

Computer Skills – This training will be provided to all occupations. Trainees will learn how to Setup, configure, and maintain Salesforce applications, QuickBooks Applications, and other computer applications skills. Additionally, trainees will learn specialized computer programming languages.

Business Skills – This training will be provided to all occupations. Trainees will learn how to deliver better, faster service and increase customer satisfaction, gain repeat business, know what customers expect, increase credibility with customers, and increase sales.

Continuous Improvement – This training will be provided to all occupations. Trainees will learn Process Improvement techniques and Teambuilding skills including how to design, create and build process maps as the fundamental improvement tools to improve work flow.

Request for 2-year Contract term

Small business proposals are usually limited to a one-year term. However, Total Apps projects that some computer software updates will not be released until the end of 2017 or into 2018. As such, some training will be scheduled beyond the standard nine-month training period. Therefore, Total Apps requests a 2–year contract term to allow time to schedule and deliver all training.

RECOMMENDATION

Staff recommends approval of this proposal.
Class/Lab & E-learning Hours

8 – 60 Trainees may receive any of the following:

COMPUTER SKILLS
- Ad Networks/Social Media Application Skills
- Angular Programming Skills
- Analytics Application Skills
- BrowserStack Application Skills
- Cascading Style Sheets (CSS)3 Programming Skills
- Confluence/Jira Application Skills
- Email Marketing Application Skills
- Forums Application Skills
- GitHub Application Skills
- Google Analytics, AdWords Application Skills
- Hypertext Preprocessor (PHP) Programming Skills
- Hypertext Markup Language (HTML) 5 + - Programming Skills
- JavaScript, Java and J2EE (Java 2 Enterprise Edition) Programming Skills
- MySQL (structured query language) Programming Skills
- Pay per click (PPC) Application Skills
- QuickBooks Application Skills
- SalesForce Application Skills
- Search Engine Optimization/Search Engine Marketing (SEM) Application Skills
- Slack Application Skills
- Taboo Application Skills
- Webex Programming Skills
- Wordpress Programming Skills
- XML (Exchange Markup Language) Programming Skills

BUSINESS SKILLS
- Communication Skills
- Customer Service
- Operational Planning
- Sales Skills

CONTINUOUS IMPROVEMENT
- Process Improvement
- Teambuilding

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
DELEGATION ORDER

RETRAINEE - JOB CREATION

Training Proposal for:

Turbine Engine Components Technologies Corporation

Agreement Number: ET17-0356

Approval Date: December 15, 2016

ETP Regional Office: North Hollywood

Analyst: M. Reeves

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
<th>Job Creation Initiative</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
<th>Aerospace and Defense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Los Angeles</td>
<td>Repeat Contractor:</td>
<td>☑ Yes ☐ No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>☐ Yes ☑ No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 145</td>
<td>U.S.: 1,500</td>
<td>Worldwide: 1,500</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>☑ 7% of total trainees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>= Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$99,620</td>
<td>$0</td>
<td>$0</td>
<td>$99,620</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $111,972
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours Class / Lab</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate</td>
<td>Cont. Imp., Mfg. Skills, PL-Mfg. Skills</td>
<td>85</td>
<td>8-200 0</td>
<td>$828</td>
<td>$16.48</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 46</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Job Creation Initiative Priority Rate</td>
<td>Cont. Imp., Mfg. Skills, PL-Mfg. Skills</td>
<td>17</td>
<td>8-200 0</td>
<td>$1,720</td>
<td>$16.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 86</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:**  
Job Number 1: $16.48 per hour for Los Angeles County.  
Job Number 2 (Job Creation): $13.73 per hour for Los Angeles County.

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

**Used to meet the Post-Retention Wage?**:  
☑ Yes ☐ No ☐ Maybe  
Up to $0.48 per hour may be used to meet the Post-Retention Wage in Job Number 1.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production Staff</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Engineering Staff</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>Plant Support Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>2</td>
<td></td>
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<tr>
<td>Manager</td>
<td>4</td>
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<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production Staff</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Engineering Staff</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Plant Support Staff</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1933, Turbine Engine Components Technologies Corporation (TECT) (www.tectcorp.com) manufactures rotating components and assemblies for turbine engines for aviation and industrial applications, as well as components for other industries with similar engineering and quality requirements. The Company’s customers include Pratt & Whitney, General Electric, Snecma/Safran, Rolls-Royce and Vericor. TECT qualifies for standard
retraining under the out-of-state competition provisions as a manufacturer and is eligible for priority industry reimbursement.

This will be TECT’s second ETP Agreement in five years. The first project focused on training to support the Company’s investment in new Deckel Maho Units and Axis milling machines. The proposed training is a continuation in the advancement of TECT’s production capabilities, with an additional $11M in new manufacturing equipment. Some curriculum topics are repeated from the prior agreement. However, the course material has been updated and/or changed to address the training needs associated with the purchase of new machinery (CTX Lathes and milling machines), so there will be no duplication of training.

**PROJECT DETAILS**

TECT is experiencing steady growth due to its sustained investment in new technology/automation, which continues to enhance the Company’s ability to acquire contracts for new work. In addition, the increase in commercial aircraft production in recent years has also contributed to TECT’s growing list of global customers and suppliers. The Company is estimating a 20% increase in sales revenue for 2017. In response to growing demand, TECT is implementing process improvements and technology upgrades companywide. These upgrades include the recent purchase of approximately $11M in new CTX Lathes and milling machine equipment.

The proposed training will increase the employee skills in new equipment operation, Lean manufacturing, quality systems management and preventive maintenance. Training will take place at the Company’s facility in Santa Fe Springs.

**Retraineem - Job Creation**

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

The Company’s recent investments in new technology will expand business capacity. The Company is in the process of repurposing existing space and plans to add a third production shift to accommodate business growth. TECT has committed to hiring 17 new employees (Job Number 2). The newly-hired employees will be hired across multiple occupations and require extensive training.

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

**Training Plan**

Training will primarily be delivered by in-house subject matter experts who possess requisite certification in various machining processes.

**Continuous Improvement** (40%): Training will be offered to all occupations and focus on quality, teamwork and Lean manufacturing principles. Trainees will learn to work in cohesive, high-performing teams to solve problems and implement process improvements. This training will help the Company minimize waste, while improving quality control and efficiency.
**Manufacturing Skills (40%)**  
Training will be provided to Production and Engineering Staff. This training will equip workers with the skills and knowledge to operate and maintain equipment properly, ensure product quality, and maximize the Company’s precision manufacturing capabilities.

**Productive Laboratory – Manufacturing Skills (20%)**

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

PL training is the most effective way for employees to learn the proper use of new manufacturing equipment. Hands-on PL training will help trainees comprehend TECT’s unique production process, while providing the optimal learning environment for dealing with precision machining tools. The Company plans to provide PL training to approximately 80 Production and Engineering Staff. PL training will allow these workers to achieve the competencies needed to perform their jobs with the highest level of safety and efficiency. The training will focus primarily on equipment operation and maintenance.

