TABLE OF CONTENTS
Panel Meeting of July 27, 2018

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

REVIEW AND ACTION ON PROPOSALS

Consent Calendar

<table>
<thead>
<tr>
<th>Proposal Name</th>
<th>Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baloian Packing Co., Inc.</td>
<td>1</td>
</tr>
<tr>
<td>Bell-Carter Foods, Inc.</td>
<td>2</td>
</tr>
<tr>
<td>Boudreau Pipeline Corporation</td>
<td>3</td>
</tr>
<tr>
<td>California Long Term Care Education Center</td>
<td>4</td>
</tr>
<tr>
<td>Chilton and Leste Management, Inc.</td>
<td>5</td>
</tr>
<tr>
<td>Courage Production, LLC</td>
<td>6</td>
</tr>
<tr>
<td>Doubleco Incorporated dba R &amp; D Fasteners</td>
<td>7</td>
</tr>
<tr>
<td>ELROB, INC., dba El-Com System Solutions (Amendment)</td>
<td>8</td>
</tr>
<tr>
<td>Fowler Packing Company, Inc.</td>
<td>9</td>
</tr>
<tr>
<td>Georgia-Pacific Corrugated LLC</td>
<td>10</td>
</tr>
<tr>
<td>Golden State Foods Corp.</td>
<td>11</td>
</tr>
<tr>
<td>Greenheck Fan Corporation</td>
<td>12</td>
</tr>
<tr>
<td>North State Electrical Contractors, Inc.</td>
<td>13</td>
</tr>
<tr>
<td>Paradigm Treatment Centers, LLC</td>
<td>14</td>
</tr>
<tr>
<td>Ricoh USA, Inc.</td>
<td>15</td>
</tr>
<tr>
<td>South Bay Workforce Investment Board, Inc.</td>
<td>16</td>
</tr>
<tr>
<td>Sun Hill Properties, Inc.</td>
<td>17</td>
</tr>
<tr>
<td>Sunvair,Inc.</td>
<td>18</td>
</tr>
<tr>
<td>SYSCO Riverside,Inc.(Amendment)</td>
<td>19</td>
</tr>
<tr>
<td>The Ultimate Software Group, Inc.</td>
<td>20</td>
</tr>
<tr>
<td>Vision Care Center, a Medical Group, Inc. dba Eye-Q Vision Care</td>
<td>21</td>
</tr>
<tr>
<td>White Nelson Diehl Evans LLP</td>
<td>22</td>
</tr>
<tr>
<td>Woodbridge Glass Inc.</td>
<td>23</td>
</tr>
</tbody>
</table>
Panel Date: July 27, 2018

**Proposals for Single-Employer Contractors**  

North Hollywood Regional Office  
Trojan Battery Company, LLC

San Diego Regional Office  
Rush Truck Centers of California, Inc.  
TTM Technologies, Inc.  
Vavrinek, Trine, Day and Co., LLP

San Francisco Bay Area Regional Office  
Boehringer Ingelheim Fremont, Inc.  
Dome Construction Corporation  
G & C Auto Body, Inc.  
George Chiala Farms, Inc.  
Ly Brothers Corporation dba Sugar Bowl Bakery  
Pinterest, Inc.

Sacramento Regional Office  
Sysco Central California, Inc.

---

**Proposals for Multiple-Employer Contractors**

North Hollywood Regional Office  
American Educational Systems, Inc. dba American College of Healthcare and Technology
Building Skills Partnership  
First Software USA dba Oxford Institute of Technology  
Kern County Electrical Joint Apprenticeship & Training Committee  
Ventura County Electrical Joint Apprenticeship and Training Trust Fund

San Francisco Bay Area Regional Office  
California Labor Federation, AFL-CIO
Carpenters Training Committee for Northern California  
District Council 16 Northern California Journeymen and Apprentice Training Trust Fund  
Northern California District Council of Laborers Construction Craft Laborers Joint Apprenticeship Training Center
Pipe Trades Joint Apprenticeship and Training Committee of Santa Clara and San Benito Counties  
United Association Local Union 342 Joint Apprenticeship and Training Committee

Sacramento Regional Office  
Central Valley Mother Lode Plumbers, Pipe and Refrigeration Fitters Joint Apprenticeship Training Committee  
Central Valley Roofers, Waterproofers & Allied Workers Joint Apprenticeship and Training Committee
SUMMARY OF DELEGATION ORDERS

Delegation Orders

Asian Investment Corporation dba SQA Solution
Bowyer Environmental Consulting, Inc.
D.T. Mattson Enterprises, Inc. dba Pro-line Racing
Firstline Security Systems, Inc.
Four Star Meat Co., Inc.
Hi-Temp Insulation, Inc.
Kern Steel Fabrication Inc.
KRT Marketing, Inc.
Lightning Bolt Solutions, Inc.
NFCC, Inc. dba North Fresno Collision Center
Scorpio Enterprises dba Airemasters Air Conditioning, Inc.
Social Imprints, LLC
Summit Machine LLC
Timberworks Construction Services, Inc.
Trofholz Technologies, Inc.
Vital Research, LLC
Memorandum

To: Panel Members
From: Stewart Knox
Executive Director

Subject: Directions to Meeting Site

The Employment Training Panel will meet on FRIDAY, July 27, 2018 at 9:30 a.m.

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

Directions to the California Environmental Protection Agency - Sierra Hearing Room

From Sacramento International Airport:

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

From San Francisco:

- Take I-80 E
- Merge onto I-5 N
- Exit on “J” Street to 11th St.
- Turn Left on 11th Street
- Turn Left on I Street
- 1001 I Street
To: Panel Members  
From: Stewart Knox  
Executive Director  

Subject: Future Meeting Sites

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 27, 2018</td>
<td>California Environmental Protection Agency</td>
</tr>
<tr>
<td></td>
<td>Time: 09:30 AM</td>
</tr>
<tr>
<td></td>
<td>Sierra Hearing Room, 2nd Floor</td>
</tr>
<tr>
<td></td>
<td>1001 I Street</td>
</tr>
<tr>
<td></td>
<td>Sacramento, CA 95814</td>
</tr>
<tr>
<td>August 24, 2018</td>
<td>California Environmental Protection Agency</td>
</tr>
<tr>
<td></td>
<td>Time: 09:30 AM</td>
</tr>
<tr>
<td></td>
<td>Sierra Hearing Room, 2nd Floor</td>
</tr>
<tr>
<td></td>
<td>1001 I Street</td>
</tr>
<tr>
<td></td>
<td>Sacramento, CA 95814</td>
</tr>
<tr>
<td>September 28, 2018</td>
<td>California Environmental Protection Agency</td>
</tr>
<tr>
<td></td>
<td>Time: 09:30 AM</td>
</tr>
<tr>
<td></td>
<td>Sierra Hearing Room, 2nd Floor</td>
</tr>
<tr>
<td></td>
<td>1001 I Street</td>
</tr>
<tr>
<td></td>
<td>Sacramento, CA 95814</td>
</tr>
<tr>
<td>October 26, 2018</td>
<td>California Environmental Protection Agency</td>
</tr>
<tr>
<td></td>
<td>Time: 09:30 AM</td>
</tr>
<tr>
<td></td>
<td>Sierra Hearing Room, 2nd Floor</td>
</tr>
<tr>
<td></td>
<td>1001 I Street</td>
</tr>
<tr>
<td></td>
<td>Sacramento, CA 95814</td>
</tr>
</tbody>
</table>
STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL
California Environmental Protection Agency
1001 I Street
Sierra Hearing Room, Second Floor
Sacramento, CA 95814
June 22, 2018
(916) 327-5640

PANEL MEMBERS

Barry Broad
   Chair

Janice Roberts
   Vice-Chair

Gloria Bell
   Member

Will Koch
   Ex-Officio Member

Gretchen Newsom
   Member

Vacant
   Member

Ernesto Morales
   Member

Ali Tweini
   Member

Executive Staff

Stewart Knox
   Executive Director

Michael A. Cable
   Legal Counsel
I. PUBLIC PANEL MEETING CALL TO ORDER

Chairperson Barry Broad called the meeting to order at 9:34 a.m.

II. ROLL CALL

Present
Barry Broad
Gretchen Newsom
Janice Roberts
Will Koch
Ernesto Morales
Ali Tweini
Gloria Bell

Absent
None

Executive Staff Present
Stewart Knox, Executive Director

Legal Counsel
Michael A. Cable

III. AGENDA

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

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

Motion carried, 7 - 0.

IV. MINUTES

It was questioned whether there were any changes and/or additions that need to be made to the Minutes from May 24, 2018. No changes were suggested or made.

ACTION: Ms. Roberts moved and Ms. Belle seconded the motion that the Panel approve the Minutes from the May 24, 2018 meeting.

Motion carried, 7 - 0.
V. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director, welcomed new Panel Member Ernesto Morales. Anthony Rendon, Speaker of the Assembly, conducted the swearing in for Mr. Morales.

Mr. Knox reported that today’s Panel Meeting concerns projects totaling just over $16.2M, with approximately $531,590 in Delegation Orders, for a grand total of just over $16.7M.

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

It was reported, regarding the Budget for Alternative and Renewable Fuel and Vehicle Technology Program (ARFVTP): that ETP is in partnership with the California Energy Commission in regards to $2M approved through an Interagency Agreement; and that ETP’s four ARFVTP proposals in the last few months totaled over $900K, with one approved for over $620K, leaving approximately $1M remaining for ARFVTP proposals this year.

It was reported, regarding Core Funds for Fiscal Year (FY) 2018/19: today the Panel will consider close to $16.9M with an additional $531K that upon the Panel approving the just over $16.9M in projects for this year, ETP will have approximately $87.1M for the remainder of FY 2018/19.

It was reported, regarding Delegation Orders: that all such project proposals are capped at $75,000; that all such project proposals are to be approved by the Executive Director on a continuous flow basis; and that the 13 projects subject to Delegation Orders for today’s Panel Meeting total just over $531K.

It was reported, regarding 2018/19 total program funding to date: that approximately 475 projects have been submitted to the Panel, with a value of just over $75M; and if all project proposals for today’s Panel Meeting are funded today, that the Panel will have approved 52 projects, with a value of just over $16.8M.

It was reported, regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at $45M in demand, with $39M in allocation; Multiple Employer Contract (MEC) requests are at $11M in demand, with $20M in allocation; Small Businesses requests are at $5.1M in demand, with $5.6M in allocation; Critical Proposals are at $1.1M in demand, with $5M in allocations; and Apprenticeship programs are at $7.7M in demand, with $16.6M in allocation. Overall demand is approximately $72M.

It was reported that the number of total projects in FY 2017/18 in the Regional Offices is 382; that the total number of projects currently in the Applications and Assessment Unit is 94; and that the number of total projects is 475.
It was reported that Staff is working hard to get the projects assigned out to the Regional Offices, and that to date about 80% of the projects have been assigned to the Regional Offices.

VI. LEGISLATIVE UPDATE

A Legislative Update memorandum was provided to Panel Members. It was reported that there are a lot of bills on Workforce Development and Cannabis; as well as two bills that directly impact ETP:

AB 2420, which adds soft skills training to ETP's legislative mandate. It was reported that ETP remains neutral and does not oppose AB 2420.

AB 1831, which changes the term of service in regards to certain appointees appointed by the Assembly. Specifically, as it pertains to those two ETP Panel Members appointed by the Speaker of the Assembly; those members will no longer serve two year terms, but rather they will now serve at the will of the Speaker of the Assembly.

VII. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

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

Ms. Newsom requested the imposition of a forfeiture of 25% of the amount earned for each trainee, which was included on Page 5 of 6 of the Proposal submitted by Sturgeon Services International, Inc. (Tab No. 15). It was recognized that the foregoing penalty was explicitly included in the Proposal provided to the Panel, and that said penalty was stated and already included in the Proposal as an option for the Panel to consider, due to a high turnover rate. Ms. Newsom requested that the Panel impose the foregoing penalty stated in the Proposal, and proceed with adoption of the consent calendar.

Ms. Newsom questioned whether veterans were being treated as lesser employees within the Proposal submitted by Virgin Galactic, LLC (Tab No. 18). Specifically, in comparing Job No. 1 employees with Job No. 2 employees, the Job No. 2 employees appear to be veterans with a lower wage range under Engineer and Administrative Staff. Ms. Newsom asked for clarification, and for Staff to follow-up on this issue.

Barry Mazell from the Training Funding Source came forward and stated that under the Proposal, Virgin Galactic, LLC is not actually paying veterans less than other employees in the same job categories.

Ms. Newsom and Mr. Broad explained that they would proceed with approval of the consent calendar with clarification that veterans are not being paid less than other employees in regards to the Proposal submitted by Virgin Galactic, LLC (Tab No. 18).
Chairperson Broad asked for a motion to adopt Consent Calendar Items #1 through #18.

Applus RTD USA, Inc. ................................................................. $144,300
Ariat International, Inc. ................................................................. $135,720
Holthouse Carlin & Van Trigt, LLP ................................................. $144,000
L&S Framing, Inc. ........................................................................ $199,342
Lance, Soll & Lunghard, LLP ......................................................... $  81,466
McKesson Medical-Surgical, Inc. ................................................. $100,620
Molecular Bioproducts, Inc. ......................................................... $123,240
Ms. C. Manager, LLC .................................................................. $154,200
Novogradac & Company, LLP ...................................................... $105,800
Pacifica Foods, LLC ................................................................. $145,600
Pioneer Circuits, Inc. ..................................................................... $152,880
Sierra Nevada Brewing Co. ......................................................... $129,480
Sierra Pacific Home & Comfort, Inc. ............................................. $196,378
Sky Rider Equipment Company, Inc. ........................................... $  98,124
Sturgeon Services International, Inc. .......................................... $196,960
Systems and Software Enterprises, LLC dba Zodiac Inflight Innovations ........................................... $ 99,840
Timberworks Construction, Inc. ................................................... $199,550
Virgin Galactic, LLC ...................................................................... $164,970

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion to approve the consent calendar for Items #1 through #18 with the clarifications concerning Tab No. 15 and Tab No. 18.

Motion carried, 7 – 0.

VIII. 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 in the event of loss of quorum to approve Proposals and other action items on the Agenda in consultation with the Panel Chair or Vice Chair.

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

Motion carried, 7 - 0.

IX. COMMITTEE REPORT TO PANEL

Ms. Newsom provided an update regarding the ETP Committee, which met the day before, on June 21, 2018. Ms. Newsom noted that the following topics were discussed at said Committee Meeting: an overview of new system upgrades; conducting a comprehensive review of ETP Legislation and Regulations; development of a permanently disabled injured worker pilot program; ETP broker model rules and strategies; an update on the status of non-traditional apprenticeship programs; and a discussion on how ETP calculates ETP wages and regions. Ms. Newsom explained that the foregoing topics are an on-going discussion, and they will be the subject of future meetings. Ms. Newsom stated that ETP Staff is working
on development of all of these topics; and that ETP Staff will bring those ideas to Committee, which will be further developed and brought as action items before the Panel.

Mr. Broad asked whether there are any current action items for the Panel.

Mr. Knox explained that there are no current action items for the Panel.

X. REVIEW AND ACTION ON PROPOSALS

**Single Employers**

**Tab #19 – Aspen Skilled Healthcare, Inc.**

Mr. Griffin presented a proposal on behalf of Aspen Skilled Healthcare, Inc., (Aspen) in the amount of $292,344. Founded in 2009 Aspen offers nursing and rehabilitative senior care at Aspen healthcare facilities throughout California. Aspen facilities are certified by Medicare, Medi-Cal, and various HMO’s. Medical care is provided for patients who no longer require acute hospitalization, but have ongoing medical needs that require care from a nurse. This proposal will include a total of 11 California Aspen facilities. This will be Aspen’s first ETP Agreement.

Mr. Griffin introduced Jeff Bradshaw, Vice President of Operations.

Ms. Roberts expressed appreciation for the modest size of this Proposal, given this is Aspen Skilled Healthcare, Inc.’s first project with ETP.

**ACTION:** Ms. Roberts moved and Ms. Bell seconded the motion for approval of the proposal for Aspen Skilled Healthcare, Inc., in the amount of $292,244.

Motion carried, 7 - 0.

**Tab #20 – General Mills Operations, LLC**

Mr. Griffin presented a proposal on behalf of General Mills Operations, LLC (General Mills), in the amount of $388,830. General Mills was founded in 1866 and is headquartered in Minneapolis, MN. The Carson facility was established in 1979, and produces General Mills yogurt products such as Yoplait and Mountain High Yogurt. These products are distributed to major retail grocery chains, wholesalers, and club stores nationwide. There are a total of three General Mills facilities located in the state of California; however, all training under this Agreement will occur at the Carson location. This will be General Mills fifth Agreement at the Carson location.

Mr. Griffin introduced Robert Gonzalez, Training Coordinator; and Arnold De Fiesta, Training Coordinator, Carson Facility.

It was questioned and clarified that this project concerns a manufacturing facility.
Mr. Gonzalez stated that there are approximately eight packaging lines now, and that they are adding one more packing line over the next six months.

It was questioned and clarified that the manufacturing facility is not unionized.

Ms. Newsom applauded the Proposal for its high wages and wage progression.

It was questioned by Mr. Tweini and Mr. Gonzalez explained that they have significant competition from many of the Greek yogurt manufacturers, such as Chobani and Dannon.

It was questioned by My. Tweini and Mr. Gonzalez explained that they have a requirement to hire a certain percentage of veterans, but Mr. Gonzalez could not recall the specific percentage amount.

ACTION: Ms. Bell moved and Mr. Tweini seconded the motion to approve the proposal for General Mills Operations, LLC in the amount of $388,830.

Motion carried, 7 - 0.

Tab #21 – Pandora Media, Inc.

Mr. Griffin presented a proposal on behalf of Pandora Media, Inc. (Pandora) in the amount of $749,320. Pandora is a music streaming and automated music recommendation service. Pandora is an internet radio, which plays musical selections of a certain genre based on the user’s artist selection on a wide range of smartphones, tablets, computers and car audio systems, as well as a range of other internet-connected devices.

Founded in 2000, Pandora started as a small company called Savage Beast Technologies with the idea of creating music preference profiles for users into an online music recommendation system using its proprietary Music Genome technology. Eventually, the Company used the genome as the engine of an Internet radio service that plays only the music users like.

Mr. Griffin introduced Jennifer Mitchell, Training and Design Specialist.

Ms. Roberts noted that Pandora Media, Inc. performed very well with its last project with ETP, obtaining 100% performance, and Mr. Roberts thanked them for coming back to ETP.

ACTION: Ms. Roberts moved and Ms. Newsom seconded the approval of the proposal for Pandora Media, Inc., in the amount of $749,320.

Motion carried, 7 - 0.
Tab #22 – Reliant Management Group, LLC

Mr. Griffin presented a proposal on behalf of Reliant Management Group, LLC (Reliant) in the amount of $437,580. Founded in 2014 and headquartered in Paramount, Reliant provides certified skilled nursing care and rehabilitation services with a specialty in senior care. Services includes short and long-term skilled nursing care, medication management, hospice, behavioral health support, diabetes management, traumatic brain injury treatment, wound treatment, dementia care, and special dietary and meal services.

Mr. Griffin introduced Luis Angel, Vice President of Corporate Development.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for Reliant Management Group, LLC, in the amount of $437,580.

Motion carried, 7 - 0.

Tab #23 – Virgin Orbit, LLC

Mr. Griffin presented a proposal on behalf of Virgin Orbit, LLC (Virgin Orbit), in the amount of $595,400. Founded in 2017, Virgin Orbit is a space vehicle manufacturing company that designs, builds, and launches rockets. As the Virgin Group's latest standalone spinoff company, Virgin Orbit's focus is launch services for small satellites. The company's customers include satellite providers and clients seeking technical advice about rocket launches. Virgin Orbit is headquartered in Long Beach and has an additional facility in Mojave. The proposed training will include employees from both locations. This will be the company's first ETP Agreement.

Mr. Griffin introduced Jesse Harris, Senior Manager of People Learning and Development.

Mr. Morales questioned and Mr. Harris stated that Virgin Orbit and Virgin Galactic are separate companies. Mr. Harris then explained that Virgin Orbit was founded in 2017, initially as part of Virgin Galactic, but now they are their own single company based in Long Beach.

Mr. Tweini asked how many of the 500 employees are veterans.

Mr. Harris indicated that the number of veterans should be included in the Proposal; but he believed it to be 20. Mr. Harris also stated that the head of manufacturing is a marine, and that they aggressively recruit veterans because they possess unique skills that they need.

Mr. Broad questioned the range of wages stated in the Proposal; specifically, whether engineers were really making $14.20/hr.

Mr. Harris explained that he believes that the lower dollar amount for engineers listed in the Proposal is due to their aggressive program of recruiting interns that are still in school.
Ms. Roberts questioned whether the interns will be part of the training program.

Mr. Broad explained that including summer interns would be a problem because they will soon be gone and Virgin Orbit, LLC will therefore not be able to get reimbursement.

Mr. Griffin explained that trainees would need to be full-time employees.

Mr. Harris stated that he did not believe that interns were included in the Proposal.

Mr. Broad noted that there is a large wage range stated in the Proposal, and Mr. Broad suggested that Staff press on the actual wages being paid in order for the Panel to have a more accurate understanding of the wage levels being paid.

Mr. Griffin stated that Staff will definitely develop and confirm the actual wages being paid.

Ms. Roberts questioned whether this new operation has the internal structure and familiarity in order to successfully perform an ETP contract.

Mr. Harris responded by stating that they are familiar with EPT and already use the ETP Roster. Mr. Harris then noted other areas that will assist in performance, including: a new learning management system; and a 5-person staff that is focused on training plans, development, instruction, and structural design, which includes learning professionals as well as engineering professionals. Mr. Harris also stated that they will work closely with their vendor in order to make sure that are able to meet 100% of their contract.

Ms. Roberts wished them well with their contract, but did note the difficulties of startups learning the ETP Program, and stated that she thought the wages would be higher.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for Virgin Orbit, LLC in the amount of $595,400.

Motion carried 7-0.

Tab #24 – AFFIRMA Rehabilitation, Inc.

Ms. Torres presented a proposal on behalf of AFFIRMA Rehabilitation, Inc. (AFFIRMA) in the amount of $387,504. Founded in 1994 and headquartered in Aliso Viejo, AFFIRMA is a subsidiary of Covenant Care California, LLC. AFFIRMA is a nationwide on-site provider of quality rehabilitation therapy services. AFFIRMA provides on-site therapist services to various contract healthcare facilities. AFFIRMA has over 1,500 therapy professionals serving over 100 skilled nursing hospitals, residential care, and outpatient facilities in 7 states. Most employees work at customer facility locations throughout the state.

California has a shortage of skilled allied healthcare workers, therefore, companies such as AFFIRMA, are able to assist with customer healthcare staffing needs. To continue to meet customer needs for quality healthcare workers, AFFIRMA must train and hire physical
therapists, including new graduate therapists to meet client and respective patient care demands.

Ms. Torres introduced Judy Elmore, Vice President and Bill Parker, National Training Group.

Mr. Broad questioned and Ms. Elmore explained that they are supplying physical therapy services to rehabilitation hospitals and facilities; and that they are bringing in their physical therapists. Ms. Elmore stated that they look at the facilities as their customers.

Ms. Roberts asked whether they work independently from the hospitals.

Ms. Elmore said no and explained that upon initiating a contract with a facility, then they become their department by fully staffing them on an ongoing basis with all of the necessary employees.

Ms. Roberts asked whether the reduction of the average work week to 30 hours, as indicated in the Proposal, was due to a work at home situation.

Ms. Elmore responded by stating no; that the majority of persons work 40 hours a week, but that their policy uses a 30-hour threshold for determining full-time employees for purposes of benefits and other things.

Ms. Newsom asked whether any incentives were going to be used in order to pay their employees less.

Ms. Elmore stated that they will definitely pay the higher wages; and that higher wages are a given for therapists, who are currently in major demand.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for AFFIRMA Rehabilitation, Inc., in the amount of $387,504.

Motion carried, 7 - 0.

Tab #25 – Unical Aviation, Inc.

Ms. Torres presented a proposal on behalf of Unical Aviation, Inc. (Unical) in the amount of $409,500. Founded in 1990 and located in the City of Industry, Unical supplies aircraft parts and components to the aerospace industry from a 500,000 sq. ft., facility. The company also assists its customers with part and component repair product lifecycle focused on heavy maintenance repair, daily repair, component repair and engine services. The company has built partnerships with aerospace part suppliers all around the world, accumulating a massive inventory of parts. The company provides its products to over 3,500 customers worldwide including major airlines and defense contractors.

Ms. Torres introduced Lorynn Negron, Vice President of Human Resources and Michelle Rickner of Training Financial Partners.
Ms. Newsom questioned the wage ranges. Specifically, using Job No. 2 as a reference, the Production Staff wage range is between $11.47 to $40/hr. Accordingly, Ms. Newsom asked roughly how many of the 100 proposed trainees are at the lower end of the wage range.

Ms. Negron stated that they actually have no employees making less than $14/hr. There are some summer interns currently making $13/hr, but as for employee wages, their target is to have everybody at least at $15/hr in the following year.

Ms. Newsom asked how many of the employees are at the much higher end, such as $22 to $40/hr.

Ms. Negron said she thinks the answer is about 92%.

Mr. Roberts then questioned whether the wage modification would no longer apply.

Ms. Torres said they are still $1 short, so they would still need the wage modification and that would bring them up to $16. With the health benefits, it would be $16.50. Ms. Torres said that she thinks that they need to make $17.54. Ms. Torres said she did not know what the wage is for the County of San Bernardino, but then they could actually put them all in under Job No. 1, if it’s in there.

Ms. Roberts said there is no reason to have it in there.

Ms. Torres said, if the wage meets, they will definitely structure the contract so there will be no reason for the HUA wage modification and it wouldn’t change anything in the contract as far as agreement amount.

Mr. Tweini asked about the number of veterans being trained in the training program.

Ms. Negron indicated that conservatively it’s between 10-15%; and that they actively seek to recruit veterans, due in part to the fact that they own Black Hawk Helicopters and Schnooks.

**ACTION:** Ms. Roberts moved and Ms. Newsom seconded the motion for approval of The proposal for Unical Aviation, Inc., in the amount of $409,500.

Motion carried 7 – 0.

**Tab #26 – Alta Vista Solutions, Inc.**

Ms. Nastari presented a proposal on behalf of Alta Vista Solutions, Inc. (AVS) in the amount of $226,200. Founded in Emeryville in 2003, AVS is a large-scale construction and quality management company with an emphasis on steel and concrete inspections. The company also develops and manufactures innovative engineering solutions such as robotic/drone assisted inspection and survey technology. Services include: site planning, blueprint/construction drawings, construction administration, and materials testing. Customers include city and local agencies, private and public developers, and government agencies. All six locations will participate in training under this proposal. AVS will apply $.22 for health benefits and not $2.50 as shown in the proposal.
Ms. Nastari introduced Bahjat Dagher, Professional Engineer and Regional Manager; and Tashiana Jackson, Project Manager.

Ms. Newsom commended them on having higher wages than what the minimum requires. Additionally, Ms. Newsom noted that this Proposal strikes her as a potential opportunity for further discussion in regards to a disabled workers program, and doing outreach to recently injured workers.

Mr. Dagher responded by explaining that one of their four recruiters focuses on veterans, disabled or otherwise.

Mr. Tweini thanked them for recruiting veterans.

Mr. Broad commended them on their high wages, particularly in regards to the lesser skilled employees.

ACTION: Ms. Newsom moved and Mr. Tweini seconded the motion for approval of the proposal for Alta Vista Solutions, Inc., in the amount of $226,200.

Motion carried, 7 - 0.

Tab #27 – Audentes Therapeutics, Inc.

Ms. Nastari presented a proposal on behalf of Audentes Therapeutics, Inc. (Audentes) in the amount of $728,000. Founded in San Francisco in 2012, Audentes is a biotechnology company that develops, manufactures, and tests gene therapy products. Audentes is among the first gene therapy companies in the U.S. to advance from research stages into trials of products that treat specific diseases. The company is dedicated to the development and commercialization of gene therapy products for rare and serious diseases such as X-linked Myotubular Myopathy, Crigler-Najjar Syndrome, Pompe disease and more.

Ms. Nastari introduced David Nagler, Sr., Vice President Human Resources and Corporate Affairs; and Steve Duscha, Duscha Advisories.