The proposed PL training will involve the use of various manufacturing equipment such as lathes, mills, electrical discharge machining, balance machine and coordinate measuring machines. Training will be provided by subject matter experts with expertise in TECT's manufacturing processes and equipment. The PL trainer-to-trainee ratio will not exceed 1:1 and training is capped at 50 hours per trainee.

**Commitment to Training**

TECT spends approximately $120,000 annually on training in California. Ongoing company-funded training includes new-hire orientation, sexual harassment prevention and on-the-job training. TECT’s Human Resources Manager has prior ETP project administration experience and will oversee the scheduling, tracking, and reporting of all ETP-funded training.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0247</td>
<td>Santa Fe Springs</td>
<td>07/28/14 – 07/27/16</td>
<td>$116,480</td>
<td>$116,480</td>
<td>100%</td>
</tr>
</tbody>
</table>

**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:

CONTINUOUS IMPROVEMENT
- Lean Concepts
- Total Productive Maintenance
- Six Sigma
- Kaizen Events
- Visual Factory - Visual Management Techniques
- Quality Systems
- 5S
- ISO
- Single-Minute Exchange of Die

MANUFACTURING SKILLS
- Machine Operation Skills
  - CTX Lathes
  - Milling Machines
  - Robotics
  - Coordinate Measuring Machine
  - Electrical Discharge Machining
- Manufacturing Process/Procedures
- CNC Programming
- Equipment Maintenance

Productive Lab Hours
0 – 50

MANUFACTURING SKILLS (Ratio 1:1)
- Mill Turning & Controls on CTX Machines
- Inspection/Renishaw Probing
- Step Milling Process
- Interlock Devices
- Operation Mode Section
- Chip Disposal Inside Machine
- Zero Point Clamping System
- Tool Measurement & Breakage
- Calibration
- Laser Tool Measuring Device
- Robotics/Programming
- Preventive Maintenance
- CMM/EDM Machines

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. PL is capped at 50 hours per-trainee.
Training Proposal for: United Exchange Corp.

Small Business

ET17-0306

Approval Date: December 7, 2016

ETP Regional Office: North Hollywood Analyst: M. Niquet

CONTRACTOR

- Type of Industry:
  - Goods Movement
  - Transportation/Logistics
  - Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees
  - California: 70
  - Worldwide: 70
  - Number to be trained: 62

- Out-of-State Competition:
  - Customers Outside CA

- Special Employment Training (SET):
  - ☐ Yes ☒ No

- High Unemployment Area (HUA):
  - ☐ Yes ☒ No

- Turnover Rate: 10%

- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $24,180
- In-Kind Contribution: $23,668
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate SB &lt;100</td>
<td>Business Skills, Computer Skills, Cont. Imp., Comm'l Skills</td>
<td>62</td>
<td>8-60 0</td>
<td>$390</td>
<td>*$16.48</td>
</tr>
</tbody>
</table>

*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 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Administrative Staff, Manufacturing/ Distribution Staff, Operations Staff, Supervisors/Managers, Owner
- Union Representation:  ☐ Yes  ☒ No
- Health Benefits: $3.23 per hour

## SUBCONTRACTORS

- Development Services: Training Funding Source, Seal Beach, assisted with development for a flat fee of $1,400.
- Administrative Services: Training Funding Source will also provide administrative service for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

## OVERVIEW

Founded in 1993 and located in Cerritos, United Exchange Corp. (UEC) (www.ueccorp.com) specializes in the sales, marketing, and distribution of controlled and private label products in the Health & Beauty Aid and Household Care industries worldwide. The Company’s personal and household care product lines include personal care, pet care and household cleaning products. The Company has recently branched out to include a new division, which includes medical care products such as first aid kits, burn kits, wound care products and bandages.
Training Needs

As the industry continues to grow, the business requires a higher level of customer service and improved quality standards. Enterprise Resource Planning (ERP) Systems are now readily available on cloud computing environments so small businesses no longer need to maintain local servers to run critical software. Respectively, as a small business, UEC has continued to grow with this trend and seeks to improve its ERP System by integrating wholesale and distribution editions to help the Company create and maintain efficiency and flexibility. To remain successful, the Company must equip its employees with the skills to maximize operational resources and effectively implement new processes.

This will be UEC's second Agreement with ETP. Previous training focused on business management and computer skills. None of the training from the prior ETP Agreement will be repeated and only topics that were not provided in the previous Agreement will be offered in this Agreement.

Training Plan

Training will take place at the Company’s single location in Cerritos. It will be provided by both in-house subject matter experts and vendors to be identified during the contract term. This training will primarily focus on UEC’s ERP system, which manages all aspects of the Company’s operations. The new training will also include skills in E-Commerce transactions to provide a seamless solution from online sales to back-end processing. This is a new component on UEC’s ERP system and ensures that the Company runs efficiently.

Business Skills: Training will be offered to all occupations. Training will focus on customer service, product knowledge, time management and communication. This training is intended to enable employees to communicate information accurately. Employees will learn to be more efficient at time management, including activity logs, to-do lists, multitasking and organizational skills.

Commercial Skills: Training will be offered to all occupations to control inventory and manage supply chain measures, including inventory trends, stock on-order and supplier on-time performance. This training will provide a thorough understanding of distribution processes including assembly, inspection and quality control.

Computer Skills: Training will be offered to all occupations. This training will help employees become more proficient in the use of various business software solutions. These modules will cover software applications related to resource planning, e-commerce and report writing.

Continuous Improvement: Training will be offered to all occupations. This training will provide employees a better understanding on how business process works, where the source of the problem lies, and what opportunities are immediately addressable. Employees will learn to build and implement plans together to achieve sustainable business process.

Temporary to Permanent Hiring

UEC intends to train five 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. According to UEC the average time for “converting” temporary workers into full-time permanent employment is 90 days. It is
expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled as trainees until after they have been hired by UEC 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.

These temp to perm trainees do not represent an increase in net new hires, therefore they will be funded under the incumbent job number.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>$ %</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0154</td>
<td>Cerritos</td>
<td>09/19/2012-09/18/2014</td>
<td>$49,686</td>
<td>$24,063</td>
<td>(48%)</td>
</tr>
</tbody>
</table>

Training under the previous agreement was provided at a slower pace than expected. This was UEC’s first Agreement and effort in establishing and building a training program. The initial learning curve did not allow the program to proceed as planned. Although training was conducted, it was not fully documented; therefore, the project was not administered in accordance with the terms of the agreement.