Chairman Barry Broad recused himself from this proposal.

Ms. Newsom questioned whether the wages for Job No. 1 and Job No. 2 are the same.

Mr. Nagler and Mr. Griffin indicated yes.

Mr. Tweini thanked them for their presentation, and working with veterans.

Ms. Roberts questioned and Mr. Nagler clarified that they have three sites in San Francisco and South San Francisco; one location is manufacturing, and one location is a research group.
ACTION: Mr. Tweini moved and Ms. Newsom seconded the motion for approval of the proposal for Audentes Therapeutics, Inc., in the amount of $728,000.

Motion carried, 6 - 0.

Tab #28 – Columbus Manufacturing, Inc.

Ms. Nastari presented a proposal on behalf of Columbus Manufacturing, Inc. (Columbus) in the amount of $229,580. Founded in 1917, Columbus is a food processing company specializing in salami and other prepared delicatessen meats, cheeses, and condiments. The addition of deli meats has added a new dimension to its brand name recognition and growth, at a rate of 20% a year. Customers include Costco, Trader Joe’s, Albertson’s and Safeway. ETP-Funded training will be delivered at its two facilities in Hayward; headquarters and the processing facility.

Ms. Nastari introduced Eric Schram, Manager, Learning & Development; and Shelley Moreno, Senior Associate, Consultant, RSM.

Ms. Newsom questioned how many of the approximately 200 employees in the production staff are making about $20/hr.

Mr. Schram did not know a particular percentage, but explained that they are mostly at the lower end, with a lot of workers in the mid range.

Ms. Newsom commended them in caring for and empowering their workers through the Ambassador Program and the Leadership Academy.

Mr. Tweini questioned and Mr. Schram clarified that the workers are not unionized.

Mr. Tweini questioned and Mr. Schram clarified that they promote from within when possible.

Mr. Tweini questioned whether veterans are part of their program.

Mr. Schram responded by stating that he did not have any data, but that veterans are definitely not excluded. Veterans are welcomed.

ACTION: Ms. Roberts moved and Ms. Bell seconded the motion for Approval of the proposal for Columbus Manufacturing, Inc. in the amount Of $229,580.

Motion carried 7 – 0.
Ms. Lazarewicz presented a proposal on behalf of Archer-Daniels-Midland Company (ADM), in the amount of $355,446. Founded in 1902 and headquartered in Chicago, ADM is one of the world’s largest agricultural processors and food ingredient providers. The company operates more than 270 ingredient manufacturing facilities and 500 crop procurement locations worldwide, where cereal grains and oilseeds are processed into produces used in food, beverage, nutraceutical, industrial and animal feed. Its products are used worldwide by clients such as Nestle, Danone and Trader Joe’s. ADM also provides agricultural storage and transportation services.

Ms. Lazarewicz introduced Fernanda Ethur, Human Resources Manager; and Terry Hansen, Subcontractor.

Ms. Roberts asked whether they are located in Chicago or California.

Ms. Ethur indicated that she is located in Chicago, but they have one person in Los Angeles and one in Arbuckle.

Ms. Roberts stated concerns about not having sufficient representation in California with people who understand the ETP Program.

Ms. Ethur said they have two representatives: one, Thomas Harris, our employee in Los Angeles; and the second, Mr. Caliente, in Arbuckle.

Mr. Hansen said they will also be using CMTA.

Ms. Roberts requested that they make sure that the local representation is included in the contract in the future.

Ms. Roberts questioned and Mr. Hansen clarified that Mr. Hansen was only assisting in the presentation and was not being compensated.

Ms. Roberts asked how do they communicate with the people in California.

Ms. Ethur explained they have two ways: a learning system that is already used by ADM nationwide to help control and implement the program; and training specialists that report to us in terms of quality, safety, and technical skills.

Ms. Roberts questioned and Nathan from CMTA clarified that Nathan will be assisting with the project.

Mr. Tweini thanked them for supporting unions, and asked how veterans were being incorporated into their program.

Ms. Ethur explained that they have a national veterans hiring program, and last year, they hired 228 veterans, which was almost 10% of their hiring.
ACTION: Ms. Roberts moved and Ms. Newsom seconded the motion for approval of the proposal for Archer-Daniels-Midland Company for the downsized amount of $355,446.

Motion carried 7 – 0.

Tab #30 – Bigham Services, Inc.

Ms. Lararewicz presented a proposal on behalf of Bigham Services, Inc. (Bigham) in the amount of $249,132. Founded in 1990 and headquartered in Santa Rosa, Bigham provides air conditioning, heating, ventilation, electrical, and repair diagnostic services to residential homeowners and tenants. Bigham operates within the residential HVAC, electrical, and solar segment. Training will take place at Bigham’s locations in Santa Rosa and Concord. This is Bigham’s first ETP Agreement.

Ms. Lararewicz introduced Gene Davis, Sales Manager; and Jill Meeuwsen, Subcontractor.

Mr. Newsom questioned and Mr. Davis clarified that the electrical components are being done by certified electricians.

Mr. Tweini thanked him for working with veterans and green technology.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for Bigham Services, Inc. in the amount of $249,132.

Motion carried 7 – 0.

Tab #31 – Esurance Insurance Services, Inc.

Ms. Lararewicz presented a proposal on behalf of Esurance Insurance Services, Inc. (Esurance) in the amount of $240,248. Founded in 1998 and headquartered in San Francisco, Esurance is a subsidiary of the Allstate Corporate and provides personal auto, homeowner, renters and motorcycle insurance directly to consumers online and through select online agents nationwide. The company has three locations, however, only its San Francisco and Rocklin locations will be participating in training.

Ms. Lararewicz introduced Gabriel Urrea, Director – Corporate Learning.

Mr. Urrea addressed the issue of veterans by noting that they have a large internal program called E-Vets, which seeks to recruit veterans.

Ms. Roberts explained that they are non-priority industry; that this is their fourth contract; and that they need to figure out how to train their employees using their own money. Ms. Roberts also explained that her issue is not particularly focused on job creation, but rather retraining.
Mr. Urrea indicated that he understood Ms. Roberts’ concerns; and further explained that their training is not focused on just customer service, but also includes training in regards to WebEx, Adobe Connect, Skype for Business, and other areas.

Ms. Roberts questioned whether at this point their training program should be able to stand on its own two feet without ETP Funding.

Mr. Urrea explained that they spend about $4M in training; that they are doing their fair share to stand alone the best they can; but that ETP Funding is still needed in certain areas.

Ms. Roberts acknowledged Mr. Urrea’s comments, but indicated that she would like some Panel discussion, since it appears these proposals are merely retraining a similar population over and over again on different types of software over the last six or seven years.

Mr. Broad indicated that there are some things that the Panel can do, such as voting to approve the proposal; not voting to approve the proposal; imposing a substantial contribution requirement; especially when it looks like ETP Funding is becoming a supplemental part of their training budget. Mr. Broad asked for any motions.

Ms. Newsom asked the Executive Director whether, under the new broker model being suggested, this would create a 2-year wait requirement.

Mr. Knox indicated yes, but that the Panel still has the ability to impose a substantial contribution on a case-by-case basis; so the Panel could recommend a 20% reduction, 25% reduction of the current contract, and then wait 2-3 years to see what that goes.

Ms. Newsom stated that she looks forward to a motion on this Proposal, but wanted to stress the point that if they come back for more ETP Funding, that the Proposal should focus on how the proposal is bettering the employees and not the company.

Ms. Roberts proposed a substantial contribution to reduce the amount by 25%.

ACTION: Ms. Roberts moved and Ms. Bell seconded the motion for approval of the proposal for Esurance Insurance Services, Inc., with a substantial contribution to be reduced by 25% in the amount of $180,186. Motion carried  7 – 0.

Tab #32 – LiDestri Foods, Inc.

Ms. Lararewicz presented a proposal on behalf of LiDestri Foods, Inc. (LiDestri) in the amount of $468,910. Founded in 1981 and headquartered in Fresno, LiDestri specializes in manufacturing and processing beverages and tomato-based products (red sauces, dips, BBQ sauces, salsas, and retort processed products). LiDestri also manufactures and co-pack products for domestic private labels, such as Paul Newman’s Own and Francesco Renaldi. Training will take place in the company’s Fresno facility.

Ms. Lararewicz introduced Patricia Trudeau, CI Manager.
Ms. Roberts inquired about their company, and Mr. Trudeau explained that they are headquartered in New York, but have 200+ employees in Fresno.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for LiDestri Foods, Inc., in the amount of $468,910.

Motion carried 7 – 0.

Tab #33 – Mary Ann’s Baking Co., Inc.

Ms. Lararewicz presented a proposal on behalf of Mary Ann’s Baking Co., Inc. (Mary Ann’s) in the amount of $400,920. Founded in 1961 and headquartered in Sacramento, Mary Ann’s produces a variety of fried and baked products for distribution in the continental United States and Hawaii. Products are transported and distributed both fresh and frozen. Mary Ann’s customers including Aldi’s, Albertson’s, DOT Foods, Grocery Outlet, and Kroger.

Ms. Lararewicz introduced Mark Salerno, Program Manager; and Cheryl Moore, Human Resources.

Mr. Broad questioned and Ms. Moore explained that they are adding 137 new employees, which is almost doubling their workforce.

Ms. Roberts asked and Ms. Moore noted that their next step will be looking into expanding their facility.

Mr. Broad questioned and Ms. Moore clarified that all of the trainees are new employees.

Mr. Broad questioned and Ms. Moore explained that the people in Job No. 1 are training the people in Job No. 2.

Ms. Roberts stated that she appreciated the 88% success rate, but indicated that 100% would be better.

Ms. Newsom noted that the wage range is between $11 - $17.20/hr, and asked how many are getting paid at the minimum wage and the higher wage?

Ms. Moore explained it would be in the higher range because there are a lot of bakeries that have shut down, and they are getting those workers with more experience. Ms. Moore then explained that the wages progress as they stay on with them.

ACTION: Ms. Roberts moved and Ms. Newsom seconded the motion for approval of the proposal for Mary Ann’s Baking Co., Inc., in the amount of $400,920.

Motion carried, 7 - 0.
Multiple Employer Contracts

Ms. Roberts expressed her thanks toward ETP Staff in bringing in new clientele, as Ms. Roberts noted that 50% of the proposals, both in single employers and consent calendar, were all new contracts.

Tab #34 – Apprentice & Journeymen Training Trust Fund of the Southern California Plumbing and Piping Industry

Mr. Griffin presented a proposal on behalf of Apprentice & Journeymen Training Trust Fund of the Southern California Plumbing and Piping Industry (P&P Trust) in the amount of $949,428. Founded in 1959, P&P Trust provides training for workers in the plumbing and pipefitting industry. The Trust was established by unions and contractors and is governed by a joint labor-management committee. The Trust operates a total of nine training centers for the plumbing and piping industry in Southern California.

Mr. Griffin introduced Ray LeVangie, III, Executive Director; Oscar Meyer from the L.A. Unified School District; and Steve Duscha.

No questions from the Panel.

ACTION: Ms. Newsom moved and Ms. Bell seconded the motion for approval of the proposal for Apprentice & Journeymen Training Trust Fund of the Southern California Plumbing and Piping Industry in the amount of $949,428.

Motion carried, 7 - 0.

Tab #35 – Bricklayers & Allied Craftworkers Local #4 California Joint Apprenticeship Committee

Mr. Griffin presented a proposal on behalf of Bricklayers & Allied Craftworkers Local #4 California Joint Apprenticeship Committee (Brickmasons JAC) in the amount of $230,725. Brickmasons JAC is located in the City of Arcadia, sponsors a training program for Southern California Brickmasons through its JAC.

Training at the Arcadia location is provided to Apprentice and Journeymen in the Brickmason trade. Bricklayers JAC currently trains approximately 480 Journeymen and 100 Apprentices. Those who successfully complete the program become bricklayers, craft workers, stone and marble masons, cement masons, plasters, tile setters, terrazzo and mosaic workers, cleaners/caulkers, and pointers. This will be the third ETP Agreement with Bricklayers JAC, and third within five years.
Mr. Griffin introduced Robert Kay, Director of Training and Steve Duscha.

No questions from the Panel.

ACTION: Mr. Tweini moved and Ms. Newsom seconded the motion for approval of the proposal for Bricklayers & Allied Craftworkers Local #4 California Joint Apprenticeship Committee in the amount of $230,725.

Motion carried 7-0.

Tab #36 – Laborers Training and Retraining Trust Fund for Southern California

Mr. Griffin presented a proposal on behalf of Laborers Training and Retraining Trust Fund for Southern California (SoCal Laborers) in the amount of $938,666. Founded in 1970, the SoCal Laborers funds training for three separate Apprenticeship Programs, two of which will participate in this proposal: Laborers Southern California JAC and Southern California Laborers Landscape and Irrigation Fitters JAC. So Cal Laborers serves eight Southern California Locals (89, 220, 300, 585, 652, 783, 1309, and 1184) in 12 counties. The school currently has 1,924 Apprentices enrolled. This will be the JATC’s sixth ETP Agreement and fifth within five years.

Mr. Griffin introduced Martin De La Cruz, Marketing/Special Operations Manager.

No questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Newsom seconded the motion for approval of the proposal for Laborers Training and Retraining Trust Fund for Southern California in the amount of $938,666.

Motion carried, 7 - 0.

Tab #37 – El Camino Community College District, Center for Applied Competitive Technologies

Ms. Torres presented a proposal on behalf of El Camino Community College District, Center for Applied Competitive Technologies (El Camino CATC) in the amount of $949,648. Founded in 1946, El Camino CATC is a two-year community college offering academic and vocational education programs. The district established El Camino CATC to advance California’s economic growth and global competitiveness through education, training, and services that contribute to continuous workforce development, technology deployment, and business development. Located in Hawthorne, El Camino CATC provides customized training, workshops, and technical assistance to employers.

Ms. Torres introduced Eldon Davidson, Director for Center for Customized Training.

No questions from the Panel.
ACTION: Mr. Tweini moved and Ms. Newsom seconded the motion for approval of the proposal for El Camino Community College District, Center for Applied Competitive Technologies in the amount of $949,648.

Motion carried, 7 - 0.

Tab #38 – Professionals in Human Resources Association

Ms. Torres presented a proposal on behalf of Professionals in Human Resources Association (PIHRA) in the amount of $949,616. Established in 1944, PIHRA is headquartered in Gardena and 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. PIHRA is the largest affiliate of the Society for Human Resources Management Organization.

Ms. Torres introduced Brian Allain, Deputy Executive Director; and Deborah Imonti, of DLI & Associates.

No questions from the Panel.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for Professionals in Human Resources Association in the amount of $949,616.

Motion carried, 7 - 0.

Tab #39 – City and County of San Francisco

Ms. Nastari presented a proposal on behalf of the City and County of San Francisco (City of SF) in the amount of $592,640. 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 fifth ETP Agreement, and the third within the last five years.

Ms. Nastari introduced Holly Muala, S.F. Mayor’s Office of Economic and Workforce Development; and Steve Duscha.

Ms. Newsom inquired about any outreach activities in order to promote women in the construction trades, and Ms. Muala explained that part of her team is focused on promoting women, especially in certain districts, such as the Bay View District and Mission District. Ms. Muala also noted that they actually graduated 4 women in their last class, and they went on to become carpenters and went straight to work.
ACTION: Ms. Newsom moved and Mr. Tweini seconded the motion for approval of the proposal for City and County of San Francisco in the amount of $592,640.

Motion carried, 7 - 0.

Tab #40 – JATC Plumbing and Pipe Fitting Industry of San Mateo County

Ms. Nastari presented a proposal on behalf of Joint Apprenticeship and Training Committee of the Plumbing and Pipe Fitting Industry of San Mateo County (Plumbers JATC San Mateo) in the amount of $556,832. The JATC was formalized in 1955 with the establishment of the Pipe Trades Apprentice and Journeyman Training Trust and a Training Center located in Burlingame. The Fund is governed by a Board of Trustees comprised of six labor and six management representatives. The JATC and Trust are formed under collective bargaining between the UA Local 467 and the Plumbing-Heating-Cooling Contractors Association of the Greater Bay Area.

Participating employers are located in South San Francisco (including the San Francisco Airport) to East Palo Alto. These companies are primarily building and plumbing contractors. They employ 161 Apprentices and 791 Journeymen in heavy industrial, manufacturing, commercial and residential sectors. Approximately 60% of the signatory employers meet the Panel’s definition of a small business.

Ms. Nastari introduced Robert Kay, Training Director; and Jan Borunda, Cal Labor Fed.

Ms. Nastari noted that there was a special request by the JATC to lower the minimum hours delivered to 4 hours instead of a 8 hours required by the ETP Program.

In discussion, it was determined that Mr. Kay was asked to raise and discuss the issue of delivering a 4-hour training with the Panel today, but that said 4-hour training is not actually included in the current Proposal before the Panel. In fact, the intent was to raise the issue of making a special request for 4-hour training with the Panel, knowing that this issue will likely come up later with this project by way of a future amendment, as well as other projects.

Mr. Board explained the accounting complexities raised with the issue, and stated that he thinks that this needs to be spelled out in such proposals; i.e., how much money is being requested for any 4-hour training.

Ms. Roberts expressed concern that this opens the door, and does not want to set precedence at 4 hours, so that the next time they ask for a special determination for delivering 2-hour training. Ms. Roberts explained it used to be 24; now it’s 8; and they are now asking it be lowered to 4.
Mr. Broad clarified that the Panel is not being asked to approve 4-hour training with this Proposal, but indicated that if they come back to request such an amendment, that they should literally separate the number by showing how much money is being asked for this 4-hour training.

Mr. Knox indicated that the Panel will likely see other applications asking for 4-hour training in the future, but that they will be broken down by job number, so the Panel will be able to see the breakdown in those proposals.

Ms. Roberts clarified that the Panel is not approving a special request for 4-hour training with this current Proposal.

Mr. Knox agreed and stated that any special request for 4-hour training herein would be by way of an amendment; to which Mr. Broad stated that we can deal with the issue at that time.

Ms. Newsom stated that she was appreciative of efforts made to benefit the workers through new technologies and policy changes.

**ACTION:** Ms. Roberts moved and Ms. Newsom seconded the motion for approval of the proposal for JATC Plumbing and Pipe Fitting Industry of San Mateo County in the amount of $556,832.

Motion carried, 7 – 0.

**Tab #41 – Northern California Heat & Frost Insulators and Allied Workers Joint Apprenticeship and Training Committee**

Ms. Nastari presented a proposal on behalf of Northern California Heat & Frost Insulators and Allied Workers Joint Apprenticeship and Training Committee (Insulators JATC) in the amount of $646,720. Founded in 1961, Insulators JATC administers the apprenticeship program created in collective bargaining between representatives from Local 16 and the Western Insulation Contractors Association. The JATC operates a state-of-the-art training center in Benicia serving workers and employers in 47 Northern California counties. This will be Insulators JATC fourth ETP Agreement and the fourth in the last five years.

Ms. Nastari introduced Bill Hodges, Apprenticeship Coordinator/President; and Steve Duscha.

No questions from the Panel.

**ACTION:** Ms. Roberts moved and Ms. Newsom seconded the motion for approval of the proposal for Northern California Heat & Frost Insulators and Allied Workers Joint Apprenticeship and Training Committee in the amount of $646,720.

Motion carried, 7 – 0.
Tab #42 – California Workforce Association

Ms. Lararewicz presented a proposal on behalf of California Workforce Association (CWA) in the amount of $949,932. Established in 1998, CWA is a non-profit member association representing all 45 Workforce Development Boards in the State of California. They also represent over 70 other members from labor, education, industry, chambers of commerce, government, and community-based organizations involved in training, education, economic development, welfare and employment, and other workforce development partners. This will be CWA’s fifth ETP funded project and the third in the last five years.

Ms. Lararewicz introduced Brandon Anderson, Program Manager; and Steve Duscha, Duscha Advisories.

No questions from the Panel.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for California Workforce Association in the amount of $949,932.

Motion carried, 7 – 0.

XI. PRESENTATION FROM LIS TESTA – STRATEGIC PLAN

Ms. Testa presented the Strategic Plan to the Panel, and expressed her thanks to ETP Staff for updating the design and layout of the Strategic Plan.

Ms. Testa then presented an overview of the Table of Contents as follows:

Section A: Vision and Mission Statements.

Vision: ETP’s vision is that the Employment Training Panel will support economic development in California through strategic partnerships with business, labor and governments.

Mission Statements: ETP provides financial assistance to California businesses to support customized worker training to:

- Attract and retain businesses contributing to a healthy California economy;
- Provide workers secure jobs paying good wages and have opportunities for advancement;
- Assist employers to successfully compete in the global economy; and,
- Promote the benefits and ongoing investment in employee training among employers.

Section B: Introduction/Overview

Introduction: Fulfilling Its Mission
• Gives a brief history of ETP, and describes ways we meet our mission statements.
• Contains overall figures of ETP’s performance since our founding.
• Points readers to our Annual Reports for additional information.

Overview of the Organization
• Gives a description of where ETP fits in the overall Labor & Workforce Development Agency environment.
• Lays out the make-up of Panel.

Section C: Goals & Objectives

Outlines six (6) main goals of ETP:
1. Enhance the visibility of the program through connections with LWDA, GO-Biz, and other public and private agencies and legislators.
2. Target California’s key industries.
3. Continue support for small businesses through outreach and specialized contract formats.
4. Support Governor’s initiatives and hard-to-serve populations including: veterans, injured and disabled workers, businesses in high unemployment areas, workers with barriers to employment, apprenticeships, women in non-traditional fields, green technology, and industry recognized credentials.
5. Enhance ETP’s impact on job creation and retention by utilizing our Retraineer-Job Creation program and through collaboration with GO-Biz.
6. Increase efficiency and effectiveness of the ETP program with internal program reviews, coordinating our services with other labor agencies, building a new data management system, and by utilizing our funding caps and allocations.

Section D: Improvements & Funding

• Introduces five (5) policies and approaches that ETP uses to maximize program efficiencies:
• 1) Process Improvement & Simplification: ETP has begun a process of comprehensively reviewing our policies with the goal of improving our processes and simplifying the more complicated areas of the program.
  ❖ In Progress Items: Regions, Non-Traditional Apprenticeships, Comprehensive Review of Legislation/Regulations, Review of Pilots/Guidelines
• 2) Funding Caps:
  ❖ MECs over $950,000 must wait 18 months from the start of their contract term before submitting a second preliminary application.
• 3) Funding Allocations
  MECs $ 24,000,000
  Single Employers $ 48,000,000
Small Business $  6,000,000
Critical Proposals $  5,000,000
Apprenticeships/ Non-Traditional $ 20,000,000
TOTAL $103,000,000

4) Lowest Funding Priorities:
   - Commission sales in the retail trade, multi-level marketing, training for employees or training agencies, adult entertainment, gambling, mortgage banking, car dealerships, truck driving schools, and partners in professionals firms.

5) Other Limitations:
   - Repeat Contractor Rule.
   - Support Costs for MECs default to highest percentage (8% retrainee training, 12% new hire training).
   - Employer Demand in MECs (60% with at least 80% prior performance, 80% with less than 80% prior performance).
   - Training Vendors in a MEC may only provide up to 50% of the training

E. Priority Industries
   - Lists Our Priority Industries:
     - Agriculture
     - Allied Healthcare
     - Biotechnology & Life Sciences
     - Construction
     - Goods Movement & Transportation Logistics
     - Green/Clean Technology
     - Information Technology Services
     - Manufacturing/Food Production
     - Multimedia/Entertainment
     - Technical Services
   - Visual of the percentage of ETP funding earned per industry

F. Labor Force Priority Populations
   - Briefly describes eight (8) labor force populations that are given ETP priority:
     - Critical Proposals
     - New Hires & Retrainees-Job Creation
     - Small Businesses
     - Veterans
     - Pre-Apprentices, Apprentices, and Journeymen
     - Medical Skills and Certified Nursing Assistant to Licensed Vocational Nurse Training
     - Alternately Funded Projects
     - Ex-Offenders/At-Risk Youth

G. Key Strategies, Initiatives, & Partnerships
   - Describes four (4) strategies that help the ETP to meet our mission and program objectives, including:
Strategic Partnerships with the Labor & Workforce Development Agency, GO-Biz, California Workforce Development Boards, the California Energy Commission, and others;
• The Apprenticeship Training Program, which in its first six (6) years has approved over $73M for 157 contracts to train over 44,000 individuals;
• A partnership through the Workforce Innovation & Opportunity Act (WIOA) Implementation Workgroup;
• Continuing to fund projects in California’s High Unemployment Areas.

Appendices

Appendix A: Provides descriptions of all ETP’s Priority Industries
Appendix B: Describes one of ETP’s alternative funding sources and programs – the Alternative & Renewable Fuel & Vehicle Technology Program.

Ms. Testa noted, under Section C (Goals & Objectives), that Staff would like to include workforce training for prisoners leaving prison, so that they can enter the workforce and lower recidivism rates.

Mr. Broad asked for any objections from the Panel, and hearing none, stated that the Strategic Plan should be considered with said addition.

ACTION: Ms. Newsom moved and Mr. Tweini seconded approval of the Strategic Plan for fiscal year 2018/2019.

XII. ANNOUNCEMENTS

Diana Torres announced that after 32 years of dedicated state service, Joe Davey is retiring. ETP thanked Mr. Davey for his service, and congratulated and wished Mr. Davey well in his retirement.

Anna Nastari announced that after 33 years of dedicated state service, Lily Lai is retiring. Ms. Lai began as an OT working her way up to AGPA. She has been ETP’s top performer in both Development and Monitoring and has been a huge part of training in the San Francisco/Bay Area Regional Office. ETP thanked Ms. Lai for her service, and congratulated and wished Ms. Lai well in her retirement.

XIII. GENERAL PUBLIC COMMENT

A. K. Thakore, President of Saisoft, provided a presentation and update to the Panel regarding his recent purchase of Professional Career Development Center; his apologies for engaging in any past actions that may have upset the Panel; and his plans for the future.

Mr. Broad expressed thanks on behalf of the Panel; indicated that Mr. Thakore’s future intentions appear to be a much better fit with the ETP Program; that there was never anything personal; and Mr. Broad finished by personally thanking Mr. Thakore for his presentation.
Phillip Herrera of Herrera & Associates provided a handout about a 2018 Talent Integration – California Workforce Trends in the Life Science Industry publication by the California Life Science Association. The full report will be sent to Robert Meyer, for forwarding to the Panel Members.

XIII. MEETING ADJOURNMENT

Meeting adjourned at 12:20 p.m.
**Single Employer Contractor**

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

- Unless funded under Special Employment Training (SET), a single employer must face out-of-state competition.

- A single employer must be subject to the Employment Training Tax.

- The employer must also make an “in kind” contribution toward the cost of training, as follows: 1) 100 or fewer employees, at least 50% of the ETP-funded amount; 2) more than 100 employees, at least 100% of the ETP-funded amount.

- The employer must provide union letters of support for employees who are represented. The employer should also be able to show how the training will enhance job security and improve opportunities for advancement.

- A single employer must establish the need for the particular training curriculum proposed.

- The employer must establish its ongoing commitment to training and represent that ETP funds will not displace existing resources.

- All single employer contracts are capped at $900,000.

These features apply to core program funding.
Multiple Employer Contractor

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

- Up to 8% of program costs may be approved as additional funding for recruitment, placement and assessment activities. For New Hire training, the MEC may receive up to another 4% (total 12%). These costs must be justified.

- The project may be retraining or new hire training, or a combination of both. Training may take place at the worksite or a training center, or both.

- All MECs are capped at $950,000/$1.8M*

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

Retraining

- Training hours for retrainees are capped at 200. The Panel may modify this cap for good cause on a case-by-case basis.

- The MEC must provide union letters of support for represented employees.

- The MEC must make an “in kind” contribution toward the cost of training, of at least 50% of the ETP-funded amount. These contributions may consist of:
  1) wages/benefits paid during training by participating employers;
  2) development, recruitment, placement, and assessment costs; and,
  3) facility and material expenses.

- The MEC must provide a list of participating employers to demonstrate actual employer demand for the occupational skills in the curriculum.

- The MEC must have a core group of participating employers for at least 80% of the training plan.

- Participating employers must be subject to the Employment Training Tax.

- Participating employers must demonstrate an ongoing commitment to training, and represent that ETP funds will not displace existing resources.

New Hire Training

- Training hours are capped at 260. The Panel may modify this cap for good cause on a case-by-case basis.

- The MEC must have a plan for recruiting trainees and participating employers. As part of this plan, the MEC must have an advisory board of participating employers qualified to provide guidance on needed occupational skills.

- Training must be for job-related skills that apply to specific occupations in a given industry or to specialized occupations across an industry spectrum.

- For all occupations, the MEC should be able to show a statewide or local shortage of skilled workers.

These features apply to core program funding.

June 14, 2018
Delegation Order Process

- The Panel has delegated authority to the Executive Director, without consultation with the Panel Chair, to approve (1) small business (100 or fewer employees) for $75,000 or less, and (2) single proposals for $75,000 or less.

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

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

- A copy of approved Delegation Orders is included in each month’s Panel Packet, for projects approved prior to the Panel meeting, as an information item.
RETRAINEE - JOB CREATION
Training Proposal for:
Baloian Packing Co., Inc.
Agreement Number: ET19-0158

Panel Meeting of: July 27, 2018
ETP Regional Office: Sacramento
Analyst: D. Jordan

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
<th>Job Creation Initiative</th>
<th>HUA</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industry Sector(s):</td>
<td></td>
<td></td>
<td>Wholesale Trade</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Agriculture</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>Fresno</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>Number of Employees in: CA: 190</td>
<td>U.S.:190</td>
<td>Worldwide: 190</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>6%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>(0% of total trainees)</td>
<td>0%</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>$99,970</td>
<td>$0</td>
<td>$0</td>
<td>$99,970</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $105,000
### 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</td>
<td>Business Skills, Computer Skills, Continuous Improvement Skills, Manufacturing, PL-Manufacturing</td>
<td>175</td>
<td>8-200 0</td>
<td>$546</td>
<td>*$12.53</td>
</tr>
<tr>
<td></td>
<td>Priority Rate HUA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainees</td>
<td>Business Skills, Computer Skills, Continuous Improvement Skills, Manufacturing, PL-Mfg Skills</td>
<td>5</td>
<td>8-200 0</td>
<td>$884</td>
<td>*$11.00</td>
</tr>
<tr>
<td></td>
<td>Job Creation Initiative Priority Rate HUA</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.

**Minimum Wage by County:** Priority/HUA/Retrainees (Job Number 1): $12.53 per hour in Fresno County; Priority/HUA/Job Creation (Job Number 2): $11.00 per hour 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 Up to $1.53 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>Administrative Staff</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Production Workers</td>
<td>116</td>
<td></td>
</tr>
<tr>
<td>Support Staff</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Production Workers</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1923 and headquartered in Fresno, Baloian Packing Co., Inc. (Baloian) (www.baloianfarms.com), is a fourth generation, family-owned company that grows, packs, and ships fresh produce. Products include bell peppers, onions, lettuce, eggplant, cucumbers, green beans, yams and beets and are branded as Pam Pak and Baloian Farms. Customers include wholesale distributors and grocery and produce retailers throughout the United States. Training will take place at Baloian’s two locations in Fresno. This will be the Company’s first ETP-funded Agreement.

PROJECT DETAILS

Industry competitors are producing high quality products at reduced prices. To compete, Baloian must improve production processes, delivery times, and efficiencies. Staff will be cross-trained on production equipment: Sorting Systems, Equipment Drive Systems, Labeling Systems, Control Systems and Inventory and Raw Materials.

Additionally, training will cover process improvement and soft skills. Training on computer software, including Intermediate/Advance Microsoft Office, IT Infrastructure, Edict Systems, Famous and iTrade will allow the Company to track production and packaging in real-time. Soft skills will improve internal communications and customer service to build client relationships.

Retraineer - Job Creation

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

Baloian will be expanding business capacity by hiring new employees. Adding new employees will ensure the Company continues meeting customer demand and providing excellent customer service. The Company has committed to hiring five trainees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Training will be delivered via Class/Lab and Productive Lab (PL) in the following:

**Business Skills:** Training will be delivered to all occupations. Training will improve internal communication and team work and enhance client relationships by delivering excellent customer service. Training topics will include Business Processes, Communication Skills, Problem Solving and Goal Setting.

**Continuous Improvement Skills:** Training will be delivered to all occupations. Training will improve productivity and reduce waste. Training topics will include Critical Thinking, Process Improvement, Leadership Skills, and Supply Chain Management.

**Computer Skills:** Training will be delivered to all occupations. Training will give the Company an improved real-time tracking of production and packaging operations. Training topics will include Intermediate/Advanced Microsoft Office, Internal Customer Applications, Computerized Inventory, and IT Infrastructure.

**Manufacturing Skills:** Training will be delivered to Maintenance Staff and Production Workers. Training will focus on cross-training staff on control systems, equipment maintenance, repair, set-up, testing and good manufacturing practices. Training will increase productivity and increase profitability. Topics include Case Packer, Food Safety, Equipment Drive Systems, Sorting Systems, Labeling Systems, and Inventory and Raw Materials Training.
Productive Laboratory

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

PL training will be delivered to Maintenance Staff and Production Workers in Manufacturing Skills. Trainers will demonstrate step-by-step instructions and then observe while trainees perform the tasks. Training will consist of courses in Maintenance Equipment, Packing Equipment, Processing Equipment, and Sorting Equipment. Production will be affected and more materials will be wasted due to the trial and error process. Baloian will provide approximately 40 hours of PL-Manufacturing skills training at a 1:3 trainer-to-trainee ratio. Baloian is requesting a 1:3 ratio since some machines require a three-person team to operate.

Commitment to Training

Baloian allocates approximately $101,000 annually for training that includes new-hire orientation, staff development and safety 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.

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

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

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

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

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

**BUSINESS SKILLS**
- Accounting Skills
- Business Processes
- Coaching
- Communication Skills
- Goal Setting
- Problem Solving
- Supervisor Training

**COMPUTER SKILLS**
- Edict Systems
- Famous
- iTrade
- IT Infrastructure
- Microsoft Office (Intermediate and Advanced)

**CONTINUOUS IMPROVEMENT**
- Critical Thinking
- Kaizen Events
- Leadership Skills
- Measuring for Success
- Problem Solving and Resolution
- Process Improvement
- Supply Chain Management
- Team Building

**MANUFACTURING SKILLS**
- Case Packer
- Compliance Tracking
- Control Systems
- Equipment Cross-Training
- Equipment Drive Systems
- Equipment Maintenance/Repair Skills
- Equipment Set-Up and Testing
- Food Safety
- Forklift Skills
- Good Manufacturing Practices
- Inventory & Raw Materials Training
- Labeling Systems
- Safety Leadership
- Sorting Systems
- Standard Operating Procedures
- Welding Skills
**PL Hours**
0 – 40  
Trainees may receive any of the following:

**MANUFACTURING SKILLS** (1:3 Ratio)
- Maintenance Equipment
- Packing Equipment
- Processing Equipment
- Sorting Equipment

**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.
Training Proposal for:

Bell-Carter Foods, Inc.

Agreement Number: ET19-0161

Panel Meeting of: July 27, 2018

ETP Regional Office: San Francisco Bay Area    Analyst: S. Wang

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
<th>HUA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td></td>
<td></td>
<td>Manufacturing</td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Contra Costa, Stanislaus, Tehama</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>
</tbody>
</table>


Turnover Rate: 8%

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>$169,442</td>
<td>$0</td>
<td>$0</td>
<td>$169,442</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $260,680
**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>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraining</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Mfg Skills</td>
<td>36</td>
<td>8-200</td>
<td>0</td>
<td>$494</td>
</tr>
<tr>
<td>2</td>
<td>Retraining</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Mfg Skills</td>
<td>307</td>
<td>8-200</td>
<td>0</td>
<td>$494</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: $18.22 for Contra Costa County, Job Number 2: $12.53 for Tehama and Stanislaus County

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

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

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 1 (Walnut Creek)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finance/ Admin</td>
<td></td>
<td>11</td>
</tr>
<tr>
<td>Finance/ Admin Leads</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>IT</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>IT Leads</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Sales/Marketing</td>
<td></td>
<td>9</td>
</tr>
<tr>
<td>Sales/Marketing Leads</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td><strong>Job 2 (HUA: Corning and Modesto)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operations Leads</td>
<td></td>
<td>24</td>
</tr>
<tr>
<td>Operations Staff</td>
<td></td>
<td>40</td>
</tr>
<tr>
<td>Production Leads</td>
<td></td>
<td>14</td>
</tr>
<tr>
<td>Production Staff</td>
<td></td>
<td>229</td>
</tr>
</tbody>
</table>

Minimum Wage by County: Job Number 1: $18.22 for Contra Costa County, Job Number 2: $12.53 for Tehama and Stanislaus County

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

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

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

Founded in 1912 as a subsidiary of Bell-Carter Olive Packaging Company, Inc., Bell-Carter Foods, Inc. (Bell-Carter) (http://www.bellcarter.com/) is a family-operated olive company that produces, sells, and markets products to customers across the United States under Private Label Olives and Lindsay Olives Brand. Products can be found in major retailers such as Costco, Wal-Mart, and Safeway. The Company has three locations in California that will be participating in training: headquarters in Walnut Creek, a food packaging and fulfillment services office in Modesto, and a manufacturing office in Corning.

In addition to its olive business, Bell-Carter offers a variety of convenience and marketing solutions, from food handling (such as mixing to create pancake mix and trail mix snacks) to ongoing packaging (such as bulk bag filling, flexible pouch filling, and gifting) through its Total Fulfillment Services (TFS). Products manufactured through the TFS are stored at the Company’s warehouses. Customers using the fulfillment services include Frito-Lays, Ghirardelli Chocolates, Navitas Organics, Birch Benders Pancake Mix, Danoe/White Wave, Viva Naturals, and Alter Eco.

PROJECT DETAILS

Bell-Carter must provide workforce training to manage business growth. Training will address new products, services, distribution, and consumer communication. The Company recently launched two product lines under Lindsay Olive Brand: Lindsay Naturals, using all-natural ingredients, and Lindsay Recloseables, a re-sealable bowl and pouch for an on-the-go snack. The Company also released additional products such as almond butter and extra virgin olive oil products. Processes and operation procedures must be upgraded. The Company will also be improving infrastructure, including purchasing new automation systems and equipment.

Training Plan

To meet business growth and infrastructure changes, the following types of training and courses will be delivered:

**Business Skills** (20%): Courses include Product Knowledge, Leadership Skills, Collaboration, Conflict Resolution, Problem Solving, and Time Management.

**Computer Skills** (30%): Courses include Human Resource Information System (HRIS) Applications, Intermediate and Advanced Microsoft Office, Technical JDE (JD Edwards), and Microsoft Power BI (Business Intelligence).

**Continuous Improvement** (10%): Courses include Six Sigma, Quality Control and Assurance, and Safe Quality Food (SQF).

**Manufacturing Skills** (40%): Courses include Forklift Certification, Pallet Jack certification, Load Hog Certification, Equipment Operation, and Safety Training.

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.
Training Infrastructure

Bell-Carter is ready to start training upon approval. Training will be provided by in-house staff. Team Leads, HR and Management staff will be responsible for scheduling and conducting training. The Company has designated a representative in each location to facilitate training. The Company also retained RSM US LLP to assist with administrative duties.

High Unemployment Area

Trainees work in Tehama and Stanislaus Counties (Job Number 2) work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. These trainees qualify for the reduced Standard Wage which is 25% below the Standard Wage (from $16.70 per hour to $12.53 per hour).

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Bell-Carter retained RSM US LLP in Los Angeles to assist with development of this proposal for a flat fee of $7,500.

ADMINISTRATIVE SERVICES

Bell-Carter also retained RSM US LLP to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

BUSINESS SKILLS
- Accounting and Finance
- Product Knowledge
- Emotional Intelligence
- Communication
- Project Management
- Time Management
- Conflict Management
- Problem Solving
- Organization
- Collaboration
- Decision Making
- Leadership Skills
- Change Management
- Meeting Management
- Planning
- Team Building

COMPUTER SKILLS
- Human Resource Information System (HRIS) Applications
- Intermediate & Advanced Microsoft Office
- Technical JDE (JD Edwards)
- Microsoft Power BI (Business Intelligence)

CONTINUOUS IMPROVEMENT
- 5 Why Analysis (Six Sigma)
- Quality Control/Quality Assurance
- Safe Quality Food
- Good to Great (Best Business Practices)
- Supply Chain

MANUFACTURING SKILLS
- Forklift Certification
- Pallet Jack Certification
- Load Hog Certification
- Safety Training
- Equipment Operation
- Automation
- Warehousing
- Packing
- Fulfillment
- Mixing
- Storage
- Grading
- Pitting

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.
Training Proposal for:
Boudreau Pipeline Corporation
Agreement Number: ET19-0149

Panel Meeting of: July 27, 2018
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>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>✗ Yes ☐ No</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Riverside</td>
<td>Repeat Contractor:</td>
<td>✗ Yes ☐ No</td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>☐ Yes</td>
<td>☒ No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 261</td>
<td>U.S.:261</td>
<td>Worldwide: 261</td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>13%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>(6% 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>$103,532</td>
<td>$0</td>
<td>$0</td>
<td>$103,532</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $218,000
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 Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Improv., OHSA 10/30, PL - Comm. Skills</td>
<td>181</td>
<td>8 - 200</td>
<td>0 - 100</td>
<td>$572</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $16.70 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 $0.70 per hour may be used to meet the Post-Retention Wage.

<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>26</td>
<td></td>
</tr>
<tr>
<td>Foreman</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>Superintendent</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Project Manager</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Estimator</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Laborer</td>
<td>119</td>
<td></td>
</tr>
</tbody>
</table>

**Wage Range by Occupation**

**INTRODUCTION**

Founded in 1996, Boudreau Pipeline Corporation (Boudreau) (http://www.boudreaupipeline.com) is a wet utility construction company that installs sewers, water and fire lines, and storm drain systems across California. The Company specializes in highly complex pipeline projects for builders, municipalities, utilities and contractors. The Company operates out of a single facility in Corona, the site of the proposed training.

**PROJECT DETAILS**

This will be Boudreau’s second ETP project within 5 years. The first project focused primarily on training field staff to ensure laborers had the necessary skills for ditch digging and pipe laying and performing efficiently and safely on the job.

This proposal will focus on more complex training and cross-training. Training assessments revealed field staff needed to work outside of their area of expertise, in alternate roles. Training will help fill the skills gap of field staff. In addition, the Company piloted a Mobile Home Parks Division (MHPD) in 2017 and implemented the division as a part of its normal business operations.
MHPD requires more skills in specific gas and electric needs (only one crew is currently trained). Further, Boudreau purchased a heavy equipment simulator in 2017. This simulator is a training tool which provides a realistic experience for field staff operating equipment. It combines authentic controls with applications to teach the trainees the same techniques that will be found on the worksite.

Boudreau will also train Office and Administrative Staff. Training will focus on a newly created leadership program implemented to promote staff. The Company will also implement new internal software programs including a new Payroll Software System; Human Resources Information System; and a new Electronic Time Tracking Software.

Temporary to Permanent Hiring

Boudreau will train approximately 6 workers under Panel guidelines for the Temporary-to-Permanent program (Job Number 1). 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. These trainees receive health benefits 60 days after conversion from temporary to 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 Boudreau 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 delivered via Classroom/Laboratory, Productive Lab and Computer-Based Training methodologies and will occur at the Company’s facility in Corona and on the job site. The following are some of the curriculum topics included in the Menu Curriculum, Exhibit B of the proposed agreement.

Business Skills: Communication Skills, Customer Relations, Job Costing and Accounting, Estimating & Bidding Procedures, Negotiation Skills


Continuous Improvement: Lean Construction, Construction & Engineering Best Practices, Leadership in Construction

Certified Safety Training

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

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

Boudreau requests PL training for Laborers. Most of the training will occur in a simulated laboratory setting at the Company site; however the simulated lab cannot re-create every situation that will occur on the job site. Boudreau will utilize PL for Equipment Operations and Maintenance. Training will be provided by a Foreman or experienced Laborer. Most training sessions will be at a 1:1 trainer-to-trainee ratio; however, some sessions will require a 1:2 ratio as situations require trainees work in pairs.

Computer-Based Training

CBT will be provided to supplement Class/Lab training. No trainees will receive more than 100 hours of CBT. Boudreau expects that trainees will receive an average of 40 hours of CBT.

Commitment to Training

Boudreau currently spends approximately, $240,000 per year on training including new hire orientation, sexual harassment prevention, diversity training, conflict resolution, and general safety training. ETP funds will not displace the Company’s existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

The HR Director will oversee the ETP project and will work in conjunction with the Training Manager and an HR Assistant to schedule, track and administer training. In order to correct internal resource issues in the last contract, 100% of the Training Manager’s time will be spent on training, including the ETP funded training (see Prior Project Section below). The Company has also retained Training Refund Group to assist with administration of the project.

The Training Manager will provide the bulk of training. Some PL training will be provided by experienced Foreman and experienced Laborers in the field. Boudreau may also utilize vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Boudreau 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>ET16-0443</td>
<td>Corona</td>
<td>6/6/2016–6/5/2018</td>
<td>$184,320</td>
<td>$0</td>
<td>0%*</td>
</tr>
</tbody>
</table>

*Boudreau’s ET16-0443 is in the process of Fiscal Closeout, with tracked potential training hours of 5,754. The projected earnings under this project is approximately $103,572, or 56% of the Agreement amount. Boudreau reports that the Company performed poorly due to a lack of internal resources dedicated to the ETP project at the beginning of the project. In addition, the Company
Boudreau Pipeline Corporation  
July 27, 2018

ET19-0149

reported that significant business needs prevented the Company from performing as much training as was anticipated. Near the end of the project, Boudreau provided a significant amount of training in an effort to make-up for lost time but was unable to meet the contract amounts with the time remaining.

In order to address the poor performance and to formalize its training plan, Boudreau has mandated ETP training as a Companywide priority. In addition, a full time training manager has been hired, whose sole responsibility is to oversee training at the Company, including ETP-funded training.

Given the poor performance in this last project, this proposal has been right-sized to match prior earnings, more in line with Boudreau’s capacity to provide training while still meeting work demands.

**DEVELOPMENT SERVICES**

Boudreau retained Training Refund Group in Anaheim to assist with development of this proposal for a flat fee of $5,000.

**ADMINISTRATIVE SERVICES**

Boudreau also retained Training Refund Group 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

- Decision Making
- Communication Skills
- Customer Relations Modules 1, 2, 3
- Effective Time Management
- Job Costing and Accounting
- Estimating & Bidding Procedures and Processes Modules 1, 2, 3
- Negotiating Everything Construction
- Business Writing for Contractors Modules 1, 2, 3
- Human Resource Management & Expertise
  o Relationship Management
  o Consultation
  o Communication
  o Critical Evaluation
  o Business Acumen

COMMERCIAL SKILLS

- Blueprint Reading
- Mobile Home Park Basics
- Dry Utility Competencies, Modules, 1,2,3
- Electrical Basics for Dry Utilities Modules, 1,2,3
- Building Codes
- Construction Literacy
- Construction Workflow Dynamics and Techniques
- Equipment Operations Maintenance
- Field Operation Procedures
- Map Training
- Tracking your Field Production
- Laser Operation
- Rigging Techniques
- Daily Reporting Skills at the Jobsite
- Performing Quantity and Material Takeoffs
- Dry Utility Competencies, Modules, 1,2,3
- Electrical Basics for Dry Utilities Modules, 1,2,3
- Gas Line Basics for Dry Utilities Modules, 1,2,3
- Heavy Equipment Simulator

COMPUTER SKILLS

- Planswift Application Skills
- Critical Path Method Scheduling
- Microsoft Office intermediate -Excel/Word
- Outlook Applications and Interface
- Adobe Acrobat Training
• Human Resources Information Software (HRIS)
• Payroll Software
• Electronic Time Tracking/Capture Software

**CONTINUOUS IMPROVEMENT**

• Lean Construction
• Construction Best Practices
• Engineering Best Practices
• Construction Project Management Best Practices
• 7 Habits of Highly Effective People
• Leadership in Construction Workshop Modules 1, 2, 3
• Motivation & Team Building
  Leadership & Management for Non-Managers Modules 1, 2, 3
• Management Styles Modules 1, 2, 3

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

• OSHA 10 (requires completion of 10 training hours)
• OSHA 30 (requires completion of 30 training hours)

**Computer Based Training**

0 – 100

**BUSINESS SKILLS**

• Human Resource Management & Expertise
  o Relationship Management (6.5HR)
  o Consultation (6.5HR)
  o Leadership and Navigation (6.5HR)
  o Communication (6.5HR)
  o Critical Evaluation (6.5HR)
  o Business Acumen (6.5HR)

**Productive Lab**

0 - 60

**COMMERCIAL SKILLS**

• Equipment Operation and Maintenance Skills
• Heavy Equipment Operation in the Field

---

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:

**California Long Term Care Education Center**

**Agreement Number:** ET19-0186

**Panel Meeting of:** July 27, 2018

**ETP Regional Office:** North Hollywood  
**Analyst:** E. Wadzinski

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes</th>
<th>Industry Sector(s):</th>
<th>Healthcare</th>
<th>Priority Industry: Yes No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retrainee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Hire</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SET</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority Rate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Skills Training</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple Barriers</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statewide</td>
<td>Yes No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Turnover Rate:</th>
<th>Managers/Supervisors: (% of total trainees)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>≤20%</td>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Repeat Contractor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>SEIU Local 2015</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$166,400</td>
<td>$12,440</td>
<td>$178,840</td>
</tr>
<tr>
<td></td>
<td>(8% - Job 1)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(12% - Job 2)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
<th>Total ETP Funding Required:</th>
</tr>
</thead>
<tbody>
<tr>
<td>50% of Total ETP Funding Required</td>
<td>Inherent</td>
</tr>
</tbody>
</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>Retrainee Priority Rate SET Multiple Barriers Medical Skills Training</td>
<td>Commercial Skills</td>
<td>32</td>
<td>8 - 200</td>
<td>$4,449</td>
<td>$11.00</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>Weighted Avg: 160</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>New Hire Priority Rate SET Multiple Barriers Medical Skills Training</td>
<td>Commercial Skills</td>
<td>8</td>
<td>8 - 200</td>
<td>$4,559</td>
<td>$11.00</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>Weighted Avg: 160</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:
- $11.39 per hour for Alameda, Contra Costa, Marin, San Mateo, and Santa Clara Counties;
- $15.00 per hour for San Francisco;
- $13.25 per hour for Los Angeles County;
- $11.00 per hour for Orange County, San Diego, Sacramento County, and all other counties.

### 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
  - 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 (RETRAINEE)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Records Assistant</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Housekeeper</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Foodservice Worker/Cook/Dietary Worker</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Laundry Worker</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Social Service Assistant</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Central Supply and Maintenance Assistant</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Activity Assistant</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td><strong>JOB NUMBER 2 (NEW HIRE)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CNA</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

Wages for this proposal are per the collective bargaining agreement as allowed by ETP.
INTRODUCTION

California Long-Term Care Education Center (Education Center) is a statewide non-profit collaboration between the Service Employees International Union (SEIU) Local 2015 and signatory employers. The mission of the Education Center is to provide educational opportunities to build better lives, provide quality care, meet and invest in the critical needs of the long-term care workforce.

The Education Center serves long term care workers throughout California, across a range of occupations, educational levels, and career paths. Workers are offered a variety of educational courses and opportunities including Skill Building, Prep for High School Equivalency Certificate, English as a Second Language, Continuing Education Unit's for Certified Nurse Assistants (CNA's) and Licensed Vocational Nurses (LVN's), both online and in person. Also, the Education Center offers training for certification such as a ServSafe Food Handler, Restorative Nurse Assistant (RNA) and CNA. To bring training directly to workers, courses are held at signatory employer facilities and SEIU Local 2015 Union Halls.

In addition to the educational opportunities, the Education Center provides support services such as Counseling (career, academic, and personal/social), screening for and placement in courses, retention and course completion, recruitment, competency checks, and tutoring for the High School Equivalency Certificate Prep Course. Workers may also receive fee reimbursement for the High School Equivalency Exam.

Signatory employers and Union representatives complete an annual survey providing feedback and recommendations that address the worker and employer educational and training needs. The Education Center uses the survey to strategize training and improve the outcomes.

PROJECT DETAILS

With the purpose of building better lives for long term care workers, the Education Center, with support from Local 2015 and signatory employers, implemented a CNA career pathway program. The program provides long term care workers in occupations such as dietary, maintenance, activity assistant, and laundry, a mechanism to acquire new skills for upward mobility. In addition to these occupations, the program trains individuals who face multiple barriers to employment and the underemployed. In this proposal, the Education Center plans to train up to 35% from this population. To make the program accessible to the diverse workforce, the training is offered in multiple languages.

Training Plan

The California Department of Public Health sets the standards of 100 hours clinical (preceptor) and 60 hours of didactic work to meet the qualifications of the CNA training program. The curriculum outlines 16 modules. Training in each module starts with didactic training, followed by preceptor training. This training model is effective in ensuring trainees are competent in the subject matter. After ETP-funded training is complete, trainees will be eligible to take a state exam to receive this certification.

Medical Skills

Training will be provided to all occupations to help long-term care workers provide better care to patients with minimal patient disruption. Trainees will learn to work independently, execute job tasks safely and efficiently, respond to and solve problems in a timely manner, and implement higher care and customer service measures. Trainees will also learn to update, maintain, and operate devices and equipment as well as report client medical issues.
Commitment to Training

ETP funds will not displace participating employers’ existing financial commitment to training. Employers provide new hire orientation, essential job skills training, and basic safety training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

The Education Center receives other funding for non-workplace skills training classes; however, ETP funding will not be used to cover these costs.

➢ Training Infrastructure

The Education Center has dedicated five (5) full time employees to oversee project administration.

Trainer Qualifications

Training will be provided by several state-certified vendors located across the state. Vendors will be determined based on location of trainees.

Marketing and Support Costs

Participating employers are recruited by The Education Center via websites, mailers, informational sessions and employer engagement. Workers are also notified of training through their union local and directly by the training center through website postings and mailings. The Education Center surveys, interviews, and gives presentations to employers, The Education Center’s Joint Labor-Management Board, SEIU 2015, and long-term care workers and uses the information to market training. The Education Center’s long-term relationships with its stakeholders help contribute to the development of concise program training objectives.

The Education Center requests 8% support costs for retrainees (Job Number 1) and 12% for new hires (Job Number 2) to assist in recruitment, employer outreach, and assessment of employer-specific job requirements. Although many of the participating employers have already been notified, additional outreach and needs assessments will continue throughout the Agreement term.

Special Employment Training (SET/MB)

This project will target workers with multiple barriers to employment who lack essential job skills necessary to improve their employment opportunities. Trainees 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 Modification

Trainees in Job Numbers 1 and 2 have two or more barriers to employment (e.g., adult learners who may be returning to the classroom after many years, mental or physical disability, limited English proficiency, and limited math skills). These multiple barrier trainees are eligible to receive the ETP Standard Wage. However, the Panel may accept a collective bargaining minimum wage. The Education Center is requesting a post-retention wage of $11.00 per hour, consistent with the collective bargaining agreement.
Retirement Modification

Healthcare workers are eligible for full-time employment and retention modifications. The Education Center requests to modify the full-time employment retention requirement from 35 to 30 hours per week in a 90-day period. Additionally, the Education Center requests an alternate retention of 500 hours within 272 days with one or more employers to satisfy the retention requirement.

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.

Union Support

The SEIU 2015 supports the proposed training and will play an active role in shaping the goals of The Education Center’s CNA certification program. SEIU Local 2015 supports training for members as outlined in The Education Center’s ETP training proposal.

Electronic Recordkeeping

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

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

The Education Center retained The California Labor Federation WED in Orangevale to assist with development of this proposal for no fee.