Since then, UEC has hired a full-time HR Administrator with a background in Training and Development who will manage this program to ensure ETP agreement requirements are met. The Company now has program experience and a better understanding of how to be successful. This proposed project has been right-sized in alignment with the Company’s prior earnings.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Accounting
- Coaching/Communication
- Payables and Receivables
- Customer Relations
- Goal Setting, Company Vision
- Inventory Control
- Product Knowledge
- Project Management
- Selling Tactics
- Time Management
- Business Writing Skills

**COMMERCIAL SKILLS**
- Assembly
- Inspection Techniques
- Inventory Control-Cycle Counting
- Operations (Distribution Skills-Receiving, Shipping)
- Order, Picking, Packing
- Quality Control

**COMPUTER SKILLS**
- Electronic Data Interchange
- E Commerce Tools
- E-Mail Marketing Tools
- Microsoft Office
- Netsuite ERP Software
- SQL Server
- Script Writing for Report Generation
- Walmart Retailink

**CONTINUOUS IMPROVEMENT**
- Process Improvement
- Teambuilding
- Leadership Skills

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Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
Uremet Corporation

Small Business
ET17-0380

Approval Date: December 20, 2016
ETP Regional Office: San Diego

Analyst: K. Campion

CONTRACTOR

- Type of Industry: Manufacturing

- Number of Full-Time Employees
  - California: 38
  - Worldwide: 39
  - Number to be trained: 32

- Priority Industry: Yes

- Out-of-State Competition:
- Special Employment Training (SET): Yes
- High Unemployment Area (HUA): Yes
- Turnover Rate: 13%
- Repeat Contractor: Yes

FUNDING

- Requested Amount: $37,440
- In-Kind Contribution: $45,648
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100 Priority Rate</td>
<td>Continuous Impr. Mfg. Skills Business Skills</td>
<td>32</td>
<td>8-60 0</td>
<td>$1,170</td>
<td>*$16.51</td>
</tr>
</tbody>
</table>

*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 SB Priority
- **County(ies):** Orange
- **Occupations to be Trained:** Production Worker, Sales & Support Staff, Supervisor/Manager, Owner
- **Union Representation:** ☑ Yes  ☒ No
- **Health Benefits:** $2.61 per hour

**SUBCONTRACTORS**

- **Development Services:** Bolero Associates LLC (Bolero) in Orange assisted with development for a flat fee of $1,872.
- **Administrative Services:** Bolero will also provide project administrative services for an amount not to exceed 13% of payment earned.
- **Training Vendors:** Bolero will provide all of the proposed training.

**OVERVIEW**

Founded in 1992 and located in Santa Ana, Uremet Corporation (Uremet) (www.uremet.com) manufactures high performance, solid polyurethane industrial wheels for amusement parks roller coasters, cranes and monorails; and other industries. Services include material handling and transportation. The wheels are customized and range in size from 3 to 36 inches in diameter, to withstand speeds in excess of 150 miles per hour. The Company’s functions include research and technology development, design, engineering, prototype development, testing, and manufacturing and repair. This will be Uremet’s first ETP Agreement.
Customers are requiring reduced lead times, improved quality and lower costs. To maintain competitiveness, Uremet plans to change its work practices and promote Lean objectives in its manufacturing operations. This will reduce manufacturing costs and increase shipment speed, and improve workflow, quality and processing time.

To achieve its Lean objectives, Uremet has developed a comprehensive training plan companywide. Training will focus on: 1) Manufacturing Skills designed to improve the movement of product in all phases of operations, 2) Business Skills training for effective project management that will improve communication and planning, and 3) Continuous Improvement skills to bolster its Lean initiatives by imparting teamwork and problem solving skills to all workers.

**Training Plan**

All training will be conducted via class/lab by a training vendor in the following:

**Continuous Improvement:** Training will be provided to all occupations. Workers will learn how to apply Lean principles and Quality Management Systems to help streamline their workplace, identify areas of waste and reduce costs. Teambuilding, Problem Solving and Interpersonal Skills will help boost morale. Trainees will learn how to develop practical solutions in manufacturing areas. Leadership Skills and Change Management training will help leaders lead the changes at the Company.

**Manufacturing Skills:** Training will be provided to all occupations. This training will expand the Company’s long-term gains and improvements in efficiency, personnel and equipment performance. This training will reduce overall production time and enable the Company to compete in the marketplace.

**Business Skills:** Training will be provided to all occupations. Trainees will learn Planning, Communications, Project Management Skills and Customer Focus Techniques to help them effectively prioritize work to meet customer expectations.

**Request for 2-year Contract term**

Small business proposals are usually limited to a one-year term. However, due to production requirements, Uremet must train in small groups and, as such, has scheduled training beyond the standard nine-month training period. Therefore, Uremet requests a 2–year contract term to allow time to schedule and deliver all training.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 60 Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- Problem Solving
- Teaming/Teambuilding Skills
- Interpersonal Skills
- Conflict Management
- Lean Practices
- Quality Management Systems
- Change Management
- Leadership Skills
- Coaching/Mentoring Skills

MANUFACTURING SKILLS

- Machining Skills
- Supply Chain Management
- Production Practices
- Warehousing Skills
- Order Processing
- Enterprise System & Software Skills

BUSINESS SKILLS

- Planning Skills
- Communication Skills
- Project Management Skills
- Customer Focus Techniques

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
DELEGATION ORDER

Retrainee - Job Creation
Training Proposal for:
USOC Medical

Small Business
ET17-0359

Approval Date:  December 15, 2016

ETP Regional Office:  San Diego  Analyst:  M. Ray

CONTRACTOR

- Type of Industry:  Services
  Technology/Other
  Priority Industry:  ☐ Yes  ☒ No

- Number of Full-Time Employees
  California:  74
  Worldwide:  74
  Number to be trained:  81
  Owner  ☐ Yes  ☒ No

- Out-of-State Competition:  Customers Outside CA
- Special Employment Training (SET):  ☐ Yes  ☒ No
- High Unemployment Area (HUA):  ☐ Yes  ☒ No
- Turnover Rate:  4%
- Repeat Contractor:  ☐ Yes  ☒ No

FUNDING

- Requested Amount:  $80,652
- In-Kind Contribution:  $95,480
# TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SB &lt;100</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement</td>
<td>74</td>
<td>8 - 60</td>
<td>0</td>
<td>$990</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 45</td>
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</tr>
<tr>
<td>2</td>
<td>Retrainee SB &lt;100</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement</td>
<td>7</td>
<td>8 - 60</td>
<td>0</td>
<td>$1,056</td>
</tr>
<tr>
<td></td>
<td>Job Creation Initiative</td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 48</td>
<td></td>
</tr>
</tbody>
</table>

*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: $22 SB Non-Priority
- **County(ies):** Orange
- **Occupations to be Trained:** Accounting, Customer Service, Technician, Lead Technician, Sales, Shipping/Receiving, and Manager
- **Union Representation:** ☐ Yes  ☑ No
- **Health Benefits:** Job #1: $1.50 per hour  Job #2: $0.76 per hour

## SUBCONTRACTORS

- **Development Services:** Training Funding Source (TFS) in Seal Beach will assist with the development of this proposal for a flat fee of $1,900.
- **Administrative Services:** TFS will also assist with the administration for a fee not to exceed 13% of earned funds.
- **Training Vendors:** To Be Determined

## OVERVIEW

Formed in March 2008, USOC Medical ([www.usocmedical.com](http://www.usocmedical.com)) is a biomedical equipment services and repair company. Located in Irvine, the Company provides biomedical equipment repair solutions to over 50 different medical devices to various customers including healthcare facilities, clinics, and medical companies.
Medical technology is a broad field of innovation where the constant development of medical devices and equipment has made significant contributions to improving the health of the people. Consequently, the challenges in dealing with medical equipment have also evolved, particularly with products from companies such as Philips, General Electric, Baxter, Medfusion that continually introduce new and advanced medical devices. These new devices require USOC Medical to stay current on products and to successfully provide exemplary service to its customers.

Further, due to regulatory changes imposed by the healthcare act, Centers for Medicare & Medicaid Services, and National Patient Safety Goals, an increasing number of USOC Medical’s are transitioning to bedside monitoring systems and electronic medical records. Customer are also integrating medical equipment technology, telehealth services (use of electronic information and telecommunication technologies to support long distance clinical healthcare), and mobile technologies such as utilizing tablets and smart phones.

In addition to technological and regulatory changes, USOC Medical is faced with fierce competition from multi-billion dollar conglomerate companies such as Aramark, Trimedx, and Sodexo, as well as various original equipment manufacturers such as General Electric, Philips, and Baxter. These companies have expanded services to include biomedical equipment repair with greater ability and resources to train employees per manufacturer standards which pose a significant disadvantage to smaller companies such as USOC Medical.

In order to confront these challenges, the Company is committed to expand business processes focusing on individualized customer service and high quality performance through increased technology access. USOC Medical recently deployed new electronic quality control data sheets to assist all biomedical teams provide quick access in reviewing data and assisting with audits. The Company has implemented monthly updates to its proprietary Customer Relationship Management (CRM) system as well as its web portal to allow effective customer interactions and for customers to streamline processes in placing orders, generating shipping labels, checking prices, and exporting reports.

The Company has committed to providing its workforce the necessary education and training to successfully support all aspects of medical equipment service and management. ETP funding will allow USOC Medical to deliver a comprehensive training program that incorporates business, commercial, computer, and continuous improvement skills to meet its business goals. Implementation of this training will enable the Company increase production efficiencies and provide exemplary customer service necessary for the Company to remain at the forefront of the biomedical service and repair industry.

**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.

USOC Medical is expanding its technical department and remodeling an additional 9,000 square feet of space to efficiently service customers’ new equipment. The Company has committed to hiring seven new workers (four Technicians, one Lead Technicians, and two Sales Staff). These net, new workers will be included in the proposed training plan (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. Trainees will be hired into “net new jobs” as a condition of contract.
Training Plan

**Business Skills** – Training will be provided to all occupations. Training topics include Coaching, Communication Skills, Customer Relations, Interpersonal Communications, and Work Processes and Procedures. Training will allow workers to improve professional customer relationship, contract negotiations, and quality of customer service.

**Commercial Skills** – Training will be provided to all occupations. Course topics in various equipment services and repair, as well as extensive product and service knowledge, will enable trainees to perform operations to audit standards. Training will also enable workers to provide quicker response times and improve analytical skills to provide effective recommendations to customers regarding equipment life cycle and trends in equipment issues.

**Computer Skills** – Training will be provided to all occupations. With monthly updates of the Company’s proprietary CRM system, workers must attain skills to keep pace with new modules to meet quality and modernization goals. Training will also include development and applications skills in Materials and Logistics Software Development, Microsoft Office, Web Portal, and FedEx Management System.

**Continuous Improvement** – Training will be provided to all staff to increase their performance in the areas of leadership, productivity, product knowledge, quality fundamentals, failure and effects analysis, and project management. Training topics in also include International Organization for Standardization, Efficiency Workflow, Technical Presentations, and Design for Customer Excellence.

**Commissions**

Per Title 22, CCR, Section 4418(b): “The Panel may use commission earnings to determine a trainee’s hourly wage, if there is a reliable history of commission payment by the employer and if actual payment can be verified. As used herein, “commission” means a percentage or proportion of the sale price, for services rendered in the sale of goods or services, paid to employees whose principal job duty is sales.”

Sales Staff and Customer Service Staff (Job Number 1) earn commission which is added to their base wages to meet the Post Retention Wage of $16.51.

- Base hourly rate for Sales Staff ranges from $1,200 - $3,000 a month ($13.75 per hour). Commission is based on number of phone calls, number of new accounts, and total gross sales; and

- Base hourly rate for Customer Service Staff ranges from $700 - $1,300 a month ($6.25 per hour). Commission is based on a percentage of gross sales each month.

All Sales and Customer Service Staff will earn $16.51 per hour (employer-paid health benefits of $1.50 per hour, and commissions if needed).

USOC Medical is not a retail trade industry and does not sell products or services directly to individual consumers. As such, occupations paid by commission quality for ETP funding as they do not fall under the Panel’s “lowest priority” for FY 2016/17.

**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**
- Coaching
- Communication Skills
- Customer Relations
- Interpersonal Communications
- Work Processes and Procedures

**COMMERCIAL SKILLS**
- Biomedical Equipment Services and Repair
- Data Mining Process for Root Cause analysis and Life Cycle Analysis
- Equipment Operation & Maintenance (Medical Devices that are networked with Central Servers, Telemetry, and Monitoring Systems)
- Product and Service Knowledge
- Preventive Maintenance Procedures
- Troubleshooting and Repairs on Medical Equipment

**COMPUTER SKILLS**
- Customer Relationship Management (CRM)
- Materials and Logistics Software Development
- Microsoft Office
- Web Portal
- FedEx Management System

**CONTINUOUS IMPROVEMENT**
- Design Tools and Practices
- Design for Customer Excellence
- Efficiency Workflow
- Project Management
- International Organization for Standardization (ISO)
- Failure Modes and Effects Analysis
- Product Quality and Reliability
- Productivity Improvement
- Quality Fundamentals/Core Skills
- Reporting and Performance Procedures
- Technical Presentations
- Technical Product Knowledge
- Leadership Skills
- Teambuilding

Note: Reimbursement for retraining is capped at 60 total hours, per-trainee, regardless of method of delivery.
Training Proposal for:
Vertex Pharmaceuticals (San Diego) LLC