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

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

**MEDICAL SKILLS (Didactic 1:20 ratio and Preceptor 1:10 ratio)**

Module 1: Introduction
- Roles and Responsibilities of CAN
- Title 22
- Requirements of CNA
- Professionalism
- Ethics and confidentiality

Module 2: Patients’ Rights
- Title 22
- Health and Safety Code
- Code of Federal Regulations

Module 3: Communication/Interpersonal Skills
- Communications
- Defense mechanisms
- Sociocultural factors
- Attitudes illness/healthcare
- Family interaction

Module 4: Prevention and Management of Catastrophe and Unusual
- Occurrences
- Emergency
- General safety rules
- Fire and disaster plans
- Roles and procedures for CAN
- Patient safety

Module 5: Body Mechanics
- Basic body mechanics
- Transfer techniques
- Ambulation
- Proper body mechanics/positioning techniques

Module 6: Medical and Surgical Asepsis
- Microorganisms
- Universal precautions
- Principles of asepsis
Module 7: Weights and Measures
- Metric system
- Weight, length, and liquid volume
- Military time

Module 8: Patient Care Skills
- Bathing/medicinal baths
- Dressing
- Oral hygiene
- Hair care, shampoo, medicine shampoo, nail care, shaving
- Prosthetic devices
- Skin care/decubitus ulcers
- Elimination needs
- Bowel and bladder retraining
- Weigh and measure patient

Module 9: Patient Care Procedures
- Collection of specimens
- Care of patient with tubing, gastric, oxygen, urinary, IV I and O
- Bed making
- Cleansing enemas, laxative suppositories
- Admission, transfer, discharge
- Bandages, dressings application of topical ointments to intact skin

Module 10: Vital Signs
- Purpose of vital signs
- Factors affecting vital signs
- Normal ranges
- Methods of measurements
- Temperature, pulse, respiration
- Blood pressure
- Abnormalities
- Recording

Module 11: Nutrition
- Proper nutrition
- Feeding technique
- Diet therapy

Module 12: Emergency Procedures
- Signs and symptoms of distress
- Immediate and temporary intervention
- Emergency codes
Module 13: Long-Term Care Resident
- Needs of persons with retardation, Alzheimer's, cerebral palsy, epilepsy, Dementia, mental illness
- Introduction to anatomy and physiology
- Physical and behavioral needs and changes
- Community resources available
- Psychological, social, and recreational needs
- Common diseases/disorders including signs and symptoms

Module 14: Rehabilitative Nursing
- Promoting patient potential
- Devices and equipment
- ADLs
- Family interactions
- Complications of inactivity
- Ambulation
- ROM

Module 15: Observation and Charting
- Observation of patients and reporting responsibilities
- Patient care plan
- Patient care documentation
- Legal issues of charting
- Medical terminology and abbreviations
- Module 16: Death and Dying
- Stages of grief
- Emotional and spiritual needs of patient and family
- Rights of dying patient
- Signs of approaching death
- Monitoring the patient
- Postmortem care

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

WITHDRAWN
Training Proposal for:
Courage Production, LLC
Agreement Number: ET19-0160

Panel Meeting of: July 27, 2018
ETP Regional Office: Sacramento Analyst: K. Mam

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainee</th>
<th>Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Solano</td>
<td>Repeat Contractor:</td>
<td>Yes   No</td>
<td>Yes ☑ No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>☑ Yes</td>
<td>No</td>
<td>United Food and Commercial Workers Union, Local 5</td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 172</td>
<td>U.S.: 172</td>
<td>Worldwide: 172</td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>☑ 11%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

Program Costs - (Substantial Contribution) - (High Earner Reduction) = Total ETP Funding

<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>$88,504</td>
<td>$0</td>
<td>$0</td>
<td>$88,504</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $97,826
### 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>

**Minimum Wage by County:** $16.70 per hour for Solano 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 $2.40 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>Information Technology</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Maintenance Technician</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Production Staff</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Office &amp; Finance</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Quality Control</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Sales/Marketing &amp; Customer Service</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Supervisor &amp; Manager</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td>7</td>
<td></td>
</tr>
</tbody>
</table>

### INTRODUCTION

Founded in 1962 and headquartered in Fairfield, Courage Production, LLC (Courage Production), is a subsidiary of Vero Foods. The Company was formerly known as Engelhart Gourmet Foods. Courage Production manufactures organic, all-natural and non-GMO deli meats such as sausages, hot dogs and fresh pork. Customers include regional chain grocery stores such as Costco, Safeway and Sprouts. Training will be provided at its single facility in Fairfield. This is Courage Production’s first Agreement.
Union Support

Workers are represented by United Food and Commercial Workers Union, Local 5. The letter of support is provided.

PROJECT DETAILS

Courage Production is experiencing a growth in production due to expanding markets in the Midwest and the Eastern United States, resulting in a need to enhance operations. To meet these needs, the Company is implementing a comprehensive cross-training program aligned with a new operating model to ensure more cost effective and efficient operations. Courage Production has invested $2M in new automated equipment such as jerky machines and slicers. Staff will be trained on Lean Manufacturing and automated equipment operation to improve production workflow.

Sales and Marketing Staff will be trained to increase product awareness. Training will ensure the product line can remain competitive as the Company expands its market.

Training Plan

Training will be delivered via classroom/laboratory, Productive Lab (PL) and Computer-Based Training (CBT) methods in the following:

Business Skills: Training will be offered to all occupations and focus on increasing business strategies. Training topics include Sales Strategies, Marketing Strategies and Working in Teams.

Commercial Skills: Training will be offered to Sales/Marketing and Customer Service. Training will focus on increasing product knowledge. Topics include Product Knowledge and Brand Recognition.

Computer Skills: Training will be offered to Office & Finance and Information Technology. Training will focus on Excel Intermediate and Advanced training.

Continuous Improvement: Training will be offered to all occupations and focus on streamlining processes. Training topics include LEAN Lite and Process Improvement.

Literacy Skills: Training will be offered to Logistics, Maintenance Technicians, Quality Control, Production and Warehouse Staff. Training will increase key skills and industry-recognized core competencies. Training topic include English Instruction.

Management Skills: Training will be offered to Managers and Supervisors and focus on accountability and affordability. Training topics include Coaching Skills, Communication Best Practices and Teambuilding.

Manufacturing Skills: Training will be offered to Logistics, Maintenance Technicians, Quality Control, Production and Warehouse Staff and focus on new product lines. Training topics include New Product Lines, Labeling Systems and Automation Equipment.

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.

Courage Production will provide approximately 40 hours PL-Manufacturing Skills training for Maintenance Technicians, Production and Warehouse Staff. PL training will provide technical learning under practical working conditions excess product waste. Training will focus on Automation Equipment, Welding/Cutting/Brazing and Waste Water Training. The Company is
requesting a trainer-to-trainee ratio of 1:3 because various equipment requires up to three employees operating at a time.

Training will be taught by subject-matter experts with demonstrated knowledge and expertise in the field. Instructors will monitor trainee competencies before the trainee is deemed competent.

Commitment to Training

The Company invests over $14,000 annually on training, including legal compliance and new-hire orientations. ETP funds will not displace Courage Production’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

Courage Production is ready to begin training upon approval. The Director of HR and an HR Associate will coordinate all training efforts. The Company has retained a third-party administrator with extensive ETP experience to assist with project administration.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Economic Incentives Advisory Group in Phoenix, AZ assisted in the development for a flat fee of $6,600.00.

ADMINISTRATIVE SERVICES

Economic Incentives Advisory Group will also perform administrative services for a fee not to exceed 9.7% of payment earned.

TRAINING VENDORS

Mark Sato in San Carlos will provide Management Skills for a fee of $5,000. Other trainers will be identified for ETP record-keeping purposes.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS
- Marketing Strategies
- Resolving Conflicts
- Sales Strategies
- Working in Teams

COMMERCIAL SKILLS
- Brand Recognition
- Product Knowledge

COMPUTER SKILLS
- Excel (Intermediate/Advanced)

CONTINUOUS IMPROVEMENT
- LEAN Lite
- Process Improvement

LITERACY SKILLS
- English Instruction

MANAGEMENT SKILLS (Managers/Supervisors Only)
- Coaching Skills
- Communication Best Practices
- First Time Manager Training
- Leadership Skills
- Teambuilding

MANUFACTURING SKILLS
- Automation Equipment
- Basic Food Facility Defense
- Forklift
- Hazardous Communication
- Housekeeping
- Intro to Food Allergens
- Intro to Food Safety Standards and Safe Quality Foods
- Jerky Line
- Labeling Systems
- Pallet Truck
- Safety Data Sheets
- Slicer Line
- Smoke Ovens
- Waste Water Training
- Welding/Cutting/Brazing

Literacy Training cannot exceed 45% of total training hours per-trainee
Safety Training cannot exceed 10% of total training hours per-trainee.
**Productive Lab Hours**
0-40

**MANUFACTURING SKILLS** (Ratio 1:3)
- Automation Equipment
- Forklift
- Pallet Truck
- Smoke Ovens
- Waste Water Training
- Welding/Cutting/Brazing

**CBT Hours**
0-8

**MANUFACTURING SKILLS**
- Basic Food Facility Defense (20 mins)
- Controlling Salmonella in Food Manufacturing (20 mins)
- Effective Record Keeping Practices (15 mins)
- Environmental Monitoring Basics (25 mins)
- GMPs for Maintenance Personnel (20 mins)
- Good Manufacturing Practices (30 mins)
- Introduction to Food Safety Standards (20 mins)
- Introduction to FSMA (15 mins)
- Lean Manufacturing (20 mins)
- Lift Truck Operator Overview (20 mins)
- Material Handling – Distribution (20 mins)
- Overview of HACCP (20 mins)
- Overview of Preventive Controls (20 mins)
- Pallet Truck Review (15 mins)
- Preventing Food Contamination (25 mins)
- Slips, Trips, and Falls – Distribution (20 mins)
- Understanding Listeria and its Dangers to Food (25 mins)
- Waste Management Procedures and Proper Disposal (15 mins)

**MANAGEMENT SKILLS**
- Being a Successful Supervisor (20 mins)
- Communicating Effectively in the Workplace (20 mins)
- Overview of HACCP for Supervisors (25 mins)

---

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
Doubleco Incorporated dba R & D Fasteners
Agreement Number: ET19-0171

Panel Meeting of: July 27, 2018
ETP Regional Office: San Diego
Analyst: K. Hernandez

PROJECT PROFILE

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

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>San Bernardino</th>
<th>Repeat Contractor:</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 120</th>
<th>U.S.: 120</th>
<th>Worldwide: 120</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>12%</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors: (% of total trainees)</th>
<th>6%</th>
</tr>
</thead>
</table>

FUNDING DETAIL

Program Costs - (Substantial Contribution) - (High Earner Reduction) = Total ETP Funding

| $87,750 | $0 | $0 | $87,750 |

In-Kind Contribution: 100% of Total ETP Funding Required

$97,462
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</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Computer Skills, PL-Mfg. Skills, PL-Other Titles</td>
<td>75</td>
<td>8-200</td>
<td>0</td>
<td>$1,170</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 45</td>
<td></td>
<td>$16.70</td>
</tr>
</tbody>
</table>

Minimum Wage by County: Job Number 1: $16.70 per hour in San Bernardino County

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

Used to meet the Post-Retention Wage?: [ ] Yes [ ] No [ ] Maybe

Up to $2.00 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>CNC Staff</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Drivers</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Sales &amp; Marketing Staff</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Machine Operations Staff</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Quality Control Staff</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Support Staff</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1984 and located in Rancho Cucamonga, Doubleco Incorporated dba R & D Fasteners (R&D) engineers and manufactures industrial size screws, studs, nuts, and bolts made from carbon steel to exotic metal blends for a growing customer base across four markets. R&D’s products are utilized by companies primarily in defense, energy, commercial construction and water works sectors. Products are used by shipbuilders in San Diego, wind energy producers in Texas, engineers working on the bridges around San Francisco Bay and wastewater treatment plants across the United States.

PROJECT DETAILS

To stay competitive and produce specialty engineered fasteners, R&D must increase production/throughput, improve the quality of first batch products and decrease production costs. Therefore, the Company will focus training on Kaizen Event Training and LEAN Processes to...
change procedures that will increase production and maximize throughput. CNC and Machine Operations Staff will be trained on the new and improved processes. Kaizen Event Training will also assist Managers/Supervisors implement process improvement initiatives to help Operations Staff improve Project Management skills.

In addition, to improve first batch product quality and decrease production costs, the Company purchased an OEE software program and its hardware components. OEE software is an equipment optimization program that monitors equipment/machinery operation via sensors throughout the manufacturing process. R&D must have dedicated resources to train Managers/Supervisors, CNC, Machine Operations and Quality Control Staff on the Computer and Continuous Improvement Skills necessary to operate the OEE software program. This training will focus on the OEE Software program and Quality Assurance Skills needed to improve the quality of the first production run, decrease defects in final products while decreasing the operation time needed to generate the required units of an order.

Training Plan

Training will be delivered via class/lab and Productive Lab (PL) in the following:

**Business Skills**: Training will be provided to Managers/Supervisors, Drivers, Support, Machine Operations, CNC, Sales & Marketing and Quality Control Staff to increase their skill-set to improve Leadership Skills, Marketing Skills and Customer Service.

**Computer Skills**: Training will be provided to Support Staff, Machine Operations, CNC, Sales & Marketing and Quality Control Staff to effectively utilize Sales Software, Accounting Software, CNC Machinery software and OEE Software (Equipment Optimization platform).

**Continuous Improvement**: Training will be provided to all occupations to improve Quality Assurance, Project Management and execute Process Improvement initiatives.

**Manufacturing Skills**: Training will be provided to Managers/Supervisors, Machine Operations, CNC and Quality Control Staff to increase productivity and efficiency by building skills focused on Equipment Operation, ISO Training, Process Flow and CNC Machining.

**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.

PL training is needed during manufacturing operation and process improvement procedures to allow practical, real world experience that cannot be duplicated in a classroom and will allow for questions and feedback while the equipment is in operation. Machine Operations Staff need Manufacturing Skills training focused on Equipment Operations, Equipment Troubleshooting and CNC Machining that can only be delivered on the factory floor using manufacturing equipment.

In addition, Machine Operations Staff will need to receive Computer Skills training focused on OEE Software and CNC Machinery Software that is directly related to operating equipment and machinery. Machine Operations Staff will also receive Continuous Improvement training focused on Quality Assurance Skills, LEAN Processes and Process Improvement initiatives that are designed to optimize operations and is best delivered while the equipment is in operation.

Trainees will be under direct trainer supervision at all times. The trainer will impart knowledge, observe, verify comprehension, and submit appropriate training documentation. Training will be delivered at a 1:3 trainer-to-trainee ratio as this is the most efficient training method for training staff on the factory floor. Approximately 57 trainees will receive 40 PL hours in machining equipment, Equipment Optimization software and sensors and CNC machinery.
Commitment to Training

In 2017, R&D invested $50,000 in training in customer service, sales and software systems training. In addition, Machine Operations Staff received process improvement, machine operations, and manufacturing standards 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 project will be managed by the General Manager with assistance from a Support Staff member. R&D’s General Manager will ensure trainers have an understanding of ETP attendance roster documentation and administrative processes. The General Manager will work with department Managers to identify specific training needs. In addition, the Company retained Welsh Advisors to assist with administration. Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Welsh Advisors in Anaheim assisted with development for a flat fee of $6,825.

ADMINISTRATIVE SERVICES

Welsh Advisors 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
08-200

Trainees may receive any of the following:

BUSINESS SKILLS
- Leadership Skills
- Teambuilding Skills
- Communication Skills
- Marketing Skills
- Customer Service
- Product Knowledge

COMPUTER SKILLS
- OEE Software (Equipment Optimization Software)
- Computerized Scheduling Software
- Sales Software
- Accounting Software
- CNC Machinery Software

CONTINUOUS IMPROVEMENT
- Quality Assurance Skills
- LEAN Process
- Kaizen Event Training
- Process Improvement
- Project Management

MANUFACTURING SKILLS
- Equipment Operation
- Equipment Troubleshooting and Repair
- Process Flow
- CNC Machining
- ISO Training (International Organization for Standardization)
- Production Specifications
- Inventory Control
- Logistics

Productive Lab Hours
0-40

COMPUTER SKILLS (Ratio 1:3)
- OEE Software (Equipment Optimization Software)
- CNC Machinery Software

CONTINUOUS IMPROVEMENT (Ratio 1:3)
- Quality Assurance Skills
- LEAN Process
- Kaizen Event Training
- Process Improvement
MANUFACTURING SKILLS (Ratio 1:3)
- Equipment Operation
- Equipment Troubleshooting and Repair
- Process Flow
- CNC Machining
- ISO Training (International Organization for Standardization)
- Production Specifications

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
TRAINING PROPOSAL AMENDMENT
ELROB, INC.
Approval Type: Panel
Reference Number: 17-0840
Contract Number: 18CS-0067-000

Panel Meeting Date: 
Regional Office: San Diego Regional Office
Analyst Name: Ibarra, Maria
Contract Term Date: 9/19/2017 - 9/18/2019

Proposal Type: Single Employer Contract (SE)
Critical Proposal: No
Funding Source: OSC

FUNDING AMENDMENT:

<table>
<thead>
<tr>
<th>Current Funding ($)</th>
<th>Requested Funding Increase ($)</th>
<th>Revised Funding ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>$41,496.00</td>
<td>$49,400.00</td>
<td>$90,896.00</td>
</tr>
</tbody>
</table>

Training Cost | Admin Cost | Support Cost | Substantial Contribution | Total In Kind
$72,717.00    | $18,179.00 | N/A          | $0.00                    | $45,500.00

PROJECT PROFILE
Repeat Contractor: Yes
High Unemployment Area: No
Turn Over Rate(Applicant): 14.00 %

Industry Sector | Priority Industry
Manufacturing    | Yes

AMENDMENT REQUEST DETAILS:
Reason for the Amendment Request:
Average hours per trainee must increase from 84 to 184, in order to gain the skills required to meet customer mandates, as outlined in our original application. This change increases total hours to 3496 and total funding to $90,896

REVISED ITEMS:

Costing Group

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Job Title</th>
<th>No. Trainees</th>
<th>Min Training Hours</th>
<th>Max Training Hours</th>
<th>Estimated Training Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>From To</td>
<td>From To</td>
<td>From To</td>
<td>From To</td>
<td>From To</td>
</tr>
</tbody>
</table>

Group No. 1 Location: ELROB, INC.

S-RET-JOBCREATION-TEMPPERM Operator-Assembly 19 19 8.00 8.00 200.00 200.00 84.00 184.00
AMENDED FUNDING DETAILED

<table>
<thead>
<tr>
<th>Funding</th>
<th>Group No.</th>
<th>Attributes</th>
<th>Number Of Trainees</th>
<th>Weighted Average Hours</th>
<th>Reimbursement Rate</th>
<th>Cost Per Trainee</th>
<th>Cost Per Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>OSC</td>
<td>1</td>
<td>S-RET-JOBCREATION-TEMPPERM</td>
<td>19</td>
<td>184</td>
<td>$26.00</td>
<td>$4,784.00</td>
<td>$90,896.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Funding Total:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>19</td>
<td></td>
<td></td>
<td></td>
<td>$90,896.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Grand Total:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$90,896.00</td>
</tr>
</tbody>
</table>

Legend of Attributes

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>S</td>
<td>Single Employer</td>
</tr>
<tr>
<td>RET</td>
<td>Retrainee</td>
</tr>
<tr>
<td>JOBCREATION</td>
<td>Job Creation – Retrainee Initiative Program</td>
</tr>
<tr>
<td>TEMPPERM</td>
<td>Temp to Permanent</td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1988 and headquartered at its single location in Garden Grove, ELROB, Inc., dba El-Com System Solutions (El-Com), (www.elcomcabletek.com) designs and manufactures unique electro-mechanical components and assemblies for the aerospace, military, industrial, and commercial industries. The Company provides systems integration solutions, mechanical design and engineering, precision machining, and other services. Products include airborne cable harnesses, Chomerics shielding, rugged computer equipment and military and avionic cable harnesses. The Company's customers include Boeing, L3 Communications, Raytheon, Lockheed Martin, Crane Aerospace, Northrop Grumman, SpaceX, and some Israeli defense companies including Rafael, Mantek and Elbit.

AMENDMENT DETAILS

The Agreement was approved via Delegation Order on September 18, 2017 and training commenced on October 13, 2017. The current funding is to train 19 net new hire (Job Creation) Operators/Assemblers in Manufacturing Skills. Specifically, the training plan includes an average of 84 hours of training necessary to gain certification in Inter-Process Communications IPC/WHMA-A-620A (IPC) Specialist training as well as SpaceX Workmanship Standards. This training is critical to meet the production standards of the recently acquired SpaceX contract. Following the commencement of training, El-Com determined it necessary to reassess the number of training hours each trainee would require to receive the aforementioned specialist certification as well as meet customer demands. As a result, El-Com determined that newly hired workers will need an average of 100 more hours of training.

RECOMMENDATION

Staff recommends approval of this Amendment.
### ACTIVE CONTRACT PERFORMANCE

This table summarizes active contract(s) performance for ELROB, Inc.

<table>
<thead>
<tr>
<th>Contract Number</th>
<th>Approved Amount</th>
<th>Term</th>
<th>Total No. Trainees (Estimated)</th>
<th>Trainees Enrolled</th>
<th>Trainees Completed Training</th>
<th>Total Trainees Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>18CS-0067-000</td>
<td>$41,496.00</td>
<td>09/19/2017 - 09/18/2019</td>
<td>19</td>
<td>14</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Based on the ETP System for the current contract, 1356.00 reimbursable hours have been tracked for potential earnings of $35,256.00 (84.95 % of approved amount)
## Curriculum

### Exhibit B

### Classroom / Simulated Laboratory

<table>
<thead>
<tr>
<th>Training Type (Level)</th>
<th>Course/Class Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing Skills (ME) (Standard)</td>
<td>AV1200-4 Avionics Standard Operating Procedure</td>
</tr>
<tr>
<td>Manufacturing Skills (ME) (Standard)</td>
<td>IPC-620 Cable/Wire Harness Assemblies</td>
</tr>
</tbody>
</table>

### Productive Laboratory

<table>
<thead>
<tr>
<th>Training Type (Level)</th>
<th>Course/Class Topic</th>
<th>Trainer to Trainee Ratio</th>
<th>Max Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing Skills (ME) (Standard)</td>
<td>AV1200-4 Avionics Standard Operating Procedure</td>
<td>1:3</td>
<td>80.00</td>
</tr>
<tr>
<td>Manufacturing Skills (ME) (Standard)</td>
<td>IPC-620 Cable/Wire Harness Assemblies</td>
<td>1:3</td>
<td>80.00</td>
</tr>
</tbody>
</table>
Training Proposal for:
Fowler Packing Company, Inc.
Agreement Number: ET19-0151

Panel Meeting of: July 27, 2018
ETP Regional Office: Sacramento
Analyst: J. Dongallo

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>Agriculture</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Industry:</td>
<td>☑ Yes</td>
<td>☐ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Fresno</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat Contractor:</td>
<td>☑ Yes</td>
<td>☐ No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>☐ Yes</td>
<td>☑ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 400</th>
<th>U.S.:400</th>
<th>Worldwide: 400</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turnover Rate:</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>18%</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>$198,900</td>
<td>$0</td>
<td>$0</td>
<td>$198,900</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $220,014
## 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>Retraineepriory Rate</td>
<td>Business Skills, Computer Skills, Continuous Impr, Mfg Skills, Hazmat</td>
<td>150</td>
<td>8-200 0</td>
<td>$1,326</td>
<td>$12.53</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: $12.53 per hour 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  ☐

Up to $1.53 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>Administrative Staff</td>
<td>55</td>
<td></td>
</tr>
<tr>
<td>Sales Staff</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Accounting Staff</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Shipping Staff</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Production Leads</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>Quality Control Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Supervisors</td>
<td>27</td>
<td></td>
</tr>
</tbody>
</table>

## INTRODUCTION

Founded in 1950 and headquartered in Fresno, Fowler Packing Company, Inc. (Fowler Packing) (www.fowlerpacking.com) is a three-generation, family-owned grower, packer and shipper of fresh produce. The Company processes 15 million boxes of citrus and 7 million boxes of stone fruit and table grapes per year, of which two-thirds are grown by the Company. Their customer base includes small and large retailers, such as Costco and Wal-Mart. Training will take place at the Company’s Fresno facility.

## PROJECT DETAILS

This will be Fowler Packing’s second ETP Agreement and the second in the last five years. The prior Agreement focused on existing equipment training and various process improvements.
Training under this contract will focus on courses that were not delivered in the previous contract, as well as a new phase in its upgraded ERP software system, processing line expansion, and continual updates on regulatory processes within the industry. Training will not duplicate that provided in the prior project.

Fowler Packing is near completion of Phase 1 and will start Phase 2 of the implementation of its new ERP system, Dynamics NAV. The ERP software upgrade will combine multiple department systems, enabling employees to plan, schedule, and adjust business and production processes. Part of Phase 1 was delivered in the previous contract and will be completed in this contract. Training will provide employees skills to navigate the system proficiently.

Additionally, Fowler Packing recently upgraded processing lines and technology to keep pace with industry and customer demands. The Company has invested $1.75M to upgrade grading, sorting, and sizing machinery. The improved equipment will allow the Company to improve production efficiencies, by reducing product and water waste. Training will provide workers with operational and equipment specific manufacturing skills training necessary to be efficient.

Training Plan

To standardize operating procedures, as well as stay abreast with changing industry regulations, Fowler Packing has created internal training programs for all occupations. Training will be conducted by in-house subject-matter experts and vendors, as needed.

**Business Skills:** Training will be provided to all occupations, except Maintenance Staff, in administrative efficiency. Training topics include Administration, Communication Skills, Payroll, and Product Knowledge.

**Computer Skills:** Training will be offered to all occupations, except Maintenance Staff, to improve internal processes and increase employee’s proficiency in the use of various business software solutions. Training topics include Computerized Scheduling, Cost Accounting, Material Resource Planning, Microsoft Dynamics NAV, Purchase Order Tracking, and Sales Forecasting.

**Continuous Improvement:** Training will be offered to Production Leads, Maintenance Staff, Quality Control Staff and Supervisors. Staff will receive training to improve continual changes during the main harvest season rather than during a period when changes have minimal impact. Training topics include Analyzing Improvement Opportunities, Effective Meetings, Eliminating Waste and Production Scheduling.

**Manufacturing Skills:** Training will be offered to Shipping Staff, Production Leads, Maintenance Staff, Quality Control Staff and Supervisors. Training will focus on new equipment processes to produce higher yields of quality product. Training topics include Electronic Product Graders, Equipment Operation, Harvesting Techniques and Equipment, Load Accuracy, Shipping Process and Sorting Systems.

**Hazardous Materials:** Training will be offered to all occupations. Staff will receive the skills necessary to ensure a safe work environment while working with dangerous materials. Training includes Chemical Safety.

**Commitment to Training**

Fowler Packing has an annual training budget of approximately $250,000 for its Fresno facilities. The Company utilizes subject-matter experts to conduct training and moving forward, the Company intends to significantly increase the number of subject matter experts specializing with
equipment upgrades to deliver more training. The training budget includes state-mandated safety training, equipment maintenance and installation, food safety and security, and sales training.

ETP funds will not displace the existing financial commitment to training. At the completion of ETP training, Fowler Packing will continue to provide its workforce the skillsets they need to develop and grow within the Company. Safety training is provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

Three HR staff members have been assigned to administer the ETP contract. The Chief Information Officer (CIO) will oversee all administrative responsibilities to ensure compliance with all ETP requirements.

Additionally, the CI Manager will be working with a System Administrator to track training reports and collect internal data. A team of Supervisors/Managers and Production leads will assist in the delivery of training within the Company.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Fowler Packing 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>ET16-0210</td>
<td>Fresno</td>
<td>11/01/2015–10/31/2017</td>
<td>$348,750</td>
<td>$229,923 (66%)</td>
</tr>
</tbody>
</table>

*ET16-0210: Training under the previous agreement focused on Computer Skills including the previous ERP system (Unisun), Warehouse Management and Farm Costing. Additionally, training focused on Manufacturing Skills such Automated Packing Equipment, Conveyor Systems, and Good Manufacturing Processes.

Production demands resulted in a shift in focus away from training. Fowler Packing has adjusted training infrastructure to adapt to unexpected production demands to improve training delivery. The Company has developed a training plan that will allow flexibility to address production demand. Additionally, the CIO has stepped in to oversee the Contract and ensure that the training plan is being followed.