Agreement Number: ET17-0362

Approval Date: December 9, 2016

ETP Regional Office: San Diego
Analyst: K. Campion

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Priority Rate Retraine</th>
<th>Industry Sector(s):</th>
<th>Biotechnology/Life Sciences</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>Yes □ No □ No</td>
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<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>San Diego</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>□ Yes  □ No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Employees in:</td>
<td>CA: 215  U.S.: 1,659  Worldwide: 2,060</td>
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<tr>
<td>Turnover Rate:</td>
<td>2%</td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>% of total trainees 10%</td>
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FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
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<tbody>
<tr>
<td>$95,256</td>
<td>$0</td>
<td>$0</td>
<td>$95,256</td>
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In-Kind Contribution: 100% of Total ETP Funding Required $254,485
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineep Priority Rate</td>
<td>Business Skills Commercial Skills Computer Skills</td>
<td>147</td>
<td>8-200</td>
<td>0</td>
<td>$648</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 36</td>
<td>$19.00</td>
</tr>
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</table>

**Minimum Wage by County:** $16.72 - 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**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative/HR &amp; Operations Staff</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Senior Administrative/HR &amp; Operations Staff</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Research Associate</td>
<td></td>
<td>19</td>
</tr>
<tr>
<td>Research Scientist</td>
<td></td>
<td>42</td>
</tr>
<tr>
<td>Scientific Computing Staff</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Sr. Research Scientist &amp; Sr. Scientific Computing Staff</td>
<td></td>
<td>43</td>
</tr>
<tr>
<td>Engineering Staff</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Supervisor/Manager</td>
<td></td>
<td>15</td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1989 and headquartered in Boston, MA, Vertex Pharmaceuticals (San Diego) LLC (Vertex) [www.vrtx.com](http://www.vrtx.com), is a global biotechnology, research and development company that aims to discover, develop and commercialize innovative medicines for people with serious diseases. Vertex has one facility in San Diego, the site of the proposed training.

Vertex works with researchers, doctors, and public health experts who collaborate to help those with serious diseases. Vertex currently has two drugs on the market to treat cystic fibrosis, and is constantly researching and developing other medicines. In addition to its clinical development programs focused on cystic fibrosis, Vertex has more than a dozen ongoing research programs aimed at other serious, life-threatening diseases.

**PROJECT DETAILS**

To fulfill its mission of developing medicines to treat serious diseases, and because scientific research is a constantly changing environment, Vertex must continually train its staff in scientific
disciplines and laboratory best practices. In July 2016, Vertex spent approximately $500,000 for a Flow Cytometer, a laser-based, biophysical technology meter used in cell counting, cell sorting, biomarker detection, and protein engineering. Vertex scientists will need training in advanced analytical flow cytometry applications and in other areas of science and technology, such as gene editing technologies.

Scientists and other staff work in project team environments and are constantly looking for ways to move projects forward in the drug discovery process. Vertex leaders must train project teams to adapt, and scientific teams to work and effectively manage their teams. Further, Vertex reports that project management and leadership skills are essential to business success as the Company strives to develop drugs as effectively and efficiently as possible. As such, Vertex must also provide Business Skills training to staff. Computer skills training in scientific application software is also necessary to further support its drive to deliver quality and timely results needed to move projects forward.

Training Plan

Training will be conducted via class/lab primarily by in-house instructors. Training vendors may also be utilized.

**Business Skills** (40%) – This training will be provided to all occupations to facilitate professional development and apply leadership concepts effectively in business situations. Employees will be trained to deliver clear and concise presentations aimed at achieving results. Training on business writing, verbal skills, active listening and behaviors required for effective communication in a variety of settings will be provided. This training will result in the ability to work through conflicts and maximize the likelihood of achieving positive outcomes.

**Commercial Skills** (35%) – This training will be provided to all occupations to ensure improved technical job skills in chemistry and biology including Gene Editing and Flow Cytometry Skills. Training will consist of predominantly science-based curriculum but also includes courses for non-scientific functions, such as HR Technical Skills.

**Computer Skills** (25%) – This training will be provided to all occupations. Trainees will learn the newest computer-based applications. Scientific Computing staff will receive training in scientific and statistics-based software Skills.

Commitment to Training

Vertex currently spends approximately $75,000 per year for training in new-hire orientation, sexual harassment prevention, general safety training including chemical safety, biological and radiation hazard training, fire extinguisher and CPR/first-aid, and on-the-job training. This training will continue at the Company’s expense.

ETP funds will help Vertex provide more specialized technical skills and job-specific training as well as business skills for its workers. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.
Training Infrastructure

The Director of Human Resources will have program oversight of this training project. One Sr. HR Associate and one Administrative Associate will be responsible for scheduling training, gathering ETP attendance rosters and enrolling and tracking all trainees in the ETP on-line systems.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200  
Trainees may receive any of the following:

**BUSINESS SKILLS**
- Situational Leadership
- Presentation Skills
- Business Writing Skills
- Influencing/Managing Conflict Skills
- Decision Making Skills
- Teambuilding & Data Communicating Skills

**COMMERCIAL SKILLS**
- Chemistry Skills
- Biology Technical Skills
- Gene Editing Technologies
- Flow Cytometer Skills
- HR Technical Skills

**COMPUTER SKILLS**
- R-Statistics Software Skills
- Imaging Software Skills
- Cell Profiler Software Skills
- Image J Software Skills
- Project Management Software Tools

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

Retrainee - Job Creation
Training Proposal for:
Walter, Wolfe, Leach and Nii, LLP dba The W CPA Group

Small Business
ET17-0417

Approval Date: January 20, 2017
ETP Regional Office: Sacramento
Analyst: W. Sabah

CONTRACTOR

- Type of Industry: Financial Services
- Priority Industry: ☑ Yes  ☒ No
- Number of Full-Time Employees
  California: 24
  Worldwide: 24
  Number to be trained: 27
- Owner: ☑ Yes  ☒ No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): ☑ Yes  ☐ No
- High Unemployment Area (HUA): ☑ Yes  ☐ No
- Turnover Rate: 5%
- Repeat Contractor: ☐ Yes  ☑ No

FUNDING

- Requested Amount: $29,304
- In-Kind Contribution: $35,000
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100 SET HUA</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement,</td>
<td>24</td>
<td>8-60</td>
<td>$1,056</td>
<td>*$12.12</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 48</td>
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</tr>
<tr>
<td>2</td>
<td>Retraine SET HUA Job Creation Initiative</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement,</td>
<td>3</td>
<td>8-60</td>
<td>$1,320</td>
<td>*$10.77</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td></td>
</tr>
</tbody>
</table>

*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: $22 SB Non-Priority
- **County(ies):**
  - Fresno
- **Occupations to be Trained:**
  - Administration Staff, Certified Public Accountant (CPA), Accounting Support Staff, Client Manager
- **Union Representation:**
  - ☑ Yes
  - ☐ No
- **Health Benefits:**
  - Job #1: $1.35 per hour

## SUBCONTRACTORS

- **Development Services:**
  - Strategic Business Solutions, LLC of Visalia assisted with development services for a flat fee of $2,051.
- **Administrative Services:**
  - Strategic Business Solutions will also provide administrative services for a fee not to exceed 10% of payment earned.
- **Training Vendors:**
  - To Be Determined

## OVERVIEW

Founded in 2016 and headquartered in Fresno, Walter, Wolfe, Leach, and Nii, LLP dba The W CPA Group (W CPA) (www.twcpa.com) is a newly formed accounting firm and business consulting enterprise. They were originally part of another CPA firm in Fresno; however, the retirement of a senior owner within that company resulted in the development of W CPA. Their
services include preparing tax returns, comprehensive tax planning strategies, small business accounting, payroll services, bank financing, cash flow management, personal financial planning and more. Their customers include individuals and all types of corporate, partnership and non-profit organizations. All employees at the Company’s location in Fresno will participate in training.

**Need for Training**

According to W CPA, in the last few years many accounting companies have started expanding their services to the restaurant and private club industries. W CPA is also expecting its practice to provide specialized accounting services to in this field. To this end, it recently purchased industry-specific computer software such as the Practice CS, Jonas Software and Aloha Restaurant Software.

Employees require training on these new systems to properly utilize membership databases, accounting functions, marketing functions, Point of Sale, inventory management, purchasing and cash flow.

The Company must also provide training in Continuous Improvement and Business Skills.

**Retrainee - Job Creation**

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

Customer demand in the restaurant industry and private club industry is increasing and many of these clients are requesting industry specific accounting services to improve their efficiency. The consulting services offered by W CPA sets them apart from their competition because in addition to tax advice and accounting services, the Company has advisors from different business backgrounds on staff to help with cash flow, investments, staffing, and strategic planning. The Company has secured many new clients within the restaurant and country club industries. To support the expansion, the Company has committed to hire 3 new employees (Job number 2).

The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

**PROJECT DETAILS**

**Training Plan**

Trainees will receive between 8-60 hours of Classroom/Laboratory training delivered by in-house subject matter experts.

**Business Skills:** Training will be offered to all occupations to improve project management skills, customer service, presentation skills, and business operation skills. Training topics will include Client Relationship and Management, Effective Presentation, Financial Services, Marketing & Support, Research Skills and Customer Product Knowledge/Improvements.

**Commercial Skills:** Training will be offered to all occupations on preparation and documentation of financial statements to establish a standard within this new organization. Training will create uniformity and insure that all accountants organize their projects in the same
manner. Training topics will include Financial Statement Preparation and Generation, Gift and Estate Planning, Tax Authority Audit and Tax Planning and Preparation.

**Computer Skills:** Training will be offered to all occupations to enhance computing abilities and increase knowledge of database creations, spreadsheets and reports in their new software systems. Training will also focus on website development and social networking/marketing. Training topics will include Website Development, Advanced Computer Networking, QuickBooks Accounting Software, and Aloha Restaurant Software.

**Continuous Improvement:** Training will be offered to all occupations to develop staff’s decision-making skills, improve business flow and encourage team collaboration. Trainees will learn to mentor colleagues and manage projects to remain focused on the Company’s goals and leadership values. Training will include Teambuilding and Leadership.

**SET/HUA**

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

However, all trainees work in a High Unemployment Area (HUA) exceeding the state average by at least 25%. The Company’s location in Fresno County qualifies for HUA status under these standards. W CPA is requesting a HUA wage modification from $16.16 to $12.12 per hour for Job number 1 and $13.22 to $10.77 per hour for Job Number 2.

**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**
- Account Development
- Effective Communications
- Recruiting/Interviewing Skills
- Strategic Planning
- Coaching/Mentoring

**COMMERCIAL SKILLS**
- Financial Statement Preparation and Generation
- Tax Planning and Preparation
- Gift and Estate Planning
- Tax Authority Audit
- Tax Credit Programs
- Filing taxes in accordance to Affordable Care Act
- Business Practice Management/Consulting

**COMPUTER SKILLS**
- Website Development
- Advanced Computer Networking
- Quickbooks Accounting Software
- Practice CS/File Cabinet CS/Fixes Assets CS/Ultra Tax CS
- Bill.com software training
- Aloha Restaurant Software
- Social and Media Marketing

**CONTINUOUS IMPROVEMENT**
- Team Building
- Leadership

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
DELEGATION ORDER

RETRAINEE - JOB CREATION

Training Proposal for:

Wurth Louis and Company

Agreement Number: ET17-0313

Approval Date: January 4, 2017

ETP Regional Office: San Diego  Analyst: J. Davey

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainee SET</th>
<th>Industry Sector(s):</th>
<th>Wholesale Trade</th>
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<tbody>
<tr>
<td>Counties Served:</td>
<td>Alameda, Orange, San Diego</td>
<td>Repeat Contractor:</td>
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</tr>
<tr>
<td>Union(s):</td>
<td>Yes No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 187</td>
<td>U.S.: 2,100</td>
<td>Worldwide: 68,900</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors: (% of total trainees)</td>
<td>14%</td>
<td></td>
<td></td>
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</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
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</thead>
<tbody>
<tr>
<td>$15,275</td>
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</table>

In-Kind Contribution: 100% of Total ETP Funding Required $16,200
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>Business Skills, Computer Skills, Continuous Impr, HazMat</td>
<td>33</td>
<td>8-200</td>
<td>$375</td>
<td>$16.51</td>
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<td>2</td>
<td>Retrainee SET</td>
<td>Business Skills, Computer Skills, Continuous Impr, HazMat</td>
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<td>$375</td>
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<tr>
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<td>$13.76</td>
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<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 35</td>
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</tr>
</tbody>
</table>

**Minimum Wage by County:** Job 1 - $16.51 per hour Orange County; Job 2 - $28.37 per hour (SET) Statwide Average Hourly Wage; Job 3 - $13.76 per hour 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 $4.20 per hour for Job Numbers 1 and 2 and up to $2.06 per hour for Job Number 3 may be used to meet the Post-Retention Wage.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Support Staff</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Customer Service Staff</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Manager/Supervisor</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Sales/Marketing</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Technical Support Staff</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td>7</td>
<td></td>
</tr>
</tbody>
</table>

**Job 2 – SET**

| Administrative Support Staff    | 2          |                         |
| Sales/Marketing Staff           | 2          |                         |

**Job 3 – Job Creation**

| Administrative Support Staff    | 1          |                         |
| Sales/Marketing Staff           | 1          |                         |
INTRODUCTION

Founded in 1975 and located in Brea, Wurth Louis and Company (Wurth Louis) provides quality products to the woodworking industry. Originally Louis and Company, Wurth Louis was purchased in July 2011 by the German company Adolf Würth GmbH & Co. KG and became a wholly owned subsidiary. Since its purchase, Wurth Louis has grown from a single US location to 20 locations around the Western United States, including five California locations: Brea, Anaheim, San Diego, San Marcos, and Fremont. These facilities provide local service and sales to the Company’s wood, automotive, and metal industry customers.