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 SKILL**
- Accounting
- Administration
- Communication Skills
- Farm Costing
- Human Resources
- Payroll
- Product Knowledge
- Supply Chain Management
- Warehouse Management

**COMPUTER SKILLS**
- Agrian Software
- Computerized Scheduling
- Cost Accounting
- ER Portal – Shop Software
- Inventory Control
- Material Resource Planning (MRP)
- Microsoft Dynamics NAV (ERP)
- Microsoft Office Suite (Intermediate/Advanced)
- Pago Software
- Purchase Order Tracking
- Sales Forecasting
- Strategic Resource Planning
- Zetadocs Payables Approvals

**CONTINUOUS IMPROVEMENT**
- Analyzing and Reporting Data
- Analyzing Improvement Opportunities
- Effective Meetings
- Eliminating Waste
- Just-in-Time Processes
- Production Scheduling
- Food Safety
- Safe Working Conditions
- Safety Leadership

**HAZARDOUS MATERIALS**
- Chemical Safety

**MANUFACTURING SKILLS**
- Automated Packaging Equipment
- Automated Palletizers Operations
- Box Forming Equipment
- Chemical Application Food Safety
- Cold Storage
• Control Systems
• Conveyor Systems
• Documenting Traceability
• Electronic Product Graders
• Equipment Maintenance
• Equipment Operation
• Equipment Set-Up and Testing
• Forklift Certification
• Good Manufacturing Practices
• Grading Systems for Produce
• Harvesting Techniques and Equipment
• Inventory Control
• Irrigation Techniques
• Load Accuracy
• Machine Guarding
• Mechanical Systems
• Pallet Tagger
• Preventive Maintenance
• Quality Control Systems
• Quality Inspection
• Receiving Process
• Refrigeration Systems
• Sanitation Procedures
• Shipping Process
• Shop Mechanic
• Shrink Wrapping Systems Operations
• Sizing Systems for Produce
• Sorting Systems
• Troubleshooting
• Wash System

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

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

Training Proposal for:

Georgia-Pacific Corrugated LLC

Agreement Number: ET19-0163

Panel Meeting of: July 27, 2018

ETP Regional Office: Sacramento

Analyst: K. Mam

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
<th>HUA</th>
<th>Job Creation Initiative</th>
<th>Industry Sector(s): Manufacturing</th>
<th>Priority Industry: Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Madera</td>
<td></td>
<td></td>
<td></td>
<td>Repeat Contractor: Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 675</td>
<td>U.S.: 5,850</td>
<td>Worldwide: 35,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>8%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>(% of total trainees)</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

Program Costs $129,480 - (Substantial Contribution) $0 (High Earer Reduction) $0 = Total ETP Funding $129,480

In-Kind Contribution: 100% of Total ETP Funding Required $130,000
### 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>Priority Rate HUA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainees</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improv, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills</td>
<td>6</td>
<td>8-200</td>
<td>0</td>
<td>$780</td>
</tr>
<tr>
<td></td>
<td>Priority Rate HUA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Job Creation</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:**  
Job Number 1 (HUA): $12.53 per hour for Madera County  
Job Number 2 (Job Creation/HUA): $11.00 per hour for Madera County

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

**Used to meet the Post-Retention Wage?**

<table>
<thead>
<tr>
<th>Yes ☒ No ☐ Maybe ☐</th>
</tr>
</thead>
</table>

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>Production Staff</td>
<td>99</td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Quality Control Staff</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Administrative/Sales Staff</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>Safety Staff</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2 (Job Creation)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production Staff</td>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1927 and headquartered in Atlanta, Georgia, Georgia-Pacific Corrugated LLC (Georgia Pacific) (www.gp.com), manufactures bulk paper container boxes and packaging for a variety of industries, with worldwide distribution. Georgia Pacific is a wholly-owned subsidiary of Koch Industries, Inc. (headquartered in Wichita, Kansas). Georgia Pacific has multiple locations in California; however, only the Madera facility will participate in the proposed training.

PROJECT DETAILS

This will be Georgia Pacific’s sixth Agreement, and the third in the last five years. Training in the previous project focused on new equipment. In this proposal, training will focus on product customization. The Company has invested in upgrading rotary die cutter machinery with new settings and configurations to meet customer specifications. Training will ensure staff can provide quality products to meet customer expectations. Georgia Pacific is also expanding modules on its Kiwi/PCS Software system. Staff will be trained on newly acquired capabilities on sales order, customer service, and scheduling functions. Although training topics are similar to those provided in the prior Agreement, trainees will not repeat the same training courses previously received.

Retrainee - Job Creation

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

Georgia Pacific has experienced an increase in sales and production due to new customer demands. To accommodate this increase, Georgia Pacific will hire six new Production Staff (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Training will be delivered via Classroom/Laboratory and Productive Lab (PL) methods in the following:

Business Skills: Training will be offered to all occupations and focus on providing advanced sales and account development. Training topics include Advanced Account Development and Effective Communications.

Commercial Skills: Training will be offered to Maintenance and Production Staff and focus on increasing skill in production equipment repair and diagnostics.

Computer Skills: Training will be offered to all occupations and focus on newly upgraded software and existing software the Company utilizes. Training topics include Kiwi/PCS Software Upgrades, CoPar Production Machinery Operating Software Training and CAD/CAD 3D Software Training.

Continuous Improvement: Training will be offered to all occupations and focus on quality control and increasing productivity. Training topics include Team Building, Advanced LEAN and Quality Control Program.

Management Skills: Training will be offered to Managers and Supervisors and focus on strategic planning of product configurations.
**Manufacturing Skills:** Training will be offered to Production Staff and focus on modified and upgrade equipment. Training topics include Production Equipment Operation and Materials Handling Equipment Training.

**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.

Georgia Pacific will provide approximately 12 hours of PL-Manufacturing Skills training to Production and Maintenance Staff. PL training will extend technical learning under practical working conditions without creating excess waste. The raw material used in production processes is very expensive and the cost of waste is prohibitive. Training will ensure staff are proficient on machinery. PL training will focus on production equipment training on the rotary die cutter. The Company is requesting a trainer-to-trainee ratio of 1:3 as trainees work in teams of three when operating machines.

Training will be taught by subject-matter experts with demonstrated knowledge and expertise in the field. Instructors will monitor trainee competencies before the trainee is deemed competent.

**Certified Safety Training**

OSHA 10/30. Training will be offered to Production Staff, Maintenance Staff, Managers, Supervisors and Quality Control Staff. 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.

**Commitment to Training**

The Company invests over $300,000 per facility annually for training that includes orientation, violence in the workplace, sexual harassment prevention and complete safety program 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 HR Manager and two support staff will oversee all training efforts and ensure recordkeeping requirements are met. Additionally, the Company has retained a third-party administrator with extensive ETP administration experience to work closely with staff to complete the project successfully. Training will be delivered by in-house experts and vendors as needed.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes performance by Georgia Pacific 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>ET16-0392</td>
<td>Madera</td>
<td>03/02/16 – 03/01/18</td>
<td>$59,616</td>
<td>$0 (0%)*</td>
</tr>
<tr>
<td>ET14-0173</td>
<td>Madera</td>
<td>10/01/13 – 09/30/15</td>
<td>$96,768</td>
<td>$59,331 (61%)</td>
</tr>
</tbody>
</table>

*ET16-0392: This project is in fiscal closeout. Based on ETP Systems, 2,592 reimbursable hours have been tracked for potential earnings of $49,168.00 (82% of approved amount). During term of the contract, the Plant Manager and Production Manager left the Company. The change in contract management during the contract term impacted the delivery of training. The new Plant Manager will oversee the new training proposal. The HR Manager and two support staff will help facilitate training. The administrative subcontractor will assist with project administration. A detailed training schedule is in place to ensure training is delivered as planned.

ET14-0173: During the term of the contract, the Director of Operations, Quality Control and Safety Manager left the Company. Training was delayed and performance impacted.

**DEVELOPMENT SERVICES**

Strategic Business Solutions in Visalia assisted in the development for a flat fee of $5,750.

**ADMINISTRATIVE SERVICES**

Strategic Business Solutions will also perform administrative services for a fee not to exceed 10% of payment earned.

**TRAINING VENDORS**

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS
- Advanced Account Development
- Effective Communications

COMMERCIAL SKILLS
- Production Equipment Repair and Diagnostics
- Confined Space Training
- Height Safety Training
- Combustible Dust Training
- Breathing Apparatus Equipment Training

COMPUTER SKILLS
- Kiwi/PCS (Planning/Scheduling) Software Upgrades
- Factory Floor Feedback Software Training
- MP2 Maintenance Software Upgrades
- Infinity Quality System Software Training
- CoPar Production Machinery Operating Software Training
- CAD/CAD 3D Software Training

CONTINUOUS IMPROVEMENT
- Teambuilding
- Leadership Skills
- Advanced LEAN
- Quality Control Program

MANAGEMENT SKILLS (Manager/Supervisor Only)
- Strategic Planning Phase 2

MANUFACTURING SKILLS
- Production Equipment Operation and Preventative Maintenance
  - Rotary Die Cutter
  - Corrugator
  - Unitizer
- Materials Handling Equipment Training

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

Safety Training cannot exceed 10% of total training hours per-trainee.
**Productive Lab Hours**
0-12

**MANUFACTURING SKILLS** (Ratio 1:3)
- Production Equipment Training
  - Rotary Die Cutter

**Note:** Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
Golden State Foods Corp.
Agreement Number: ET19-0165

Panel Meeting of: July 27, 2018
ETP Regional Office: North Hollywood
Analyst: J. Romero

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Priority Rate Retraine</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>Yes □ No</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Los Angeles</td>
<td>Repeat Contractor:</td>
<td>Yes □ No</td>
</tr>
</tbody>
</table>

Union(s): Yes □ No Teamsters Union Local 63
Number of Employees in:
- CA: 1,821
- U.S.: 5,594
- Worldwide: 6,693

Turnover Rate:
9%
Managers/Supervisors:
(% of total trainees) 16%

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>$79,092</td>
<td>$0</td>
<td>$0</td>
<td>$79,092</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $85,050
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 Impr, HazMat, Mfg Skills</td>
<td>338</td>
<td>8-200 0-20</td>
<td>Weighted Avg: 9</td>
<td>$234</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $17.54 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 $2.48 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>Production</td>
<td></td>
<td>203</td>
</tr>
<tr>
<td>Warehouse</td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>Maintenance</td>
<td></td>
<td>16</td>
</tr>
<tr>
<td>Sanitation</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Janitor</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Quality Assurance</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>Product Development</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Finance/Accounting</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Administrative/Support</td>
<td></td>
<td>14</td>
</tr>
<tr>
<td>Supervisor</td>
<td></td>
<td>20</td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td>11</td>
</tr>
<tr>
<td><strong>TOTAL:</strong></td>
<td></td>
<td><strong>338</strong></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Golden State Foods Corp. (GSF) (www.goldenstatefoods.com) is a manufacturer and distributor of diversified products in the food service industry.

Founded in 1947, GSF processes and distributes liquid and meat food products, baked goods, and produce to more than 20,000 quick-service eateries from 21 distribution centers across the country. It is a primary supplier of beef patties, buns, condiments, and toppings to McDonald’s nationwide. GSF is also a supplier and formula holder for Hardee’s, KFC, Pizza Hut, T.G.I.F., Applebee’s, Zaxby’s, Arby’s, Church’s Chicken, Papa John’s Pizza, Cinnabon, Bon Appetit, Mom’en, Sweedy Foods, Smiles’ Grill, Roastery’s, Euro Deli, Taco Bell, and Del Taco.
GSF has three facilities in the City of Industry: Manufacturing Plant, Distribution Center, and Quality Custom Distribution. Corporate headquarters is located in Irvine. Internationally, GSF supplies customers in 60 countries from facilities in Cairo, Egypt; Sydney and Perth, Australia; and Auckland, New Zealand. This is GSF’s fourth ETP Agreement and the third in the last five years. Employees from the three City of Industry facilities will participate in training.

**PROJECT DETAILS**

GSF has steadily expanded its market area in the past years. The increase in product demand combined with a much larger market to supply, requires new processes and an upgrade to a large-scale enterprise resource planning (ERP) software scheduled to go live on April 2019. In addition, GSF has implemented process improvements: environmental system methods affecting product preparation, movement, storage and energy usage and ISO 14001 certification training. Training will prepare and equip employees with new skills to effectively and efficiently complete processes. Some trainees must also be cross-trained. These employees have to be fully trained with a variety of skillsets and departmental and company knowledge. These changes and initiatives require new and continuous training for all occupations.

**Union Support**

The Teamsters Local 63 represents all employees participating in this ETP Agreement at GSF – City of Industry. A letter of support has been provided.

**Training Plan**

**Business Skills:** This training will be offered to all occupations to improve efficiency and productivity by enabling new employees to understand and implement business strategies. Trainees will develop an overall knowledge and understanding of human interaction skills that are critical in a competitive environment.

**Computer Skills:** This training will be offered to all occupations on utilizing software systems in their job functions. Trainees will be able to implement more efficient processes that fully leverage the ERP technology investment.

**Manufacturing Skills:** This training will be offered to Production, Warehouse, Maintenance, Sanitation, Janitor, Quality Assurance, and Product Development staff. Training will include operation, preventive maintenance and repair of specialized machinery used in the manufacturing process. Trainees will also receive skills on product review from a customer's perspective.

**Continuous Improvement:** This training will be offered to all occupations. Training will develop decision-making skills and enhanced understanding of each trainee’s strengths and weaknesses. Trainees will also receive skills and techniques to decrease pollution and improve sustainability initiatives.

**Hazardous Materials:** This training will be offered to Production, Warehouse, Maintenance, Sanitation, and Manager/Supervisor. Training will ensure hazardous materials are handled in the safest manner possible.

**Computer-based Training (CBT)**

This training will be used to provide some training on Business Skills and Continuous Improvement at the employer site.
Commitment to Training

ETP funds will not displace the Company’s existing financial commitment to training. The Company spends $100,000 annually for training. The Company will continue to provide mandatory and job-specific training including orientation, anti-harassment and regulatory training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➢ Training Infrastructure

GSF is ready to start training upon approval of the Agreement. Training will be provided by in-house subject-matter experts. The Company has assigned a Training Supervisor, Human Resources Manager, and personnel from each facility to administer the Agreement. The Training Supervisor will be the key person in charge of the project.

Temporary to Permanent Hiring

GSF intends to train 20 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 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.

Trainees cannot be enrolled until after they have been hired by GSF into full-time, permanent employment. Until hired, retention and post-retention wage requirements cannot be satisfied and the Company will not receive progress payments.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by GSF 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>*ET16-0350</td>
<td>City of Industry</td>
<td>02/01/16 – 01/31/18</td>
<td>$426,352</td>
<td>$79,276</td>
<td>(19%)</td>
</tr>
<tr>
<td>ET13-0310</td>
<td>City of Industry</td>
<td>03/25/13-03/24/15</td>
<td>$243,000</td>
<td>$217,589</td>
<td>(90%)</td>
</tr>
<tr>
<td>ET12-0138</td>
<td>City of Industry</td>
<td>09/26/11-09/25/13</td>
<td>$195,570</td>
<td>$195,570</td>
<td>(100%)</td>
</tr>
</tbody>
</table>

*ET16-0350: GSF only performed 19% of total funding from this ETP Agreement. There was a change in the project administrator. During the period of transition, a number of training hours were not documented. Some training was delivered as Productive Lab, which was not an approved component of the Agreement. Additionally, thoroughly planned ISO 14001 certification was not delivered given the absence of a project administrator. This training represented a significant amount of the training plan. This project has been right-sized to the amount earned in prior project.
For the new ETP proposal, the Company has appointed GSW’s Training Supervisor as the new project administrator. Also, additional personnel resources have been allocated to assist with administration. Having an administrative team oversee the project will help ensure training is successful. Additionally, the Company hired a new employee to guide and train employees towards ISO 14001 certification.

**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
- Facilitation for Meetings and Presentations
- Project Management
- Train-the-Trainer

COMPUTER SKILLS
- Data Management
- Database Access & Management
- Enterprise Resource Planning
- Informance

CONTINUOUS IMPROVEMENT
- Change Management
- Conflict Management/Resolution
- Environmental Management System
- Goal Setting
- ISO 14001
- Leadership
- Problem Solving
- Product Evaluation
- Quality Control/Quality Assurance
- Root Cause Analysis
- Statistical Process Control
- Team Building
- Troubleshooting

HAZARDOUS MATERIALS
- Bloodborne Pathogens
- Chemicals
- Compressed Gases
- Hazard Communication
- Hazardous Material Handling
- Spill Response
- Storm Water Pollution Prevention

MANUFACTURING SKILLS
- Chemicals – Industrial
- Clean in Place
- Cross Contamination
- Forklift Train-the-Trainer
- Machine/Equipment Maintenance
- Machine/Equipment/Position Validation
- Manufacturing Process Changes & Upgrades
- Material Testing
- Product Evaluation
- Production Process
- Troubleshooting Equipment
- Warehouse Management
- Advanced Safety Skills
  - Back Safety & Ergonomics
  - Behavior Based Safety
  - Confined Spaces
  - Contractor Safety
  - Electrical Safety
  - Fall Protection
  - Hand Safety & Tool Handling
  - Heat Stress Prevention
  - Hoist & Rigging
  - Hot Work
  - Machine Guarding & Machine Safety
  - Pedestrian Safety
  - Personal Protective Equipment
  - Powered Industrial Vehicle Safety
  - Respiratory Protection
  - Walking & Working Surfaces

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

**CBT Hours**
0 – 20

**BUSINESS SKILLS (CBT)**
- Communication
  - Developing Your Reputation of Professionalism with Business Etiquette (1 hr)
- Introduction to Green Business and Sustainability (2 hr)
- Presentations
  - Basic Presentation Skills: Delivering a Presentation (1 hr)
  - Basic Presentation Skills: Planning a Presentation (1 hr)
- Time Management
  - Time Management: Analyzing Your Use of Time (1 hr)
  - Time Management: Avoiding Time Stealers (1 hr)
  - Time Management: Planning and Prioritizing Your Time (1 hr)
  - Time Management for Microsoft Outlook (1 hr)
  - Time Management Fundamentals (1 hr)

**CONTINUOUS IMPROVEMENT (CBT)**
- Leadership
  - Addressing Problem Performance (2.5 hr)
  - Choices to Extraordinary Productivity (2 hr)
  - Coaching Performance (2 hr)
  - Communication and Leadership (4 hr)
  - Energizing and Empowering Employees (2.5 hr)
  - Facilitative Fundamentals: Tools and Techniques (4.5 hr)
  - The Facilitator Role (4 hr)
  - Interpersonal Communication: Listening Essentials (1 hr)
  - Leadership and Change (1.5 hr)
  - Leadership Essentials: Motivating Employees (1 hr)
- Managing as Coach and Counselor (3.5 hr)
- Managing Change: Dealing with Resistance to Change (1 hr)
- Managing the Change Process (3 hr)
- Mentoring as Manager (2 hr)
- Relationship Trust (1 hr)
- Resolving Conflict with Communication Skills (3 hr)
- Starting the Change Process (3 hr)
- Using Feedback to Improve Team Performance (1 hr)

- Team Building
  - Being an Effective Team Member (1 hr)
  - Communication of a Shared Vision (5 hr)
  - Detecting and Dealing with Performance Problems (0.5 hr)
  - Elements of a Cohesive Team (1 hr)
  - Encouraging Team Communication and Collaboration (0.5 hr)
  - Establishing Team Goals and Responsibilities (1 hr)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
May 29, 2018

Gregg Griffin
Manager, North Hollywood Regional Office
Employment Training Panel
4640 Lankersheim Blvd., Suite 311
North Hollywood, California 91602-1841

Re: Application to Employment Training Panel for Golden State Foods

Dear Mr. Griffin:

Teamsters Local 63 represents employees at Golden State Foods, City of Industry. We support the training of the work force as it improves upon the skills of the workers we represent.

Therefore, Teamsters Local 63 supports Golden State Foods’ application for funding from the Employment Training Panel.

Fraternally,

Martin F. Perez
Business Representative/Coordinator
Teamsters Local 63

MFP/Is
RETRAINEE - JOB CREATION
Training Proposal for:
Greenheck Fan Corporation
Agreement Number: ET19-0156

Panel Meeting of: July 27, 2018
ETP Regional Office: Sacramento

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Priority Rate Retraine Job Creation Initiative</th>
<th>Industry Sector(s): Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Placer</td>
<td>Repeat Contractor: Yes</td>
</tr>
<tr>
<td>Union(s): Yes</td>
<td>Sheet Metal Workers' Local Union No. 104</td>
<td></td>
</tr>
<tr>
<td>Number of Employees</td>
<td>CA: 157</td>
<td></td>
</tr>
<tr>
<td></td>
<td>U.S.: 1,078</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Worldwide: 3,300</td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors</td>
<td>5% (% of total trainees)</td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

Program Costs - (Substantial Contribution) - (High Earner Reduction) = Total ETP Funding

$188,240 - $0 - $0 = $188,240

In-Kind Contribution: 100% of Total ETP Funding Required $195,585
## 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>Computer Skills, Cont. Imp., Mgmnt. Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills</td>
<td>60</td>
<td>8-200</td>
<td>0</td>
<td>$2,704</td>
</tr>
<tr>
<td></td>
<td>Priority Rate</td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 104</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Job Creation</td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 100</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: $16.70 per hour in Placer County;
- Job Number 2 (Job Creation): $13.66 per hour in Placer County.

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

### Used to meet the Post-Retention Wage?:
- ☑ Yes   ☐ No   ☐ Maybe   Up to $2.15 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>Administrative Staff</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Engineer</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Maintenance Tech</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Production Staff 1</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Production Staff 2</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Production Staff 3</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production Staff 3</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1947 and headquartered in Schofield, WI, Greenheck Fan Corporation (Greenheck) (www.greenheck.com) manufactures roof mounted fans, fans and ventilator products. Clients include hospitals, hotels, shopping malls, restaurants, schools and other commercial buildings. Training will take place at Greenheck’s single California location in Rocklin.

Need For Training

This is Greenheck’s fourth ETP Agreement, and second in the last five years Agreement. Previous training focused on new equipment training, Lean Manufacturing practices and software applications. Some training topics are similar to those provided in the previous Agreement; however, trainees will not receive any duplicate training. The training plan will upgrade trainee’s skills for advanced opportunities.

Greenheck has invested in new equipment including End of Line Crane for Packaging Louvers, New Plate Roller for Round Dampers, Manufacturing Integration and Intelligence Test Stations, Press Brake and Spot Welder. This equipment requires workers be trained on advanced procedures and maintenance techniques. In addition, the Company will continue to focus on Lean Manufacturing training to ensure improved effectiveness of the manufacturing process.

Training will include Management skills in Communication, Team Leadership and Supervision. This training will allow Managers and Supervisors to communicate more effectively with staff and upgrade their leadership skills. Additionally, training includes essential computer software. These courses include SAP, Manufacturing Integration and Intelligence and Intermediate and Advanced Microsoft Office. Greenheck is committed to creating a positive working environment to encourage retention and promotion.

Union Support

Union support letter from Sheet Metal Workers’ Local Union No. 104 for non-administrative and management workers at Greenheck has been received.

Retrainee - Job Creation

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

New manufacturing equipment will increase manufacturing capacity and the need for additional staff. The Company will hire 10 Production Staff (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

PROJECT DETAILS

Training Plan

Class/Lab and Productive Lab (PL) training will be provided in the following:

Management Skills: Training will be delivered to Managers and Supervisors and focus on increasing skills and effectiveness. Training topics will include Team Leader Training, Supervision Excellence and Communication Skills. These topics will touch on giving clear instructions, effective delegation, time management and cross-training.
**Computer Skills:** Training will be delivered to Administrative and Production Staff 1-3. Training topics will include SAP, Manufacturing Integration and Intelligence, and Intermediate and Advanced Microsoft Office. Training will raise the skill level of staff on systems and methods of operating that are key to their job duties.

**Continuous Improvement:** Training will be delivered to all occupations except Administrative Staff. Training topics include Lean Manufacturing 101 and 201. These courses will teach staff how to effectively perform their job duties. Additionally, as the Company continues to grow, training in Lean methods will eliminate waste and improve the manufacturing process.


**OSHA 10/30:** Training will be delivered to all occupations except Administrative Staff. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for Frontline Supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

**Productive Laboratory**

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

Training will be delivered to all Production Staff. Trainees will work with a trainer who will demonstrate step-by-step instructions and then observe trainees perform these tasks. Training will be provided in Dampers and Louvers. Trainees will learn to read/execute blue print designs, cut materials to appropriate specifications and wire actuator to accessories. Production will be impacted during training and more materials will be wasted due to error rate. Greenheck will provide approximately 39 PL Manufacturing hours at a 1:1 trainer-to-trainee ratio.

**Commitment to Training**

Greenheck allocates approximately $20,000 annually for training that includes new-hire orientation, staff development and safety 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 Infrastructure**

Greenheck has a detailed training plan in place and is ready to begin training upon approval. The Company’s Human Resources Generalist will oversee this training project. In addition, the Company has retained The Incentives Management Group, Inc. to assist with administration. Training will be delivered by in-house experts and vendors to be determined.

**RECOMMENDATION**

Staff recommends approval of this proposal.
PRIOR PROJECTS

The following table summarizes performance by Greenheck 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>ET13-0255</td>
<td>Rocklin</td>
<td>12/19/12 – 12/18/14</td>
<td>$32,400</td>
<td>$30,416 (94%)</td>
<td></td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

The Incentives Management Group, Inc. in Westport, CT assisted with development for a flat fee of $2,500.

ADMINISTRATIVE SERVICES

The Incentives Management Group, Inc. will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

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

**COMPUTER SKILLS**
- Intermediate and Advanced Microsoft Office
- Manufacturing Integration and Intelligence
- SAP

**CONTINUOUS IMPROVEMENT**
- Lean Manufacturing 101
- Lean Manufacturing 201

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

**MANAGEMENT SKILLS** (Managers/Supervisors Only)
- Communications Skills
- Supervision Excellence Training
- Team Leader Training

**MANUFACTURING SKILLS**
- Advanced HVAC Systems
- Air to Air Energy Recovery and Re-Humidification Systems
- Brazing
- Dampers
- Electronic Components
- Equipment Maintenance Program
- Grade 1 and 2 Cross Training
- Louvers
- Manufacturing Safety Training
- Press Brake Training
- Spot Welder Training
- Variable Air Volume Systems
- Water Cycle/Refrigeration Systems
- Water Source Heat Pump Systems

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

Productive Lab
0-39 Trainees may receive any of the following:

**MANUFACTURING SKILLS** (Ratio 1:1)
- Dampers
- Louvers

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
May 24, 2018

Employment Training Panel
1100 J Street
Sacramento, CA 95814

Re: Greenheck

Dear Panel Members:

This letter is an acknowledgment that Sheet Metal Workers' Local Union No. 104 supports the training plans and subsequent training grant put in place for Greenheck employees located at 170 Cyber Court, Rocklin, California.

Should you have any questions, please do not hesitate to contact me directly at (916) 922-1133 or armando@smw104.org.

Sincerely,

Armando Guerrero
Business Representative
District 2

ag: sb opeiu: 29/aflcio
RETRAINEE - JOB CREATION
Training Proposal for:
North State Electrical Contractors, Inc.
Agreement Number: ET19-0167
Panel Meeting of: July 27, 2018
ETP Regional Office: Sacramento Analyst: K. Jones

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Job Creation Initiative</th>
<th>Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Priority Industry: ☒ Yes ☐ No</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Sacramento</td>
<td>Repeat Contractor:</td>
<td>☐ Yes ☒ No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>☐ Yes ☒ No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 120</td>
<td>U.S.: 120</td>
<td>Worldwide: 120</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>12%</td>
<td></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>
<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>$153,400</td>
<td>$0</td>
<td>$0</td>
<td>$153,400</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $180,000
### 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>Retrainee Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, OSHA 10/30, PL - Comm Skills</td>
<td>110</td>
<td>8-200</td>
<td>0-1</td>
<td>$1,040</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
<td>$16.80</td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Priority Rate Job Creation Initiative</td>
<td>Business Skills, Commercial Skills, Computer Skills, OSHA 10/30, PL - Comm Skills</td>
<td>25</td>
<td>8-200</td>
<td>0-1</td>
<td>$1,560</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td></td>
<td>*$14.00</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: $16.80 per hour for Sacramento County. Job Number 2: $14.00 per hour for Sacramento County.

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

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

Up to $1.80 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>Foreman</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>Project Manager</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Estimator</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Electrician</td>
<td>70</td>
<td></td>
</tr>
<tr>
<td>Operation Staff</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foreman</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Project Manager</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Estimator</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Electrician</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>Operation Staff</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 2006 and headquartered in Rancho Cordova, North State Electrical Contractors, Inc. (North State) ([https://www.northstate-eci.com/](https://www.northstate-eci.com/)) is a family-owned and -operated electrical contracting company specializing in installation, repair, and maintenance of a variety of electrical systems. The Company also provides electrical contracting services to residential and commercial clients in new construction and rehab projects throughout Northern California. This will be the Company’s first ETP Agreement. Training will be conducted at the Rancho Cordova location.