Wurth Louis’s California facilities distribute over 35,000 items, including a full line of surfacing, hardware, shop supply, woodworking machinery, and coatings. Its product portfolio includes leading brands such as Blum; Formica; Rev-A-Shelf; Knape & Vogy; Grass; Doellken Woodtape; and ML Campbell.

Wurth Louis’s California Corporate Headquarters in Brea (trainees in Job Numbers 1 & 3) is eligible for funding under Title 22, California Code of Regulations (22CCR), Section 4416(e)(1)(2) for standard retraining as the corporate support for out-of-state and California locations.

The remaining Wurth Louis and Company locations in Anaheim, Fremont, San Diego, and San Marcos (Job Number 2) will be included under SET provisions specifically targeted for frontline workers earning at least the state average hourly wage ($28.37 per hour) outlined under 22CCR, Section 4409(a). These are frontline workers located at the local distribution facilities that do not meet out-of-state competition provisions.

PROJECT DETAILS

In its first ETP Agreement, Wurth Louis planned to train its workforce in 23 different topics. However, it was only able to provide training on eight of these topics, with only 14 trainees out of 175 completing all retention requirements. The training was delivered primarily to its Customer Service department.

Wurth Louis’s business is expanding and growing, and new customers are creating a need for a larger organization to meet this growing demand. As a high-end distributor of woodworking materials and tools, the Company sells over 35,000 products locally through its numerous facilities. To meet demand, sales and customer service staff will need specialized customer service training to support all types of customers, from carpenters to highly trained architects. Additionally, employees will receive training on the Company’s recently implemented online ordering system. The new technology will help improve customer service and deliver products on-time and more efficiently.

Additionally, Wurth Louis recently implemented a 24/7 online ordering system designed to allow customers to purchase products on an as-needed basis. As the Company moves away from paper to a paperless organization, technology changes are impacting all aspects of the business, including sales, support, warehouse, and order delivery.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.
Wurth Louis is expanding business capacity by adding newly hired employees. The Company has committed to hiring 2 new employees (Job Number 3) at the headquarters facility in Brea. As mentioned above, the Company is expanding and growing and will need to hire new employees to meet demand. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

**Training Plan**

Training will take place at Wurth Louis’s Brea headquarters, Anaheim, Fremont, San Diego, and San Marcos by in-house trainers. Vendors may be retained as needed.

**Business Skills (20%)**: Training will be offered to all occupations. Trainees will receive course topics such as Accounting, Communication, Customer Service, Product Knowledge, and Sales/Marketing to expand their knowledge of the Company’s products and enable them to provide quality customer service to help increase revenue.

**Computer Skills (45%)**: Training will be offered to all trainees to support the implementation of new technologies. Course topics include newly deployed application software such as Barcode System, Customer Relationship Management System, Nextrack Routing System, and Warehouse Management System. Trainees will also need upgraded training in the Company’s existing computer software such as Internet Marketing System, Manufacturing Software System, and Internal Software System.

**Continuous Improvement (30%)**: Training will be offered to all trainees on topics including Lean Service, Process Improvement, Six Sigma, and Team Building. These topics are designed to streamline processes, reduce waste, and maximize worker efficiency.

**Hazardous Materials (5%)**: This training will be offered to Warehouse Staff, Technical Support Staff, Managers/Supervisors, and Administrative Staff on the proper handling and disposal of hazardous materials including use, transport, and storage of hazardous materials and Emergency Response Team. This training can also be a series of courses, specific to industry sectors involved in the transport of hazardous materials. Completion of the training will not result in a certificate; this coursework is not certified under Cal-OSHA.

**Commitment to Training**

ETP funds will not displace the Company’s existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. Wurth Louis spends approximately $67,000 annually for training at its California facilities. Currently, the Company provides mandatory Continuous Improvement, Computer Skills, and Business Skills training; new-hire orientation; OSHA mandated training; sexual harassment prevention; and first-aid training. The Company also has an on-the-job training program for installation skills and MS Office (Basic Level) is provided on an as-needed basis.

- **Training Infrastructure**

  Wurth Louis has hired National Training Company, Inc. to help with the administrative process. In addition, the Company will assign an administrative coordinator to track all class rosters and send them to National Training. The Company has developed administrative procedures to collect rosters and maximize training.
RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0305</td>
<td>Brea</td>
<td>03/03/2014–03/02/2016</td>
<td>$99,735</td>
<td>$11,736</td>
<td>(12%)</td>
</tr>
</tbody>
</table>

Following the approval of the Agreement, Wurth Louis’s business and organizational demands became a priority over training because of the loss of a major customer and the restructuring of its upper management. Consequently, the Company was unable to conduct as much training as planned at the Brea facility, although a lot of training was spread across the Company and not concentrated in Southern California. Trainees were not able to attend classes and had to focus on sales and installation demands.

Wurth Louis had proposed training on 23 different topics. It was only able to provide training on eight of those topics. Therefore, other than the Customer Service team, most of the employees did not reach 24 hours of eligible training. The Company is confident that it can be successful in this proposal. It has completed reorganization and has set the training plan as a business priority. As stated above, the Company will designate an internal administrative coordinator to work with a third-party subcontractor to administer the ETP-funded training.

DEVELOPMENT SERVICES

Wurth Louis retained National Training Company, Inc. (NTC) in Irvine to assist with development of this proposal for a flat fee of $1,500.

ADMINISTRATIVE SERVICES

Wurth Louis also retained NTC to perform administrative services in connection with this proposal for an amount not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Accounting
- Credit and Finance
- Communication
- Customer Service
- Negotiation
- Product Knowledge
- Sales and Marketing

**COMPUTER SKILLS**
- Barcode Software
- Cabinet Vision
- Computer Server Technology
- Computerized Telephone System
- Customer Relationship Management Software
- Internet Marketing Software
- Microsoft Office (Intermediate and Advanced)
- Network, Servers, and IT Support
- Nextrack Routing (software)
- Salesforce.com (software)
- Warehouse Management System

**CONTINUOUS IMPROVEMENT**
- Change Management
- Lean Service
- Process Improvement
- Six Sigma
- Team Building
- Team Problem Solving

**HAZARDOUS MATERIALS**
- Hazard Communication
- Hazardous Materials
- Hazardous Waste
- Emergency Response Team Training

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

Training Proposal for:
ZSC, LLC dba Zerorez

Small Business
ET17-0369

Approval Date: December 7, 2016
ETP Regional Office: San Diego Analyst: M. Ray

CONTRACTOR

- Type of Industry: Manufacturing
  Services
  Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees
  California: 31
  Worldwide: 31
  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: 3%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $32,448
- In-Kind Contribution: $49,146
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee SB &lt;100 Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills</td>
<td>26</td>
<td>8 - 80</td>
<td>0</td>
<td>$1,248</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: $26 SB Priority
- County(ies): Orange, Los Angeles, and Riverside
- Occupations to be Trained: Field Technician, Marketing Staff, Manager/Supervisor, Owner
- Union Representation: ☐ Yes ☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: Utility Training Company in Newport Beach will assist with administration for a fee not to exceed 13% or earned funds.
- Training Vendors: N/A

OVERVIEW

Founded in 2003 and headquartered in Irvine, ZSC, LLC dba Zerorez (Zerorez) (www.zerorezsolcal.com) provides carpet, rug and upholstery cleaning, repair and restoration services. Zerorez also provides hard wood floor buffing and maintenance and tile, grout, and stone cleaning and polishing services to residential and commercial customers.

Zerorez also manufactures its own carpet cleaning solutions. It uses a unique technology to enhance water, which is electrolyzed and oxidized to create a non-toxic, water-based cleaning agent without soap, detergent, shampoo or harsh chemical.

The proposed training will target workers in Irvine, Los Angeles and Jurupa Valley. The Company qualifies for standard ETP funding as a manufacturing company facing out-of-state competition as specified under Title 22, California Code of Regulations (CCR), Section 4416(i)(1).
The Company reports that the carpet cleaning industry is changing. Traditional business demands have declined due to an increasing number of customers who decorate with less carpeting or prefer different types of flooring such as stone, hardwood, area rugs, granite and other surfaces. The Company has also seen an increase of customers using granite and marble counter tops.

To adapt and support customer demands, Zerorez must shift its cleaning business to cater to all types of flooring and counter tops. As a result, the Company must provide highly technical training in all aspects of care and maintenance (science, applications, chemistry, and other associated areas) to fully support its products and services.

Training in this proposal is also driven by the Company’s plan to expand its manufacturing by launching new products and services specifically for home and business disinfection. Currently, the Company’s disinfecting solution is being used in hospitals. The expansion of its disinfecting solutions will allow the Company’s retail services to expand nationwide and provide customers and environmentally safer products. To support this endeavor, Zerorez has begun acquiring new equipment for increased production. This area of business will be fully operational by the end of 2017.

With the assistance of ETP funding, the Company will be able to provide its workers with the necessary training to keep pace with changes driven by customer demands as well as support its expansion goals. Training will be specific to manufacturing, production and chemical skills to promote increased understanding of water and chemical science; bacteria and other microbial; simple body chemistry; and pH levels. Training will also cover new equipment operations; building surfaces; and cleaning, maintenance, and restoration processes tailored to each customer’s needs.

Training Plan

Training will be delivered via class/lab by in-house experts.

**Business Skills:** Training will be provided to all occupations. Training in product and service marketing, customer service, accurate work plans and quotes, goal setting, effective communication and problem solving will promote a culture of exemplary customer service to successfully support new and existing businesses.

**Computer Skills:** Training will be provided to all occupations. Course topics include Booking, Scheduling, Marketing Software Applications and Social Media Programs will allow trainees to learn the Company’s software full capabilities and optimize its marketing efforts.

**Continuous Improvement:** Training will be provided to all occupations. Training will include chemical solutions and types of surfaces to improve existing daily operations and new business processes. Course topics include science, application, and preparation of pHur, electrochemical activated water, adenosine triphosphate, and hypochlorous acid. Training topics also include cleaning, maintenance, repair, and restoration of stone, hardwood, upholstery and rugs.

**Hazardous Materials:** Training will be provided to all occupations. Training will include the use of existing toxic materials and its health and environmental impacts; industry chemicals/products’ usage, cautions, dangers and proper storage; and biologics’ treatment, dangers and cleanup. Training will increase employees’ skills to effectively handle all types of hazards within their working environment.
Manufacturing Skills – Training will be provided to all. Training includes the operation, maintenance, and repair of the newly-acquired generators, as well as solution production using these generators. Training will also be provided in daily production completion and product quality measurement reports and proper order entry, fulfilment, pack and ship processes.

High Unemployment Area

Four trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company’s location in the city of Jurupa Valley qualifies for HUA status under these standards. However, Zerorez is not asking for a wage modification.

Modifications

Range of Hours

Although the standard range of hours for Small Business is 8-60 hours, Zerorez requests an increase in the maximum hours from 60 to 80 training hours, an average of 48 hours for all trainees. The increase in training hours will allow the Company to provide trainees a significant amount of science, technology and operations skills training critical to the support of its business goals mentioned above.

The Company will provide approximately 20 Field Technicians between 1 and 2.5 training hours a week.

Contract Term

Although the standard term of contract for Small Business is 12 months, Zerorez requests 24-months to allow sufficient time for completing training.

RECOMMENDATION

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 80
Trainees may receive any of the following:

BUSINESS SKILLS
- Marketing of products and services
- Educating clients on new technology
- Dealing with client questions and issues
- Developing an accurate and realistic work plan and quote
- Goal setting
- Customer service
- Effective communication skills
- Improving listening skills
- Referral generation
- Problem solving and resolution

COMPUTER SKILLS
- Booking and scheduling software application skills
- Marketing software application skills
- Social media programs

CONTINUOUS IMPROVEMENT
- The science of pHUr
- Science of Electrochemical Activated Water Technology
- Hypochlorous Acid (HOCL) and basic body chemistry
- Review of use and application of HOCL solutions in hospitals
- Bacteria and other microbials
- Review of use and application of HOCL solutions in hospitals
- Effect of HOCL on various microbials and what can be treated
- Adenosine Triphosphate meter, calibration, usage, maintenance
- Disinfection technology and training
- Electrostatic sprayer usage and maintenance
- Application, cautions, preparation of HOCL solution in homes
- Application, cautions, preparation of HOCL solution in business environments
- Microfiber cleaning products – science and construction of products
- Basic cleaning and science of alkaline cleaning of fibers, fabrics and other surfaces
- Identifying most popular surfaces/products and appropriate cleaning methods
- Identifying and assessing problems (stains, spills, damage) and proper corrective action
- Chemicals (use, cautions, disposal, etc.)
- Protectants – usage, appropriate types, application
- Stone – proper identification of types, cleaning, restoration, maintenance
- Hardwood – assessment of type, condition, maintenance, strip and wax, resurface
- Upholstery – fabric ID, evaluation, cleaning, repair, cautions
• Area rugs – construction basics, machine vs hand knotted identification, and training
• Area rug repair

HAZARDOUS MATERIALS
• Existing toxic materials and its health and environmental impacts
• Industry chemicals/products – usage, cautions, dangers, storage
• Biologics – treatment, dangers, cleanup

MANUFACTURING SKILLS
• Generator 1 operation, maintenance, repair
• Generator 1 production of solutions
• Generator 1 quality assurance/assessment
• Generator 2 operation, maintenance, repair
• Generator 2 production of solutions
• Generator 2 quality assurance/assessment
• Completion of daily production and product quality measurement reports
• Production of retail products
• Order entry, fulfilment, pack and ship processes

Safety Training will be limited to 10% of total training hours, per-trainee.

Note: Reimbursement for retraining is capped at 80 total hours, per-trainee, regardless of method of delivery.