PROJECT DETAILS

Training is driven by North State’s recent expansion into the Telecommunications industry to meet customer demand for technologically advanced communication systems. Staff must be trained in wire, radio, and fiber optic telecommunication systems to ensure trainees can install and service these systems.

North State is also experiencing increased demand for electrical installations in new-construction, multi-family homes. Multi-family home construction comes with unique building and code requirements. Training in multi-family home construction is required to ensure trainees have the knowledge and skills to complete electrical installations.

Training Plan

Training will be provided using the Class/Lab, E-Learning, Productive Laboratory and Computer Based Training (CBT) delivery methods by a combination of internal subject-matter experts and vendors.

Business Skills: Training will be offered to all occupations. Trainees will receive Customer Service, Product Knowledge, Leadership, Communication Skills, and Time Management to increase client satisfaction and productivity.

Commercial Skills: Training will be offered to all occupations. Trainees will receive technical job skills needed to support the Company’s product offerings, services and customers. Training topics include Building Systems, Audio Visual Products, Dimmers, Construction: Job Site Sequencing, Electrical Equipment, Telecommunication Overview, and Work Order Processing.

Computer Skills: Training will be provided to all occupations to improve internal processes and increase proficiency in various electrical software systems. Training topics include Bluebeam Software, Dexter+Chaney/Viewpoint Software, McCormick Software and PlanGrid Software.

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 and manufacturing work. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Computer-Based Training

CBT will support Class/Lab and E-Learning training. Trainees in Job Numbers 1 and 2 will receive no more than 1 hour of training. The course topic offered through CBT is Safety Overview – Equipment Usage, Ladder, and Heat exhaustion.
Productive Laboratory (PL)

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

North State will train 39 Electricians in electrical and construction practices. Topics are delivered in the classroom first to introduce trainees to electrical concepts. PL training is necessary to ensure safety and construction standards are being met. Training will be at a much slower pace with significantly higher defects as trainees gain proficiency.

Training will be conducted by subject-matter experts who will first demonstrate construction techniques and then supervise trainees performing the task. The trainer will confirm trainee competency once training is completed. Due to the nature of construction, such training cannot be reproduced in a classroom setting.

The Company requests a 1:2 trainer-to-trainee ratio since electricians work in groups of two during construction. Trainees will receive an average of 20 hours.

Retrainee - Job Creation

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

North State recently expanded into the telecommunications industry. The Company was awarded telecommunications contracts with two commercial builders that are expected to generate more than $1 million in revenue. The Company will hire 25 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.

Commitment to Training

North State spends in excess of $100,000 per year on training. The Company provides the following training: new hire orientation, safety training, California labor laws and regulations, basic computer skills, violence in the workplace prevention, and sexual harassment prevention.

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

Training Infrastructure

The Safety Manager and Superintendent will coordinate and schedule training. The Chief Financial Officer (CFO) will review rosters to ensure ETP documentation requirements are met. The Company will also utilize a third party administrator, Sierra Consulting Services, Inc. to assist with ETP administrative requirements.

RECOMMENDATION

Staff recommends approval of this proposal.
DEVELOPMENT SERVICES

North State retained Sierra Consulting Services, Inc. of El Dorado Hills to assist with development of this proposal for a flat fee of $15,000.

ADMINISTRATIVE SERVICES

Sierra Consulting Services, Inc. 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.
Menu Curriculum: Exhibit B

Class/Lab and ELearning Hours

8 – 200: Trainees may receive any of the following:

**BUSINESS SKILLS**

- Administration
- Business Fundamentals
- Business Writing
- Coaching
- Communication Skills
- Conflict Resolution
- Cost Control
- Creative Marketing
- Customer Service
- Decision Making
- Effective Meetings
- Employee Engagement
- Financial Analysis
- Leadership
- Negotiating
- Operational Skills
- Planning and Organization
- Problem Solving and Decision Making
- Product Knowledge
- Project Management and Methodology
- Property and Resource Management Skills
- Relationship Building
- Strategic Planning
- Teambuilding
- Time Management

**COMMERCIAL SKILLS**

- Audio Visual Products
- Building Systems
- Construction Overview
- Construction: Job Site Preparation
- Construction: Job Site Sequencing
- Construction: Methodologies
- Dimmers
- Electrical Equipment
- Electrical Installation
- Electrical Programming
- Electricity Overview
- Energy & Environmental Design for Green Building
- Engineering Theory/Planning/Design
- Equipment Operation
- Equipment Safety
• Kaizen Processes
• LED Systems
• Lighting
• Multifamily Electrical Wiring
• Process Improvement
• Production Scheduling
• Quality Measurement Systems
• Switches
• Systems Failure Analysis
• Telecommunication Equipment
• Telecommunication Overview
• Visual Controls
• Work Order Processing

**COMPUTER SKILLS**
• Autodesk/AutoCAD
• Bluebeam Software
• Click Safety Software
• Customer Relationship Management (CRM) Software
• Dexter+Chaney/Viewpoint Software
• Estimating Software
• Intermediate/Advanced Microsoft Office
• McCormick Software
• PlanGrid Software

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

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

**CBT Hours**

0 – 1 Trainees may receive any of the following:

**Computer Based Training (CBT)**
• Safety Overview – Equipment Usage, Ladder, and Heat Exhaustion (45 Minutes)

**Productive Lab Hours**

0 – 20 Trainees may receive any of the following:

**COMMERCIAL SKILLS** (trainer-to-trainee ratio 1:2)
• Audio Visual Installation
  o Audio Visual Troubleshooting
• Blue Print Reading
• Dimmer Installation
• Electrical Programming/Set-Up
• Electrical Systems Installation
  o Clash Troubleshooting
  o Commercial Building Romex Installation
- Multifamily Building Romex Installation
  - Electrical Wiring Installation
  - Forklift Operation
  - LED System Installation
  - Lighting Installation
  - Scissor Lift Operation
  - Switch Installation
  - Telecommunication Equipment Installation
    - Telecommunication Equipment Troubleshooting

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

Paradigm Treatment Centers, LLC

Agreement Number: ET19-0168

Panel Meeting of: July 27, 2018

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>Medical Skills Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td></td>
<td></td>
<td>Healthcare Services</td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>☒ Yes</td>
<td>☐ No</td>
<td></td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Los Angeles and Marin</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: 104</td>
<td>U.S.: 104</td>
<td>Worldwide: 104</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

Program Costs - (Substantial Contribution) - (High Earner Reduction) = Total ETP Funding

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>$197,600</td>
<td>$0</td>
<td>$0</td>
<td></td>
<td>$197,600</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $451,040
**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</td>
<td>Business Skills, Computer Skills, Commercial Skills, MS - Didactic, MS - Preceptor</td>
<td>95</td>
<td>8-200</td>
<td>0</td>
<td>$2,080</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $17.54 per hour for Los Angeles County and $18.22 per hour for Marin 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.

<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>10</td>
</tr>
<tr>
<td>Medical Professionals</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Mental Health Therapists</td>
<td></td>
<td>25</td>
</tr>
<tr>
<td>Nurses</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>Clinical Assistants</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>Support Staff</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>Managers/Supervisors</td>
<td></td>
<td>10</td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 2013, and headquartered in Malibu, Paradigm Treatment Centers, LLC (Paradigm) (www.paradigmmalibu.com) offers residential mental health treatment for adolescents. Families come to Paradigm from all parts of the United States and abroad seeking treatment of mental health issues for their teenage children treatment for depression, anxiety, trauma, grief, substance abuse, addiction, eating disorders. ETP training will take place at all five Paradigm facilities in California (four in Malibu and one in San Rafael). This will be Paradigm’s first ETP Agreement.

Paradigm is dedicated to identifying and properly treating core issues that impact adolescents and their families through their residential mental health treatment program. The Company uses evidenced based treatment coupled with traditional and alternative modalities. In order to remain competitive and continue to give excellent care, Paradigm must train employees in the newest methods and issues in mental health treatment.
PROJECT DETAILS

Training will be provided to all employees who interact with patients and must be adept at recognizing and handling mental health issues. Courses will provide advanced and in-depth mental health treatment skills allowing Paradigm to deliver the most effective treatment possible.

Training will also be provided to newly graduated therapists. There is a 6:1 staff-to-client ratio. Because treatment plans vary per individual, staff must be versed in many areas. This training will prepare therapists for upward mobility and continuous career growth in the mental health field.

ETP funding will provide Paradigm with the extra resources needed to bring quality training to employees while continuing to provide quality care to clients.

This is Paradigm’s first ETP project.

Training Plan

Trainees will receive 8–200 hours of training. Training will be provided by in-house experts and training vendors in specialized medical skills topics. The Contractor has identified All About Interventions as a specialized mental health training vendor being utilized for training.

Medical Skills (MS) - Didactic and Preceptor training will be provided to Medical Professionals, Mental Health Therapists, Nurses, and Clinical Assistants. Training will provide staff with a well-rounded knowledge of every aspect of patient care and effectively work with adolescents in a 24-hour residential setting. Training will cover individual therapy, group facilitation, family therapy, client interventions, utilization reviews, and treatment plans.

For the MS Preceptor, each trainee will work closely with an assigned trainer to ensure competency in providing hands-on assistance to patients, as well as demonstrate they can perform medical related tasks.

Commercial Skills - Training will be offered to all occupations and will focus on suicide and other patient risk assessments, infection control and hand hygiene and working with resistant clients. This training will provide trainees the skills necessary to ensure they are aware of their role, responsibility, and accountability to enhance patient experience by ensuring excellent quality care.

Business Skills - Training will be offered to all occupations. Paradigm’s staff is comprised of professionals with diverse life experiences collaborating to support the healing process for each individual youth. Teambuilding trainings are essential in making sure staff are able to cooperate and work together synergistically. Topics include teambuilding and dealing with difficult situations. Other training will include guidelines related to the Joint Commission Standards of Care.

Computer Skills – Training will be offered to all occupations. Course topics include Electronic Medical Record Skills and Paradigm’s software programs. Additional training will be provided to Administrative and Support staff on how to effectively use Human Resource and Payroll software programs, along with software upgrades to these specific systems.

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 is approximately $100,000 for all training including new-hire orientation, annual compliance, and skills competency.

- Training Infrastructure

The CEO, Clinical Director, Executive Director, and three Program Directors will oversee project administration. The Human Resources Director, CEO, and the Executive Director will be responsible for meeting with ETP staff. The Company has contracted with RSM US LLP, to assist in the administrative process.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

Paradigm retained RSM US LLP in Los Angeles to assist with development of this proposal for a flat fee of $7,000.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

All About Interventions of West Hollywood has been retained to provide Medical Skills-Didactic training for a fee of $10,000. Other trainers will be identified for ETP record-keeping purposes, as they are retained by Paradigm.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Time Management
- Project Management
- Joint Commission Standards of Care
- Teambuilding
- Communications

**COMPUTER SKILLS**

- Electronic Medical Records Skills
- Company Software
- Human Resources Software
- Payroll Software

**COMMERCIAL SKILLS**

- Assessment - Suicide and Other Risks
- Client Rights, HIPAA, and Client Confidentiality
- Community Relations and Good Neighbor Policy
- Creating Formal and Informal Support Systems
- Crisis Response and De-escalation
- Infection Control Hand Hygiene
- Working with Families: Assessment, Intervention, and Mapping
- Working with Resistant Clients
- Working with youth with health issues

**MEDICAL SKILLS - DIDACTIC**

- Attachment and Adolescent Care
- Cognitive Behavioral Therapy (CBT)
- Clinical Care
- Clinical Notation, Treatment Planning, Discharge
- Dialectical Behavioral Therapy (DBT)
- Emergency Management
- Ethics and Boundaries in Mental Health
- Evidenced-Based Practices
- Group Therapy
- Medication Management
- Mindfulness and Self-Care for Clients
- Motivational Client Interviewing for Substance Abuse
- Solution Focused Therapy
- Substance Abuse and Co-Occurring Treatment
- Trauma Informed Care
- Urine Drug Screen (UDS) and Universal Precaution

**MEDICAL SKILLS - PRECEPTOR (1:1-3)**

- Assessment - Suicide and Other Risks
- Cognitive Behavioral Therapy (CBT)
- Clinical Care
- Clinical Notation, Treatment Planning, Discharge
- Crisis Response and De-escalation
- Dialectical Behavioral Therapy (DBT)
- Emergency Management
- Group Therapy
- Medication Management
- Mindfulness and Self-Care for Clients
- Motivational Client Interviewing for Substance Abuse
- Solution Focused Therapy
- Substance Abuse and Co-Occurring Treatment
- Trauma Informed Care
- Urine Drug Screen (UDS) and Universal Precaution
- Working with Families: Assessment, Intervention, and Mapping
- Working with Resistant Clients
- Working with youth with health issues

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

Ricoh USA, Inc.

Agreement Number: ET19-0148

Panel Meeting of: July 27, 2018

ETP Regional Office: San Diego

Analyst: M. Ibarra

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraineen SET HUA</th>
<th>Industry Sector(s):</th>
<th>Services Technology/Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Statewide</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: 2,325</td>
<td>U.S.: 24,233</td>
<td>Worldwide: 109,361</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>17%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>☒ 1%</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>$199,456</td>
<td>$0</td>
<td>$0</td>
<td>$199,456</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $292,933
## 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</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement</td>
<td>14</td>
<td>8 - 200</td>
<td>0 - 100</td>
<td>$644</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 28</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee SET</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement</td>
<td>140</td>
<td>8 - 200</td>
<td>0 – 100</td>
<td>$966</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 42</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Retraine SET HUA</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement</td>
<td>50</td>
<td>8 - 200</td>
<td>0 – 100</td>
<td>$1,104</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 48</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:
- Job Number 1 (Retrainees): $17.50 per hour in Orange County;
- Job Number 2 (SET Retrainees): Statewide Average Hourly Wage of $30.36;
- Job Number 3 (SET/HUA Retrainees): $12.53 per hour in Fresno and San Joaquin 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 ☐

Health Benefits of up to $2.27 per hour may be used to meet the Post-Retention Wage for Job Numbers 1 and 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>Supply Chain/Distribution Center Staff</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Operations Support Staff</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Information Technology Staff/Technician</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Sales Staff</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2 (SET):</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supply Chain/Distribution Center Staff</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Operations Support Staff</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Information Technology Staff/Technician</td>
<td>95</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1962, Ricoh USA, Inc. (Ricoh) (www.ricoh-usa.com) engages in the distribution, import, marketing, sale, and service of digital office equipment including color, black & white, and multi-functional products such as copiers, printers, facsimile systems, scanners, digital duplicators, wide format copiers, digital cameras, projectors, and network accessories. The Company also offers managed document and information technology services. Ricoh serves large to medium-sized companies requiring high volume, high speed, and multiple finishing capabilities as well as small-sized business and individuals requiring multi-function production.

Under its parent company, Ricoh Company, Ltd., Ricoh is headquartered in Pennsylvania and maintains locations throughout North America, Latin America, Europe, the Middle East, Africa, Asia/Pacific, and Japan.

This will be the fifth Agreement between Ricoh and ETP, the second within the last five years. The proposed training plan will target approximately 204 workers in 45 California facilities located in the following cities: Tustin, Campbell, Cerritos, Concord, Culver City, Cupertino, Fresno, Glendale, Hayward, Irvine, Los Angeles, Mountain View, Oakland, Ontario, Petaluma, Rancho Cordova, South San Francisco, Sacramento, San Diego, San Francisco, San Jose, San Mateo, Stockton, Vacaville, and Walnut Creek.

In its previous projects, training focused on the shift of the Company’s business model and implementation of a new Enterprise Resource Planning system. Training also focused on implementation of new products and services as well as process improvement initiatives. Ricoh was able to provide its workforce the skills to support new services in workflow consulting, improve security access, content management development, and network business applications, as a result of acquiring a cloud computing and support organization.

PROJECT DETAILS

In this proposal, training is driven by the following company-wide changes occurring within Ricoh:

1. Growth – In 2016, Ricoh launched electro-mechanical and networking service capabilities for products in secure shipping/receiving lockers, robotics for retail and warehousing, and autonomous retail kiosks, through a new program called Ricoh Service Advantage. Ricoh has experienced increased revenues and projects continued growth. This growth To support this growth, the Company plans to hire approximately 50 new workers.

2. Certifications – Ricoh is revising its Technology Services Certification program which establishes training and certification requirements. The certification program will include non-product specific advanced skills training targeted to improve technician’s ability to support growing complexity of its customer partnerships. The Company plans to train all its Technicians to complete the necessary certification requirements.
3. **Products** – Ricoh recently launched a new DC/DC converter used in energy harvesting devices to collect and store energy obtained from sources such as solar or vibration. Target applications include wearables for sports and healthcare, wireless sensors, and Internet of Things (IoT) devices. The Company is also designing and developing other new products and technologies that will be launched during the term of the proposed ETP Agreement.

Training will enable Ricoh to provide supplemental training to its incumbent and newly-hired California workers to successfully support the Company’s growth, process improvement initiatives, and business methodologies for new products and services.

**Training Plan**

The proposed training plan may include employees who have participated in previous contracts and some curriculum topics are repeated. However, curriculum has been updated, so there will be no duplication of training in those courses. Although Ricoh did not include a Job Creation component in the proposed training plan, the trainee population has been expanded to include newly-hired employees who have not received training in the past.

Training will be provided in the following skills:


**Commercial Skills** – Training topics include Cloud Services Development, New/Upgraded Technologies, Networking/Security, and Technology Solutions Installation/Maintenance.

**Computer Skills** – Training topics include Advanced Microsoft Office Skills, eForms Solutions, Customer Relationship Management (CRM) System, and Ricoh Certifications.

**Continuous Improvement** – Training topics include Leadership Development, Problem Solving/Decision Making Skills, Process & Quality Improvement Techniques, Project/Program Management, and Time Management.

**Computer-Based Training (CBT)**

To support Class/Lab training, Ricoh will also provide CBT in Business, Computer, and Continuous Improvement Skills. CBT will allow trainees to train at their own pace and will be provided prior to or subsequent to a Classroom/Instructor-Led training to ensure learning/skills transfer has occurred.

**Commitment to Training**

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

Ricoh’s annual training budget for its California facilities is approximately $1.3M. The Company provides ongoing basic job skills; new employee orientation; diversity; performance management skills; anti-harassment; extensive on-the-job and ride-along; introductory computer skills; interviewing skills; and selecting and assessing talent skills training. Certain topics such as anti-harassment and diversity are mandatory for all employees. Employees are also encouraged or
elected to receive training based on their needs by specific job function. These trainings are provided at Ricoh’s expense during and beyond the term of the proposed Agreement.

- Training Infrastructure

Ricoh plans to contract with an administrative subcontractor to assist with ETP project administration. The Project Manager, along with the LMS Administrator, will oversee the project including scheduling, delivering, documenting, and managing training for all California facilities. The Program Manager will also meet with ETP staff and work with Ricoh’s third-party administrator. Ricoh’s Director of Organizational Development and Effectiveness has overall responsibility of the project.

Trainers at each participating location will be responsible for entering training data. As a Learning and Development Organization, Ricoh’s trainers are responsible for training coordination and facilitation. The coordination takes place prior to the class and the trainer then facilitates the class, as well as logs a completed class in the LMS.

Training will be delivered by in-house instructors and vendors, as needed. Ricoh provides ongoing training; however, documentation of ETP-eligible training will start upon contract approval.

Special Employment Training (Job Numbers 2 & 3)

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be frontline workers earning at least the statewide average hourly wage of $30.36 at the end of the retention period.

SET/HUA Wage Modification (Job Number 3)

The 50 SET trainees in Job Number 3 work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by 25%, under the Panel’s standards. The determination of HUA status is based on unemployment data from the Labor Market Information Division of the Employment Development Department. Ricoh is requesting a wage modification in order to serve workers in lower-wage occupations at its locations in the cities of Fresno and Stockton which qualify for HUA status under these standards.

Electronic Recordkeeping

Ricoh will utilize a Learning Management System (LMS) to schedule training and track training attendance. The system was once again reviewed and approved by ETP Staff.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Ricoh 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>*ET15-0420</td>
<td>Statewide</td>
<td>5/4/15-5/3/17</td>
<td>$137,850</td>
<td>$126,971</td>
<td>(92%)</td>
</tr>
<tr>
<td>ET12-0418</td>
<td>Statewide</td>
<td>6/30/12-6/29/14</td>
<td>$189,810</td>
<td>$138,592</td>
<td>(73%)</td>
</tr>
</tbody>
</table>

*ET15-0420: Ricoh documented 9,457 eligible training hours for 190 trainees who completed retention (weighted average training hours of 50) to equal $126,971 (92% of the Agreement amount) payment earned.

**DEVELOPMENT SERVICES**

Ricoh retained Training Funding Partners (TFP) in Fountain Valley to assist with development of this proposal for a flat fee of $9,700.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Advanced Sales Skills
- Business Process Skills
- Customer Service/Support Skills
- Finance/Accounting Skills
- New/Upgraded Products and Services
- Presentation Skills
- Supply Chain Management
- Train-the-Trainer

**COMMERCIAL SKILLS**
- Cloud Services Development
- New/Upgraded Technologies
- Networking/Security
- Technology Solutions Installation/Maintenance

**COMPUTER SKILLS**
- Advanced Microsoft Office Skills
- eForms Solutions
- Customer Relationship Management (CRM) System
- Microsoft Certification
- Ricoh Certifications

**CONTINUOUS IMPROVEMENT**
- Leadership Development
- Problem Solving/Decision Making Skills
- Process & Quality Improvement Techniques
- Project/Program Management
- Time Management

CBT Hours

0 – 100

**BUSINESS SKILLS**
- Meeting Room Services for Operations (1 hour)
- Meter Reads Tools for MS Employees (1 hour)
- MS SET 04.01 Copy Center Basics (0.6 hour)
- MS SET 04.03 Grading and Scheduling (0.43 hour)
- Section 3: Rules for Legal Preservation and Discovery (0.25 hour)
- Section 4: The Unique Challenges of Managing Electronic Records (0.25 hour)
- SET 04.02 Job Workflow (0.38 hour)
- SET 04.05 Finishing and Binding (0.5 hour)
- SET 04.06 Producing Quality Copy Work (0.77 hour)
• Working Together: Ricoh and the Supply Chain Process Flow (1 hour)

• **Communication Skills**
  • Art of Communication (1.25 hours)
  • Business Communication Fundamentals (1.5 hours)
  • Communicating Up: 01-Communicating to Your Manager (0.25 hour)
  • Communicating Up: 02-Your Manager's Communication Style (0.25 hour)
  • Communicating Up: 03-Your Path to Communicating Up (0.25 hour)
  • Essential Skills of Communicating: 02-Craft Clear and Concise Messages (0.25 hour)
  • Essential Skills of Communicating: 03-Deliver Messages Designed for the Team Member (0.25 hour)
  • Essential Skills of Communicating: 04-Listen To Communicate (0.25 hour)
  • Essential Skills of Communicating: 05-Manage Nonverbal Behavior (0.25 hour)
  • Essential Skills of Communicating: 06-Impactful Feedback (0.25 hour)
  • Essential Skills of Communicating: 07-Mastering Essential Skills of Communicating (0.25 hour)
  • Essential Skills of Communicating: 08-Essential Skills of Communicating Health Check (0.25 hour)
  • Foundations for New Managers: Gaining Commitment Through Effective Communication (0.75 hours)
  • Increase Your Listening & Communication Power (1 hour)
  • Powerful Communication Skills (1.6 hours)

• **Conflict Resolution**
  • Resolving Conflicts: 01-Characterizing Conflict (0.25 hour)
  • Resolving Conflicts: 02-Know Your Conflict Behavior (0.25 hour)
  • Resolving Conflicts: 03-Identifying Conflict Behaviors (0.25 hour)
  • Resolving Conflicts: 04-Your Path to Resolving Conflicts (0.25 hour)

• **Service-Led Customer Service Approach**
  • Calming Upset Customers (1 hour)
  • Connecting with Customers Through Customer Service (1 hour)
  • Customer First - Winning Spirit (0.42 hour)
  • Customer First and Innovation (0.42 hour)
  • Customer First and Teamwork (0.33 hour)
  • Customer First Workshop (0.33 hour)
  • Foster a customer-oriented culture (Essential) (EJNE642) (0.25 hour)
  • Foster a customer-oriented culture (Session) (OJNE642) (0.33 hour)
- Helping Customers through Quality Service (0.33 hour)
- INSPIRE Customer First (0.25 hour)

**New/Updated Product Skills**
- @Remote Introduction (3.5 hours)
- Amazon Locker Self Paced Training (2 hours)
- CAC/PIV v3 MFP Blended Learning Part 1 (3 hours)
- D117 D118 Self Pace Training (4 hours)
- D127_D128_Self_Pace Service Training (4 hours)
- Device Manager NX Accounting Self Paced (1.5 hours)
- Device Manager NX Ent/Pro Tier 1 (5 hours)
- Device Manager NX Lite Self-Paced Training (1.5 hours)
- Digital Color Basics Self Paced (16 hours)
- Fiery Part 1 Advanced Features (5 hours)
- Fiery Part 1 Features and Terminology (5 hours)
- Fiery Part 1 Introduction (1 hour)
- Fiery Part 1 Introduction (1 hour)
- Fiery Part 1 Product Overview (1 hour)
- Fiery Part 1 Production Print Overview (1 hour)
- Fiery Part 1 Support (2 hours)
- Fiery System Blended Learning Part 1 - Section 1 (1 hour)
- Fiery System Blended Learning Part 1 - Section 3 (12 hours)
- Fiery System Blended Learning Part 1 - Section 4 (1 hour)
- First Responder Trouble Resolution (2 hours)
- Image Formation for HP Printers (1.5 hours)
- Introduction to the SMC Report (0.5 hour)
- IPA Module 1 Overview (0.75 hour)
- IPA Module 10 LMSclearView (1 hour)
- IPA Module 2 LVD (1 hour)
- IPA Module 3 LVR (0.75 hour)
- IPA Module 4 MV (0.75 hour)
- IPA Module 5 SV (0.75 hour)
- IPA Module 6 DVE (0.75 hour)
- IPA Module 7 SD (0.75 hour)
- IPA Module 8 aLC (0.75 hour)
- IPA Module 9 mLc (0.75 hour)
- M080 Self Paced Service Training (16 hours)
- MP 2555 Part 1 Overview (2 hours)
- MP 2555 Self Paced Part 3 - Scanner (2 hours)
- MP 2555 Self Paced Part 6 - Toner Supply (2 hours)
- MP 2555 Self Paced Training Part 10 - Maintenance (2 hours)
- MP 2555 Self Paced Training Part 4 - Laser Unit (2 hours)
- MP 2555 Self Paced Training Part 5 - PCDU (2 hours)
- MP 2555 Self Paced Training Part 7 - Transfer (2 hours)
- MP 2555 Self Paced Training Part 8 - Paper Feed (2 hours)
- MP 2555 Self Paced Training Part 9 - Fusing (2 hours)
- MP 2555 Training Part 2 - Installation (2 hours)
- MP 2555 Update Training (1 hour)
- MP 4002/MP 5002 Series Self Pace (4 hours)
• MP 501SPF MP 601SPF Service Self Pace Training (4 hours)
• MP 6503 (D223) Series Self Pace Update (6 hours)
• MP C2003 (D176) Series Self Paced Update (2.67 hours)
• MP C3004 (D238) Series Module 1 - Documentation and Product Overview (2 hours)
• MP C3004 (D238) Series Module 10 - Fusing (2 hours)
• MP C3004 (D238) Series Module 2 - Installation (2 hours)
• MP C3004 (D238) Series Module 4 - Scanner (2 hours)
• MP C3004 (D238) Series Module 5 - Laser Unit (2 hours)
• MP C3004 (D238) Series Module 6 - PCDU (2 hours)
• MP C3004 (D238) Series Module 7 - Toner Supply (2 hours)
• MP C3004 (D238) Series Module 8 - Image and Paper Transfer (2 hours)
• MP C3004 (D238) Series Module 9 - Paper Feed (2 hours)
• MP C3004/MP C3504 (D238) Update Training for Service Professionals (2 hours)
• MP C306/MP C406 (D220/D196) Technical Training (5 hours)
• MP C401 D191 Family Self Pace (6 hours)
• MP C6503 Pro 5200S Series Update Machine Overview (2 hours)
• MP C6503 Pro C5200 Series Product Overview (0.5 hour)
• MP C6503 Pro C5200 Series Removal Adjustments Procedures (1.5 hours)
• MP C6503 Pro C5200S Series ADF (0.25 hour)
• MP C6503 Pro C5200S Series Drawer Unit (0.25 hour)
• MP C6503 Pro C5200S Series Fusing Unit (0.5 hour)
• MP C6503 Pro C5200S Series Installation (0.75 hour)
• MP C6503 Pro C5200S Series ITB (0.5 hour)
• MP C6503 Pro C5200S Series Laser (0.25 hour)
• MP C6503 Pro C5200S Series Paper Feed (0.75 hour)
• MP C6503 Pro C5200S Series PCDU (0.25 hour)
• MP C6503 Pro C5200S Series Process Control & Toner Supply (0.75 hour)
• MP C6503 Pro C5200S Series PTB (0.5 hour)
• MP C6503 Pro C5200S Series Scanner (0.25 hour)
• MP C6503 Pro C5200S Series Technology (0.75 hour)
• MP C6503 Pro C5200S Series Troubleshooting and Resources (0.5 hour)
• MP C6503 Pro C5200S Series Update Introduction (2 hours)
• MP CW2201SP/CW2200SP (D262/D124) Blended Learning Tier 1 (6 hours)
• MP W7100/W8140 (D208/D211) Series Part 1 - Overview (1 hour)
• MP W7100/W8140 (D208/D211) Series Part 2 - Optional Scanner & Component ID (1 hour)
• MP W7100/W8140 (D208/D211) Series Part 3 - Replacement & Adjustment Overview with Detailed Descriptions (1.5 hours)
• MP W7100/W8140 (D208/D211) Series Part 4 - Detailed Descriptions Cont'd (1.5 hours)
• NICE Online Training (3 hours)
• Oracle Field Service Cloud Mobility Module 1 Part 1 Overview
- Oracle Field Service Cloud Mobility Module 1 Part 2 Software Interface (0.5 hour)
- Oracle Field Service Cloud Mobility Module 10 Team Lead Functions (0.5 hour)
- Oracle Field Service Cloud Mobility Module 11 Next Steps (0.5 hour)
- Oracle Field Service Cloud Mobility Module 2 Part 1 Punch In (1 hour)
- Oracle Field Service Cloud Mobility Module 2 Part 2 Call with Parts (1.5 hours)
- Oracle Field Service Cloud Mobility Module 2 Part 3 Incomplete for Parts (0.5 hour)
- Oracle Field Service Cloud Mobility Module 3 Part 1 Service Estimate (0.5 hour)
- Oracle Field Service Cloud Mobility Module 3 Part 2 Cancel/Phone Fix (0.5 hour)
- Oracle Field Service Cloud Mobility Module 3 Part 3 Retag (0.5 hour)
- Oracle Field Service Cloud Mobility Module 3 Part 4 Wrong Machine (0.5 hour)
- Oracle Field Service Cloud Mobility Module 4 Part 1 Add Internal Activities (0.5 hour)
- Oracle Field Service Cloud Mobility Module 4 Part 2 Expenses (1 hour)
- Oracle Field Service Cloud Mobility Module 4 Part 3 Lunch (0.5 hour)
- Oracle Field Service Cloud Mobility Module 4 Part 4 Override (0.5 hour)
- Oracle Field Service Cloud Mobility Module 4 Part 5 Request Assistance (0.5 hour)
- Oracle Field Service Cloud Mobility Module 4 Part 6 Feedback Form (0.25 hour)
- Oracle Field Service Cloud Mobility Module 6 Calendaring (0.5 hour)
- Oracle Field Service Cloud Mobility Module 7 General Activities (2 hours)
- Oracle Field Service Cloud Mobility Module 8 Punch Out, End of Day (0.5 hour)
- Oracle Field Service Cloud Mobility Module 9 Working Offline (0.5 hour)
- Parts Documentation Overview (1 hour)
- Plockmatic PBM350/PBM500 Blended Learning Part 1 (2 hours)
- Plockmatic PBM350/PBM500 Self Paced Update (1 hour)
- PM Counters and the SMC Report (0.5 hour)
- Printing Technology Self Paced Training (5 hours)
- Pro 8200 (D270) Series Part 1 Technical Training (4 hours)
- Pro 8200 Series Self Pace Update (2 hours)
- Pro C7100 (D194) Blended Learning Part 1 (5.5 hours)
- Pro C9100/C9110 Pro 901 Series Blended Learning Part 1
Chapter 1 - Program Introduction (0.5 hour)
- Pro C9100/C9110 Pro 901 Series Blended Learning Part 1

Chapter 2 - Product Overview (1 hour)
- Pro C9100/C9110 Pro 901 Series Blended Learning Part 1

Chapter 3 - Process Descriptions (1.5 hours)
- Pro C9100/C9110 Pro 901 Series Blended Learning Part 1

Chapter 4 - Installation (1 hour)
- Pro C9100/C9110 Pro 901 Series Blended Learning Part 1

Chapter 5 - Maintenance & Troubleshooting (1 hour)
- Pro C9100/C9110 Pro 901 Series Blended Learning Part 1

Chapter 6 - Pro C901 Series Overview and Differences (1 hour)
- Pro C9100/C9110 Pro 901 Series Blended Learning Part 1

Chapter 7 - Summary (0.5 hour)
- Pro C9100/C9110 Pro 901 Series Blended Learning Part 1

RICOH Intelligent Delivery Services: FlexSystems (0.5 hour)
- RICOH Intelligent Delivery Services: OPEX and Image Architects Demonstration (1.25 hours)
- Ricoh Ri 3000/6000 Introduction (0.5 hour)
- Ricoh Ri 3000/6000 Module 1 (1 hour)
- Ricoh Ri 3000/6000 Module 2 (1 hour)
- Ricoh Ri 3000/6000 Module 3 (1 hour)
- Ricoh Ri 3000/6000 Module 4 (1 hour)
- Ricoh Ri 3000/6000 Module 4 Tech (1 hour)
- Smart Operation Panel v1 (D148-81) Self Paced Training (1.5 hours)
- SP 5200/SP 5210 Self Paced (M052/M020) (24 hours)
- SP4510 SP3600 (M160/M171) Series Self Pace (6 hours)
- Substrate Fundamentals (3 hours)
- The Perfect Service Call (4 hours)
- Toner Yield and Parts Yield (0.67 hour)
- Troubleshooting Copy Quality and the SMC Report (0.5 hour)
- Troubleshooting Paper Jams and the SMC Report (0.75 hour)
- Troubleshooting SC Codes and the SMC Report (0.33 hour)
- Xante Impressia Envelope Feeder Training (4 hours)
- Xante Impressia Printer Training (7 hours)

**Advanced Sales Skills**
- Effective Presentation Skills (1 hour)
- CONNECT With the Future - Sales (0.32 hour)
- CONNECT with the Right Resources - Sales (0.25 hour)
- DRIVE Effectiveness and Efficiency - Sales (0.3 hour)
- Effective Selling: Understanding the Needs of a Law Firm (0.78 hour)
- History and Culture of Outsourcing to the Legal Industry (0.6 hour)
- INSPIRE Customer First - Sales (0.25 hour)
- INSPIRE High Performance - Sales (0.33 hour)
- Nuance eCopy PDF Pro Sales Training & Certification (0.5 hour)
COMPUTER SKILLS

- CCNA Routing and Switching: 01-Operation of IP Data Networks (1 hour)
- CCNA Routing and Switching: 02-LAN Switching and WAN Technologies (2 hours)
- CCNA Routing and Switching: 03-IPv4 and IPv6 (1 hour)
- CCNA Routing and Switching: 04-System and Network Management (1.25 hours)
- CCNA Routing and Switching: 05-IP Routing Technologies (1.5 hours)
- CCNA Routing and Switching: 06-IP Services and Security (1.75 hours)
- CCNA Routing and Switching: 07-Troubleshooting Routers and Switches (1.75 hours)
- CCNA Security: 01-Security and Cisco Routers (1.75 hours)
- CCNA Security: 02-AAA on Cisco Devices (0.75 hour)
- CCNA Security: 03-IOS ACLs (0.75 hour)
- CCNA Security: 04-Secure Network Management (0.75 hour)
- CCNA Security: 05-Common Layer 2 Attacks (1.5 hours)
- CCNA Security: 06-Cisco Firewall Technologies (1.5 hours)
- CCNA Security: 07-Cisco IPS (0.75 hour)
- CCNA Security: 08-VPN Technologies (1 hour)
- CCNA Wireless: 01-WLAN Fundamentals (1.25 hours)
- CCNA Wireless: 02-Installation of a Basic Cisco Wireless LAN (1.5 hours)
- CCNA Wireless: 03-Installation of Wireless Clients (0.75 hour)
- CCNA Wireless: 04-Basic WLAN Security (0.75 hour)
- CCNA Wireless: 05-Basic WCS Operation (0.75 hour)
- CCNA Wireless: 06-Basic WLAN Maintenance and Troubleshooting (0.75 hour)
- A+ 2016: Mobile Devices-Introduction to Mobile Devices (1.25 hours)
- A+ 2016: Mobile Devices-Mobile Operating Systems (1.5 hours)
- A+ 2016: Networking-Network Devices (1 hour)
- A+ 2016: Operating Systems-Installing and Patching Windows OS (2.25 hours)
- A+ 2016: Operating Systems-Overview of Mac OS and Linux OS (2 hours)
- A+ 2016: Operating Systems-Troubleshooting PC OS (2 hours)
- A+ 2016: Operating Systems-Windows Command-Line Tools (2.75 hours)
- A+ 2016: Operating Systems-Windows Operating Systems (2.25 hours)
- A+ 2016: PC Assembly-Assembly and Setup (1.25 hours)
- A+ 2016: PC Assembly-Computer Components and Organization (1.25 hours)
- A+ 2016: PC Assembly-Device Connections (1.25 hours)
- A+ 2016: PC Assembly-Troubleshooting Motherboard, CPU, and RAM (1.25 hours)
• A+ 2016: PC Assembly-Troubleshooting Storage and RAID (1.25 hours)
• A+ 2016: PC Components-Central Processing Unit (1.5 hours)
• A+ 2016: PC Components-Display Devices (1.25 hours)
• A+ 2016: PC Components-Introduction to Printers (2.5 hours)
• A+ 2016: PC Components-RAM Types and Features (1.25 hours)
• A+ 2016: PC Components-Storage Devices (1.5 hours)
• A+ 2016: Test Me-CompTIA Exam A+ 220-901 & 220-902 (1.5 hours)
• Network+ N10-006: 01-TCP/IP Fundamentals (2 hours)
• Network+ N10-006: 02-Network Infrastructure Services (1.5 hours)
• Network+ N10-006: 03-Understanding Network Devices (2 hours)
• Network+ N10-006: 04-Cables, Connectors, and Standards (1.5 hours)
• Network+ N10-006: 05-Understanding WAN Connections and Remote Access (1.75 hours)
• Network+ N10-006: 08-Network Security (2.75 hours)
• Network+ N10-006: 09-Networking Concepts and Theory (2 hours)
• Network+ N10-006: 10-Troubleshooting Networks (2 hours)
• Network+ N10-006: 11-LAN Infrastructures (2 hours)
• Network+ N10-006: 12-Advanced Networking Concepts (2 hours)
• Network+ N10-006: Test Me-CompTIA Exam Network+ (1.5 hours)
• ITIL® Foundation: 01-Introduction (1 hour)
• ITIL® Foundation: 02-Service Strategy (1 hour)
• ITIL® Foundation: 03-Service Design (1.5 hours)
• ITIL® Foundation: 04-Service Transition (1.25 hours)
• ITIL® Foundation: 05-Service Operation (1.25 hours)
• ITIL® Foundation: 06-Continual Service Improvement (1 hour)
• ITIL® Foundation: Test Me-ITIL® Foundation (1 hour)
• Security+ (SY0-401): Authentication Systems (1 hour)
• Security+ (SY0-401): Introduction to Ethical Hacking (1.5 hours)
• Security+ (SY0-401): Sniffers (1.5 hours)
• Security+ (SY0-401): Social Engineering (1 hour)
CONTINUOUS IMPROVEMENT

- Effective Delegation (3 hours)
- Effective Delegation: 01-What to Delegate (0.25 hour)
- Effective Delegation: 02-Issues in Delegating (0.25 hour)
- Effective Delegation: 03-Your Path to Delegating (0.25 hour)
- What is delegation? (Session) (OJMH328) (0.33 hour)
- Advanced Management Skills (5 hours)
- An Effective Leader's Guide to Time Management (0.5 hour)
- Analyse the organisation of your work and your priorities (Session) (OJEP612) (0.33 hour)
- Basics of Leadership: 01-Leadership Challenges (1 hour)
- Basics of Leadership: 02-Changes in Corporate Culture (1 hour)
- Basics of Leadership: 03-Keeping Employees Energized (1 hour)
- Basics of Leadership: 04-Knowledge Management (1 hour)
- Basics of Leadership: 05-Elements of Change in Business (1 hour)
- Basics of Leadership: 06-Leadership Dynamics (1 hour)
- Building Leadership Capability (0.5 hour)
- Coaching Job Skills: 01-Determining Training Or Coaching (0.25 hour)
- Coaching Job Skills: 03-Your Path to Coaching Existing Skills (0.25 hour)
- Collaborative Coaching (0.75 hour)
- Compensation Workbench Training for Managers - Merit 2017 (0.33 hour)
- Compensation Workbench Training for Managers - STI FY16 (0.33 hour)
- CONNECT With the Future (0.25 hour)
- CONNECT with the Right Resources - Enterprise (0.25 hour)
- Corrective Action (0.47 hour)
- Crucial Conversations - Module 3 (0.5 hour)
- Developing an Effective Individual Development Plan Online Course (0.5 hour)
- Developing Employees (0.25 hour)
- Developing Performance Goals & Standards: 01-The Value of Planning (0.25 hour)
- Developing Performance Goals & Standards: 02-Creating Performance Standards (0.25 hour)
- Developing Performance Goals & Standards: 03-Your Path to Developing Performance Goals and Standards (0.25 hour)
- Developing Your Leadership Style (1 hour)
- Effective Discipline: 01-Taking Disciplinary Action (0.25 hour)
- Emerging Leader Program - Moving into Management 2017 (1.25 hours)
- Emerging Leader Program - Moving into Management 2017 (Interactive learning resource) (MGT_ELMIM17) (0.75 hour)
- Emerging Leader Program Cultural Alignment Leading the RICOH Way (0.58 hour)
- Emerging Leader Recognizing and Rewarding Performance
and Behaviors (0.25 hour)
- Essential Skills of Communicating: 01-Empowering Leadership Communication (0.25 hour)
- Essential Skills of Leadership: 01-The Work of Leaders (0.25 hour)
- Essential Skills of Leadership: 02-Focus on Behavior (0.25 hour)
- Essential Skills of Leadership: 03-Maintain or Enhance Team Member Self-Esteem (0.25 hour)
- Essential Skills of Leadership: 04-Encourage Team Member Participation (0.25 hour)
- Essential Skills of Leadership: 05-Lead Effective Meetings (0.25 hour)
- Essential Skills of Leadership: 07-Essential Skills of Leadership Health Check (0.25 hour)
- Foundations for New Managers: Inspire Vision – Setting Performance Expectations (0.5 hour)
- Foundations for New Managers: Moving into Management (1 hour)
- How to effectively praise your staff (Essential) (EJMH038) (0.25 hour)
- How to effectively praise your staff (Session) (OJMH038) (0.5 hour)
- How to use the SMART method to formulate pertinent objectives that motivate your staff (Essential) (EJMH389) (0.25 hour)
- How to use the SMART method to formulate pertinent objectives that motivate your staff (Session) (OJMH689) (0.5 hour)
- INSPIRE High Performance (0.33 hour)
- Introduction to Fact Based Management Self Paced Training (1.5 hours)
- Management 101: 01-Introduction to Management (1 hour)
- Management 101: 02-Leading and Communicating as a Manager (1 hour)
- Management 101: 03-Making an Impact as a Manager (1 hour)
- Management 101: 04-Taking Control as a Manager (1 hour)
- Managing a team in the digital age (Essential) (EJMH757) (0.25 hour)
- Managing a team in the digital age (Session) (OJMH757) (0.33 hour)
- Managing Performance - Corrective Action (0.47 hour)
- Measuring processes for improvement (Essential) (EJCP631) (0.25 hour)
- Measuring processes for improvement (Session) (OJCP631) (0.33 hour)
- Oracle Field Service Cloud Mobility Module 5 Parts Management (2 hours)
- Oracle Field Service Cloud Mobility Module 5 Parts Management Part 2 Physical Inventory (0.25 hour)
- Providing Performance Feedback: 01-The Power of Performance Feedback (0.25 hour)
- Providing Performance Feedback: 02-Providing Verbal Performance Feedback (0.25 hour)
- Providing Performance Feedback: 04-Your Path to Providing Performance Feedback (0.25 hours)
- Recognition (0.28 hour)
- Ricoh Policies for Managers (0.42 hour)
- Ricoh’s Performance Management Process Online Training (0.5 hour)
- Section 1: The Importance of Information Management (0.25 hour)
- Section 2: Records and Information Management Fundamentals (0.25 hour)
- Selecting and Assessing Talent - The Recruiting Process (August 2016) (0.58 hour)
- Taking up the challenge of change (Session) (OJMH710) (0.5 hour)
- The principles of Management 3.0 (Session) (OJMH760) (0.33 hour)
- Tools for planning your work (Essential) (EJEP314) (0.25 hour)
- Tools for planning your work (Session) (OJEP614) (0.33 hour)
- Transform a Winning Team - Enterprise (0.3 hour)
- TRANSFORM Yourself - Enterprise (0.27 hour)
- Transition to Leadership (0.6 hour)
- What is vision? (Essential) (EJMH120) (0.25 hour)
- What is vision? (Session) (OJMH420) (0.33 hour)
- Art of Organization (0.77 hour)
- Attitude for Success (0.5 hour)
- Critical Thinking and Problem Solving (0.6 hour)
- Improving Work Habits: 01-Performance Issue or Poor Work Habit? (0.25 hour)
- Improving Work Habits: 02-Describing the Work Habit (0.25 hour)
- Improving Work Habits: 03-Keep Ownership with the Team Member (0.25 hour)
- Improving Work Habits: 05-Your Path to Improving Work Habits (0.25 hour)
- Lead with Strengths (0.5 hour)
- Manage Time (0.52 hour)
- Managing Disagreement (0.65 hour)
- Supporting Change: 01-The 3 Phases of Change (0.25 hour)
- Supporting Change: 02-Reactions to Change (0.25 hour)
- Supporting Change: 03-Your Path to Supporting Change (0.25 hour)
- The Power of One-Taking Accountability to Get Results (0.5 hour)
- Working as a Team (1 hour)
Note: Reimbursement for retraining is capped at 200 total training hours, per trainee, regardless of the method of delivery.
Training Proposal for:

South Bay Workforce Investment Board, Inc.

Agreement Number: ET19-0166

Panel Meeting of: July 27, 2018

ETP Regional Office: North Hollywood

Analyst: M. Reeves

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes</th>
<th>Industry Sector(s)</th>
<th>Manufacturing Aerospace and Defense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retraine SB &lt;100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Hire</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority Rate</td>
<td>Priority Industry: Yes ☒ No ☐</td>
<td></td>
</tr>
</tbody>
</table>

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

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

Turnover Rate: ≤20%

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>
</thead>
<tbody>
<tr>
<td>$122,824</td>
<td>$8,712</td>
<td>$131,536</td>
</tr>
<tr>
<td></td>
<td>(8% Jobs 1 &amp; 2)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(12% Job 3)</td>
<td></td>
</tr>
</tbody>
</table>

In-Kind Contribution: 50% of Total ETP Funding Required $74,868
# 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., HazMat, Literacy Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills</td>
<td>65</td>
<td>8-200 0-60</td>
<td>$1,668</td>
<td>$16.70</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraine SB &lt;100 Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Imp., HazMat, Literacy Skills, Mfg. Skills, OSHA 10/30, PL-Mfg. Skills</td>
<td>28</td>
<td>8-200 0-60</td>
<td>$500</td>
<td>$16.70</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>WeightedAvg: 18</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 80</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:**  
Job Numbers 1 & 2: $18.22 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara counties; $17.54 per hour for Los Angeles County; $17.50 per hour for Orange County; $17.03 per hour for San Diego County; $16.80 per hour for Sacramento County; and $16.70 per hour for all other counties.

Job Number 3 (New Hire): $15.18 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara counties; $14.62 per hour for Los Angeles County; $14.58 per hour for Orange County; $14.19 per hour for San Diego County; $14.00 per hour for Sacramento County; and $13.66 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 up to $2.50 per hour 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 &amp; 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operations/Support Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturing/Production Staff</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>Logistics/Warehouse/Distribution Staff</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Engineering/Information Technology Staff</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>Quality Assurance Staff</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Sales/Marketing Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Supervisor/Manager</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 3</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operations/Support Staff</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Manufacturing/Production Staff</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Logistics/Warehouse/Distribution Staff</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

### INTRODUCTION

The South Bay Workforce Investment Board, Inc. (SBWIB) ([www.sbwib.org](http://www.sbwib.org)) has been providing employment and training services under the oversight of the U. S. Department of Labor and the California Employment Development Department for more than 36 years. SBWIB provides comprehensive employment and training services under the federal Workforce Innovation and Opportunity Act (WIOA). SBWIB’s goal is to provide a fully integrated workforce system that maximizes employment and economic opportunity in partnership with business.

SBWIB serves more than 15,000 job seekers annually in the WIOA population of dislocated workers and youth. SBWIB also works collaboratively with economic development partners to serve the needs of employers to both attract and retain business in California.

Employer services include:
- Small business development
- Recruitment, hiring support, and job fairs
- Customized training
- Tax credit assistance

Job seeker services include:
- Labor market information
- Skills and interest assessments
- Career counseling
- Job referral and placement
- Occupational skills training

### PROJECT DETAILS

Training will focus primarily in Los Angeles County. However, some of the participating employers may have additional locations in other parts of California; therefore, this project may serve companies statewide.
SBWIB’s Manufacturing, Transportation, and Logistics Sector Partnership supports efforts to create a workforce pipeline of skilled employees to meet labor demand. The collaboration with employer partners in priority industry sectors helps identify ways to address employee skill gaps, mitigate loss of expertise due to retirement, and improve awareness of evolving employer needs.

In particular, the Aerospace & Defense industry functions as an incubator for innovation in advanced manufacturing, composites manufacturing, autonomous and manned vehicles, robotic assembly, and 3D printing. Industry analysts indicate this sector is poised to grow as defense projects increase and a new generation of private entrepreneurial space companies continue to generate thousands of jobs. Prime contractors, such as Northrop Grumman Corporation and others, are looking to their supply chain (suppliers/subcontractors) to increase their production capacity and product quality, while ensuring their ability to meet increasingly strict standards.

The Aerospace & Defense supply chain is a key component of this project as a pilot for serving the supplier base. The proposed training will allow participating employers to equip frontline workers with the knowledge and skills necessary to maximize productivity and operational efficiency.

Training Plan

The following will be delivered via Class/Lab, Productive Lab (PL) and Computer-Based Training (CBT):

**Business Skills:** Training will be provided to all occupations. Training will focus on customer service, business fundamentals, cost control, communication, sales/marketing and supply chain management.

**Computer Skills:** Training will be provided to all occupations. Training will help workers become more proficient with software solutions in the areas of 3D technology, computer-aided design, Cybersecurity, digital media and database management.

**Continuous Improvement:** Training will be provided to all occupations. This training will focus on process improvement and problem solving methodologies that enhance productivity through lean manufacturing principles, project management, strategic planning, teamwork and statistical process control concepts.

**Hazardous Materials:** Training will be provided to Supervisors/Managers, Manufacturing/Production and Logistics/Warehouse/Distribution Staff. This training will provide clean room and hazardous materials skills to frontline workers and lead personnel. Trainees will learn proper handling of hazardous materials, chemicals, and waste associated with manufacturing processes.

**Literacy Skills:** Training will be provided to Manufacturing/Production and Logistics/Warehouse/Distribution Staff. Vocational English as a Second Language training will help workers improve their job-related reading, writing and comprehension. This training will improve trainees’ communication skills and help them perform their jobs with greater confidence and proficiency.

**Manufacturing Skills:** Training will be provided to Manufacturing/Production, Logistics/Warehouse/Distribution and Quality Assurance Staff. Training will cover various aspects of assembly, machining, engineering, metalworking, equipment operation, maintenance and testing.
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.

Productive Laboratory

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

For many of the participating employers, PL training allows for practical, hands-on instruction in productive environment that cannot be adequately duplicated in a classroom setting. Therefore, Approximately 60 hours of PL-Manufacturing Skills training will be provided to roughly 50 trainees among the Manufacturing/Production, Logistics/Warehouse/Distribution and Quality Assurance Staff occupations. This training will help workers achieve the technical competencies needed to perform their jobs with the highest level of safety and efficiency.

PL training will focus on production skills, equipment operation, and maintenance. PL training will include the use of manufacturing machinery, welding equipment, diagnostic analysis/testing tools, automated assembly equipment, fluid fill equipment, and material handling equipment. Training will be taught by qualified instructors with industry knowledge and expertise in manufacturing processes. The trainer-to-trainee ratio will not exceed 1:1.

Curriculum Development

SBWIB collaborated with Aerospace & Defense industry employers through its Aero-Flex Consortium to identify training topics that are most in demand across the industry. SBWIB also shared the Curriculum with Northrop Grumman, as it relates to its supply chain needs. Additional input was provided by representatives from the Small Manufacturers Association, the Small Manufacturers Institute, and various equipment manufacturing firms.

Marketing and Support Costs

SBWIB’s marketing and recruitment efforts include networking with training and development professionals, newsletters, online marketing campaigns, trade shows, and direct telephone contact. SBWIB maintains relationships with employers, industry groups, consortiums, and employment councils throughout the greater Los Angeles area.

SBWIB is requesting 8% support costs for program marketing and training-related activities including the recruitment of participating employers and assessment of employer-specific job requirements for retrainees. New Hire support activities include the recruitment of participants, intake assessments, job readiness development, and job search/placement assistance. Staff recommends 8% Support Costs for Job Numbers 1 and 2, and 12% Support Costs for Job Number 3 (New Hire).
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 of participating employers. Most companies provide job orientation, government mandated courses and basic skills training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➢ Training Infrastructure

SBWIB’s Regional Affairs Manager will oversee project administration. Additional program marketing staff will assist with recruitment, scheduling, tracking, and documentation. SBWIB has also retained an administrative consultant to ensure that all training adheres to ETP requirements. SBWIB anticipates that approximately 90% of the proposed training will take place at employer worksites, with the remainder being center-based. Training will be delivered by in-house (employer and center-based) subject matter experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by SBWIB 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>*ET16-0125</td>
<td>Hawthorne</td>
<td>08/03/15 – 08/02/17</td>
<td>$199,050</td>
<td>$72,089</td>
<td>36%</td>
</tr>
</tbody>
</table>

*Poor performance was due to SBWIB’s termination of training vendor during term of contract and its difficulty replacing the vendor. Training was specialized making it more difficult to replace the vendor.

For this proposal, SBWIB is collaborating with a larger pool of resources for training delivery. Also, the training plan is less ambitious, with an average of no more than 80 training hours per person compared to 104 in the prior project.

Due to the diversified training plan and strong demand for training related to its Manufacturing, Transportation, and Logistics Sector Partnership, SBWIB is requesting funding above the amount earned on the prior project. With a revamped training plan focused on the Aerospace & Defense supply chain (Priority Industry), SBWIB is confident that it will be able to achieve the training objectives outlined in this proposal.

DEVELOPMENT SERVICES

Training Funding Partners (TFP) in Fountain Valley assisted with development for a flat fee of $5,500.
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 (Job Numbers 1 & 2)
8 – 260 (Job Number 3)

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Aerospace Overview
- Blockchain Fundamentals
- Business Analysis/Assessment
- Business Fundamentals
- Business Intelligence
- Business Writing
- Conflict Resolution/Management
- Cost Control
- Customer Service Skills
- Effective Communication Skills
- Effective Meeting Skills
- Estimating/Quoting
- Exporting
- Finance/Accounting Skills
- Financial Analysis/Management
- Good Documentation Practices
- Inventory Control/Inventory Management
- Marketing/Sales Skills
- Negotiation Skills
- Order Fulfillment Logistics
- Presentation Skills
- Supply Chain Management
- Time Management Skills

**COMPUTER SKILLS**
- 3D Inspection for CNC parts
- 3D Advanced Inspection with Analysis
- 3D Reverse Engineering
- 3D Tooling & Fabrication
- Adobe Acrobat
- Computer-Aided Design
- Computer-Aided Engineering
- Computer-Aided Manufacturing
- Computer Skills for Production and Inventory
- Computerized Maintenance Management System
- Cybersecurity
- Database Management Skills
- Digital Media
- Enterprise/Resource/Manufacturing Planning Systems
- Intermediate/Advanced Microsoft Word, Excel, PowerPoint Skills
- Microsoft Project
- Payroll/Accounting Systems
- SharePoint
- Shop Floor Computer Skills

**CONTINUOUS IMPROVEMENT**
- 5S/Lean Manufacturing/Six Sigma
- Business Performance/Goal Setting
- Business Process Improvement/Innovation/Reengineering
- Coaching/Feedback Skills
- Decision Making
- Demand Flow Technology
- DISC Assessment Learning
- Effective Leadership Skills/Situational Leadership
- Interpreting & Analyzing Data
- Managing Change
- Organizational Performance Process Review
- Problem Solving
- Process Mapping/Deployment
- Product Design/Development Skills
- Project/Program/Performance Management
- Risk Management
- Root Cause Analysis
- Simulation Modeling Skills
- Statistical Process Control Concepts, Theory, Application
- Strategic Planning
- Team Work/Building Teams
- Total Productive Maintenance
- Total Quality Management Skills
- Toyota Lean-Kata
- Value Stream Mapping

**HAZARDOUS MATERIALS**
- Clean Room/Clean Lab Training
- Hazardous Chemicals and Cleaning
- Hazardous Materials
- Hazardous Waste and Cleaning

**LITERACY SKILLS**
- Vocational English as a Second Language
  - Basic English Language Skills
  - Writing/Reading/Language Comprehension

Literacy Skills training cannot exceed 45% of total training hours per trainee

**MANUFACTURING SKILLS**
- 3-D Printing Technology/Inspection
- Additive Manufacturing
- Advanced CNC Equipment Training and Programming
- Assembly/Production Processes/Procedures
- Blueprint Reading
- Cycle Time Management
- Electrical and Motor Drives/Electrical Power/Power Transmission
- Engineering Design/Design of Experiments
- Equipment Operations
- Failure Mode and Effects Analysis
- Fiber Optics
- Geometric Dimensioning and Tolerancing
- Good Manufacturing Practices
- HAAS Equipment Automation
- Industrial Combustion
- Industrial Hydraulics
- Inventory Management
- ISO Skills
- Laser Cutting
- Logistics and Shipping
- Machining Skills
- Maintenance/Preventative Maintenance Procedures
- Manufacturing and Assembly Practices
- Materials Processing/Material Resource Planning
- Mechanical and Fluid Systems
- Metal Stamping Press/Metalworking
- National Institute for Metalworking Skills Certification(s)
- Non-Destructive Testing
- Pneumatics
- Programmable Logic Control/Computer Numerical Control
- Prototyping
- Quality/Testing
- Shop Math
- Small Batch Manufacturing
- Smart Manufacturing
- Standard Work Skills
- Variable Frequency Drives
- Warehouse Operations/Distribution

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

**Productive Lab Hours**
0 – 60

**MANUFACTURING SKILLS** (Ratio 1:1)
- 3-D Printing Technology/Inspection
- Additive Manufacturing
- Advanced CNC Equipment Training and Programming
- Assembly/Production Processes/Procedures
- Blueprint Reading
- Cycle Time Management
- Electrical and Motor Drives/Electrical Power/Power Transmission
- Engineering Design/Design of Experiments
- Equipment Operations
• Failure Mode and Effects Analysis  
• Geometric Dimensioning and Tolerancing  
• Good Manufacturing Practices  
• HAAS Equipment Automation  
• Industrial Combustion  
• Industrial Hydraulics  
• Inventory Management  
• ISO Skills  
• Laser Cutting  
• Logistics and Shipping  
• Machining Skills  
• Maintenance/Preventative Maintenance Procedures  
• Manufacturing and Assembly Practices  
• Materials Processing/Material Resource Planning  
• Mechanical and Fluid Systems  
• Metal Stamping Press/Metalworking  
• Pneumatics  
• Programmable Logic Control/Computer Numerical Control  
• Prototyping  
• Quality/Testing  
• Shop Math  
• Small Batch Manufacturing  
• Smart Manufacturing  
• Standard Work Skills  
• Variable Frequency Drives  
• Warehouse Operations/Distribution

**CBT Hours**  
0 – 60

**MANUFACTURING SKILLS**  
• Blueprint Reading (1.5 hours)  
• Blueprint for Success I (20 hours)  
• Blueprint for Success II (20 hours)  
• Cell Design and Pull Systems 161 (1.5 hours)  
• Concepts of Calculus 31 (1.5 hours)  
• Electrical Print Reading 261 (1.5 hours)  
• Electrical Units 101 (1.5 hours)  
• Ergonomics 102 (for new hires only) (1.5 hours)  
• Geometry: Circles and Polygons 171 (1.5 hours)  
• Geometry: Lines and Angles 151 (1.5 hours)  
• Geometry: Triangles 161 (1.5 hours)  
• Intro to Fluid Systems 100 (1.5 hours)  
• Intro to OSHA 101 (new hires only) (1.5 hours)  
• Intro to PLCs 200 (1.5 hours)  
• Introduction to CAD and CAM for Machining 241 (1.5 hours)  
• Introduction to Circuits 201 (1.5 hours)  
• Introduction to Magnetism 211 (1.5 hours)  
• Introduction to Mechanical Properties 111 (1.5 hours)  
• Introduction to Physical Properties 101 (1.5 hours)
- Lean Manufacturing Overview 101 (1.5 hours)
- Logic and Line Diagrams 312 (1.5 hours)
- Manufacturing Process Applications: Part I 124 (1.5 hours)
- Manufacturing Process Applications: Part II 125 (1.5 hours)
- Metrics for Lean 231 (1.5 hours)
- Personal Protective Equipment 111 (new hires only) (1.5 hours)
- Relays, Contactors, and Motor Starters 201 (1.5 hours)
- SPC Overview 211 (1.5 hours)
- Symbols and Diagrams for Motors 311 (1.5 hours)
- The Forces of Fluid Power 110 (1.5 hours)
- Total Quality Management Overview 261 (1.5 hours)
- Trigonometry: Sine Bar Applications 221 (1.5 hours)
- Trigonometry: Sine, Cosine, Tangent 211 (1.5 hours)
- Trigonometry: The Pythagorean Theorem 201 (1.5 hours)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee and new hire training is capped at 260 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>Bachem Americas, Inc.</td>
<td>3132 Kashiwa Street</td>
<td>Torrance, CA 90505</td>
<td>N/A</td>
<td>50</td>
<td>1,000</td>
<td>300</td>
</tr>
<tr>
<td>CalAmp</td>
<td>15635 Alton Parkway, Suite 250</td>
<td>Irvine, CA 92518</td>
<td>N/A</td>
<td>60</td>
<td>900</td>
<td>288</td>
</tr>
<tr>
<td>Impresa Aerospace</td>
<td>344 W. 157th St.</td>
<td>Gardena, CA 90248</td>
<td>N/A</td>
<td>20</td>
<td>220</td>
<td>220</td>
</tr>
<tr>
<td>Morf3D</td>
<td>821 N. Nash St.</td>
<td>El Segundo, CA 90245</td>
<td>N/A</td>
<td>10</td>
<td>12</td>
<td>12</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</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>Pro-Tech Knives, LLC</td>
<td>17115 Alburtis Ave.</td>
<td>Artesia, CA 90701</td>
<td>N/A</td>
<td>10</td>
<td>18</td>
<td>18</td>
</tr>
<tr>
<td>S&amp;H Machine</td>
<td>900 N. Lake Street</td>
<td>Burbank, CA 91502</td>
<td>N/A</td>
<td>40</td>
<td>87</td>
<td>79</td>
</tr>
<tr>
<td>Senior Aerospace Ketema</td>
<td>790 Greenfield Dr.</td>
<td>El Cajon, California, 92021</td>
<td>N/A</td>
<td>200</td>
<td>4,500</td>
<td>1,100</td>
</tr>
<tr>
<td>Steico Industries, Inc.</td>
<td>1814 Ord Way</td>
<td>Oceanside, CA 92056</td>
<td>N/A</td>
<td>20</td>
<td>230</td>
<td>230</td>
</tr>
</tbody>
</table>
Training Proposal for:
Sun Hill Properties, Inc.

Agreement Number: ET19-0176

Panel Meeting of: July 27, 2018

ETP Regional Office: North Hollywood  Analyst: M. Niquet

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></td>
<td>Priority Industry: [ ] Yes [ ] No</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Los Angeles</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>Turnover Rate:</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors: (% of total trainees)</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

Program Costs - (Substantial Contribution) - (High Earner Reduction) = Total ETP Funding

<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>$188,600</td>
<td>$0</td>
<td>$0</td>
<td>$188,600</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>Retrainees</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Management Skills, Literacy Skills</td>
<td>410</td>
<td>8-200</td>
<td>0</td>
<td>460</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $17.54 per hour for Los Angeles County

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

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

Up to $1.88 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>Food/Beverage</td>
<td>199</td>
<td></td>
</tr>
<tr>
<td>Housekeeping</td>
<td>108</td>
<td></td>
</tr>
<tr>
<td>Building Engineers</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>Front Desk</td>
<td>36</td>
<td></td>
</tr>
<tr>
<td>Accounting</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Sales/Marketing</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Human Resources</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors</td>
<td>41</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1990 and headquartered in Universal City, Sun Hill Properties, Inc. (Sun Hill) (www.hiltonlosangeles/universalcity.com) owns and manages the franchise Hilton Los Angeles/Universal City. Sun Hill will hold this ETP contract to train employees of the Hilton Los Angeles/Universal City. The Hilton Los Angeles/Universal City originally opened in 1984 as the Sheraton Premier Hotel, the hotel was reflagged in 1990 as a Hilton when Sun Hill Properties Inc. purchased the building. The Hilton Los Angeles/Universal City is the largest Destination Resort Hotel in the San Fernando Valley. It has 495 rooms in a 24-story building.

**PROJECT DETAILS**

The Hilton Los Angeles/Universal City competes with other destination resort hotels across the country drawing visitors from around the county and internationally. In order to maintain market
share and continue to compete with other high-end hotels that are expanding their properties, the Hilton Los Angeles/Universal City must compete continually by upgrading amenities and services. An extraordinarily high-level of guest satisfaction must be achieved in order to attract new business and increase revenues. The Hilton Los Angeles/Universal City recently completed a $17,000,000 renovation and upgrade to the hotel (completed in 2017). The restaurant, kitchen, lobby, and rooms were all upgraded as well as the pool and cabana areas.

Training will focus on communication and management skills for front-line and Managers/Supervisors. Training will improve staff interaction with guests and enable the Company to be more competitive. Also, Managers will become more proficient at managing their departments. Upgrades in hotel amenities are critical to stay competitive. The hotel must train staff to keep pace on necessary upgrades. To improve customer service, staff must work and communicate in a professional manner. Management and front-line workers must create an environment with seamless customer service. Departments must work effectively together. Front-line workers and management must learn to communicate effectively and be more productive.

The Company is ready to start training upon approval of this agreement. This will be Sun Hill’s first ETP Agreement

**Training Plan**

Training will take place at the Hilton Los Angeles/Universal City.

**Business Skills** - Training will be offered to all occupations. Topics will include Business Processes, Guest Service Skills and Operating Procedures. Training will result in employees functioning at a higher level from simple day-to-day job skills to serving guests with confidence and expertise. This will also result in a more efficient response to problems and fewer difficulties.

**Computer Skills** - Training will be offered to Front Desk staff, Accounting Staff Sales/Marketing Human Resources, and Managers/Supervisors. Topics will include Procurement, Reporting and Advanced MS Office. This training is key to employees doing their jobs well and in a timely manner as new technology is key to functioning effectively and efficiently.

**Continuous Improvement** - Training will be offered to all occupations. Topics will include Critical Thinking, Measuring for Success, and Problem Solving and Resolution. In order for employees to grow in their careers, they need to participate in a larger culture of continued refinement serving guests. Continuous Improvement training will be an environment where employees work as a team to consistently solve problems and help guests feel at home in a way that enhances the guest's experience.

**Literacy Skills** - VESL classes will be offered to select employees in order to improve English communication, which will allow them to serve guests more effectively.

**Management Skills** - Training will be offered to Managers/Supervisors. Topics will include Accountability, Coaching and Mentoring and Relationship Building. These skills will help managers work more effectively with their teams. This will result in employees being supported in the work they do in a way that is in alignment with the goals of creating a guest experience second to none.
Commitment to Training

Sun Hill spends an estimated $ 83,000 annually in training at their California facility. 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

Sun Hill has designated a full-time Training Manager to oversee training delivery, scheduling, and tracking training. The Vice President of Human Resources will also oversee this project. The Company has also retained an administrative subcontractor to ensure that training administration and documentation adhere to ETP requirements. Training will be provided by both in-house subject matter experts and vendors to be identified during the contract term.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Sun Hill retained National Training Company in Middletown to assist with development of this proposal for a flat fee of $7,500

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined
 Exhibit B: Menu Curriculum

Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Business Processes
- Dealing With Difficult People
- Guest Service Skills
- Hospitality & Communication Skills
- Identifying/Meeting Guest Needs
- Communication & Interpersonal Skills
- Negotiating Skills
- Operating Procedures
- Putting the Guest First
- Resolving Guest Complaints
- Service Values

**COMPUTER SKILLS**
- Computer Application Skills
- Accounting Skills
- Procurement Software
- Customer Information Systems
- Internal Customer Applications
- MS Office (Intermediate and Advanced)
- Point of Sale Applications
- Reservation Systems
- Reports & Scheduling Software
- Smartphone Technology and Application Skills
- Tablet Technology and Application Skills

**CONTINUOUS IMPROVEMENT**
- Critical Thinking Skills
- Measuring for Success
- Problem Solving and Resolution
- Standard Work Procedures
- Team Building Skills

**LITERACY SKILLS**
- VESL

**MANAGEMENT SKILLS (Managers/Supervisors Only)**
- Supervisory Skills
- Accountability & Taking Responsibility
- Change Management
- Coaching & Mentoring
- Communication
- Conflict Resolution
- Empowerment
- Motivation & Attitude Improvement
- Professionalism
- Relationship Building
- Teamwork

* Literacy Skills is capped at 45% of the 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:
Sunvair, Inc.

Small Business
ET19-0164

Panel Meeting of: July 27, 2018
ETP Regional Office: North Hollywood       Analyst: M. Webb

CONTRACTOR

- Type of Industry: Manufacturing
- Priority Industry: Yes No
- Number of Full-Time Employees
  - California: 86
  - Worldwide: 123
  - Number to be trained: 95
- Owner Yes No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 17%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: $98,800
- In-Kind Contribution: $98,306
## 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>Retraine SB &lt;100 Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Improv., Mfg. Skills, Mgmt. Skills, PL-Mfg. Skills</td>
<td>80</td>
<td>8-200 0</td>
<td>$1,040</td>
<td>$17.54</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</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):** Los Angeles
- **Occupations to be Trained:** Administration Staff, Customer Service Staff, Manager, Production Staff, Quality/Inspection Staff
- **Union Representation:** ☐ Yes   ☑ No
- **Health Benefits:** Job #’s 1 & 2: $2.50 per hour

### SUBCONTRACTORS

- **Development Services:** California Manufacturing Technology Consulting (CMTC) in Torrance assisted with development of this proposal for a flat fee of $9,800.
- **Administrative Services:** CMTC will perform administrative services for a fee not to exceed 13% of payment earned.
- **Training Vendors:** N/A
OVERVIEW

Founded in 1955 and located in Valencia, 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. Sunvair’s core business is the overhauling and repair of aircraft landing gear for Boeing, Airbus and Lockheed Martin. Additional clientele includes Alaska Airlines, Hawaiian Airlines, Allegiant Airlines and Southwest Airlines. This will be Sunvair’s second ETP Agreement, its second in the last five years.

Sunvair must train workers in Manufacturing and Continuous Improvement Skills, expanding Lean efforts across the Company facility. Leadership and management skills training will help to transition frontline staff into management positions.

Production staff will receive training enabling them to work in the new metal finishing/plate shop.

Production Staff will be trained on repair and overhaul of landing gear. Repairs performed on various landing gear models and components are unique and differ by model. Sunvair must submit engineering evaluations to the customer.

Training Plan

An in-depth assessment has been conducted to develop a training plan to execute Sunvair’s strategic vision, and improve employee technical skills. As a growing company, Sunvair will provide a significant amount of training to newly hired workers. Training will be delivered by in-house instructors and outside vendors to be determined later. Training will take place at the company’s Valencia location.

Business Skills: Training will be offered to Customer Service and Administration Staff to work effectively, improve communication skills, and to better assess and meet customer expectations.

Computer Skills: Training will be offered to all occupations to ensure staff is able to utilize computer software programs used by Sunvair. Course topics will include content on the company’s ERP System, Quantum, and MS Office.

Manufacturing Skills: Training will be offered to Production Staff and Managers to ensure staff can operate new equipment, increasing productivity. Trainees will learn to use power tools, and large and small blasting equipment.

Management Skills: Training will be offered to Managers to improve leadership and strategic planning skills.

Continuous Improvement: Training will be offered to Production Staff and Managers to improve production times and learn to operate new equipment. Training will include improving trainee skills in painting, assembly, disassembly, shipping, machinery, and metal finishing.

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, and special attendance rosters will be used to assist in monitoring.
Sunvair’s facility has expanded and now includes plating operation. Prior to this expansion, the Company outsourced its plating services; however, this service is now completed in-house with a new state of the art chrome nickel, and cadmium metal finishing facility. Employees will require substantial training in the operation of new equipment, as well as the proper chemical compositions, needed to properly plate Sunvair products in accordance with customer specifications, and learn company procedures.

A total of approximately 20 Production workers will receive between 16-40 hours of PL training to learn inspection techniques, customer manual interpretations, assembly/disassembly, testing, machining, and painting. Each standard work process will be taught as a stand-alone, hands-on process training with instruction from an in-house expert that is knowledgable on new equipment. Sunvair is requesting a trainer-to-trainee ratio of up to 1:3 due to company expansion during contract time frames. This ratio will add to the efficiency and not detract from the quality and accuracy of training being provided.

**Retrainee - Job Creation**

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

Sunvair 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. Sunvair will hire these employees to cover additional production shifts due to the addition of the metal finishing/plate shop.

**Temporary to Permanent Hiring**

Sunvair intends to train 3 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 Sunvair, 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. Moreover, they cannot be enrolled as trainees until after they have been hired by Sunvair into full-time, permanent employment. Until they are so hired, retention and post-retention wage requirements cannot be satisfied and the Company will not receive progress payments.

➢ **Training Infrastructure**

Sunvair’s Chief Financial Officer will oversee administration of training delivered under this proposal. Staff will take on the responsibility to schedule training and collect ETP rosters throughout the duration of this Agreement. Sunvair has also hired California Manufacturing Technology Consulting (CMTC) to provide training and administrative services. CMTC will assist with data entry, invoice submission (payment), and compliance with ETP rules and regulations.
RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by Sunvair 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>ET17-0329</td>
<td>$75,920</td>
<td>12/10/16-12/09/18</td>
<td>69</td>
<td>52</td>
<td>TBD</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 2,680 reimbursable hours have been tracked for potential earnings of $69,680 (91% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to and in progress through July 2018. All 52 trainees are on track to be retained pending completion of progress and final payments.
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

BUSINESS SKILLS
- Providing Quality Customer Service

COMPUTER SKILLS
- ERP System: Quantum Software
- MS Office

CONTINUOUS IMPROVEMENT
- ISO 9000 2015 Standards
- Leadership
- Lean Manufacturing
- Problem Solving
- Production and Inventory Management
- Quality Systems
- Supply Chain Optimization
- Teams and Team Building

MANAGEMENT SKILLS (Managers Only)
- Management/Supervisory Skills
- Strategic Planning and Policy Deployment

MANUFACTURING SKILLS
- Blueprint Reading
- Deburring
- Disassembly
- Geometric Dimensioning & Tolerancing
- Inspection
- Machining
- Metaling Finishing
- Non-Destructive Testing
- Painting
- Plating
- Shipping

Productive Lab
0-40

MANUFACTURING SKILLS (Ratio 1:3)
- Blueprint Reading
- Deburring
- Disassembly
- Geometric Dimensioning & Tolerancing
- Inspection
- Machining
- Metaling Finishing
- Non-Destructive Testing
- Painting
- Plating
- Shipping

Note: Reimbursement for retraining is capped at 200 total hours per-trainee in Job Numbers 1 and 2, regardless of method of delivery.
Panel Amendment #1 Proposal for:
SYSCO Riverside, Inc.
Agreement Number: ET17-0347

Amendment Effective Date: December 11, 2016

Panel Meeting of: July 27, 2018

ETP Regional Office: San Diego       Analyst: K. Hernandez

CURRENT PROJECT PROFILE

Contract Industry Type: SET Frontline - Retraineef Sector(s): Wholesale Trade Services

Counties Served: Riverside County
Union(s): ☐ Yes ☒ No
Repeat Contractor: ☒ Yes ☐ No
Priority Industry: ☐ Yes ☒ No
Current Contract Term: December 10, 2016 to December 9, 2018
Substantial Contribution: ☐ Yes 15% ☒ No

CURRENT FUNDING

| Current Funding | $80,850 |

AMENDMENT FUNDING

<table>
<thead>
<tr>
<th>Requested Funding</th>
<th>Total Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$66,150</td>
<td>$147,000</td>
</tr>
</tbody>
</table>
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>SET Retrainee</td>
<td>Business Skills, Continuous Impr, Computer Skills</td>
<td>70</td>
<td>8-200</td>
<td>0</td>
<td>$2,100</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

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 Title</th>
<th>Wage Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales/Marketing Associate</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).

15% Reduction

Per the Panel’s direction a 15% reduction for all SYSCO projects was applied across all occupations/Job Numbers at the August 24th, 2016 Panel Meeting. As such, the original requested amount of $94,500 was reduced accordingly to $80,850. This SYSCO Riverside proposal was approved on 12/09/16 via delegation order.

AMENDMENT DETAILS

The Company is requesting an amendment to increase the average weighted hours for Job Number 1 from 77 to 140 hours for the existing trainees. As stated above, Sysco Riverside’s funding was reduced by 15% but their training need remained the same. In addition, the Company was required to accelerate the delivery of training and increase the total amount of training hours above projections to meet increased customer demand. Since the start-of-term, Sysco Riverside experienced a significant increase in sales and an increase in the total amount of customers that required consulting related to the Company’s 10 new customer-facing technology solutions, requiring significant training.
RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by SYSCO Riverside under the current ETP Agreement(s):

<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>ET17-0347</td>
<td>$80,850</td>
<td>12/10/2016–12/09/2018</td>
<td>104</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 9,827 reimbursable hours have been tracked for potential earnings of 100% of approved amount. The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through the end of the contract term.
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.
# Training Proposal for:

The Ultimate Software Group, Inc.

**Agreement Number:** ET19-0175

**Panel Meeting of:** July 27, 2018

**ETP Regional Office:** San Diego  
**Analyst:** M. Ibarra

## PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainee</th>
<th>Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Services</th>
<th>Technology/Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Orange</th>
<th>Repeat Contractor:</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 431</th>
<th>U.S.: 3,760</th>
<th>Worldwide: 4,208</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>10%</th>
</tr>
</thead>
</table>

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

## FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
</tr>
</thead>
<tbody>
<tr>
<td>$199,290</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>

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

\[
\text{Total ETP Funding} = $199,290 - 0 - 0 = $199,290
\]

<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
<th>100% of Total ETP Funding Required</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$341,205</td>
</tr>
</tbody>
</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>Retraining Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improv</td>
<td>219</td>
<td>8-200</td>
<td>$910</td>
<td>$17.50</td>
</tr>
</tbody>
</table>

Minimum Wage by County: $18.22 per hour for Alameda and San Francisco Counties; and $17.50 per hour for Orange County

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

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

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

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>MidMarket Support Representative</td>
<td>42</td>
<td></td>
</tr>
<tr>
<td>MidMarket/Enterprise Implementation Representative</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>Payment Services/Tax Filing Representative/Tax Analyst</td>
<td>86</td>
<td></td>
</tr>
<tr>
<td>Enterprise Support Representative</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>Managed Services/Technical Support</td>
<td>58</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1990 and headquartered in Weston, Florida, The Ultimate Software Group, Inc. (Ultimate Software) (www.ultimatesoftware.com) is a software and technology company and a Human Resources (HR), payroll, and benefits provider. The Company provides Software-as-a-Service (SaaS) solutions for companies to manage their HR, payroll, benefits, and employee resources. The Company’s primary product, “UltiPro,” provides core HR and payroll management services that support and improve Human Capital Management (HCM) technology. Ultimate Software serves more than 4,100 business organizations around the world in a myriad of industries.

This will be Ultimate Software’s third ETP Agreement within the last five years. The first two ETP projects targeted workers at the Company’s Santa Ana facility only. This proposal will target workers at Santa Ana, Fremont, and San Francisco locations.

PROJECT DETAILS

In its previous projects, Ultimate Software provided customer service and conflict resolution training. This new proposal has some curriculum topics similar to those of the prior Agreement; however, the subject matter has been updated and/or improved. Training will not be duplicated.
Ultimate Software is projecting continuous growth through 2019 based on projected sales, customer retention, and an increasing customer base. To keep pace and support growth, Ultimate Software must continue to create innovative products and services to meet customer demands and remain competitive in the marketplace. Training will provide employees with the latest knowledge in current payroll taxes, general ledger, HR benefits, and business rules. The Company will also provide training in problem solving, teamwork development, collaboration skills, and critical thinking techniques.

Additionally, the Company is creating two new specialized departments, Gig Workforce and Liquid Workforce, dedicated to short-term projects. Training will allow employees to work in a continuously evolving environment.

Training Plan

Training will be delivered via Class/Lab and E-Learning (virtual classroom) in the following skills:

**Business Skills** – Training topics include Security Administration; Business Rule Configuration and Business Workflow Configuration; Business Execution: Linking strategy to people to enhance business outcome; Business Process Configuration; Delivering Customer Service - Productive Dialogue and Leadership Training; Maintaining Compliance of Federal, Local, and State Regulated Payroll Taxes; Providing Customer Advocacy by Creating an Emotional Connection; and Preparing Customers for Compliance of Patient Protection Affordable Care Act.

**Commercial Skills** – Training topics include Basic and Advanced training Structured Query Language (SQL); Global Use of UltiPro/Accessing Client Environments; Creating Business Intelligence Dashboards; Knowledge Check to Ultipro, SQL, and Tax Reconciliation; Payroll II: Troubleshooting and Testing; Recruiting System Errors; Wage Attachment Activation; Security Configuration; and Payroll Basics and Advanced Payroll.

**Computer Skills** – Training topics include Cognos Business Intelligence and Report generating; Microsoft Outlook 2013+; Excel (Intermediate or Advanced); Company Configuration Activation; Banking Configuration in UltiPro Back office; General Ledger Best Practices and Techniques; Open Enrollment and Benefits Business Rule; Tax Reconciliation and Location Business Rules; and Payment Services Operational Systems and Company Tax Verification Reporting.

**Continuous Improvement** – Training topics include Returning to Core Competencies; Leadership, Problem Solving, and Management Skills; Critical Thinking Best Practices and Techniques; and Continue our Culture of Servant Leadership.

**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. The Company spends an estimated $182,335 annually on training per facility in California. Company-funded training includes a full range of mandatory and elective topics in Security, Employee Relations, Business Skills, Computer Skills, Industry Certification/Recertification, Relationship Management, Payroll/Accounting/Tax Administration and Customer Support, product training, and continuous improvement.

- **Training Infrastructure**

  The Project Manager will oversee the project. The Company also designated a staff member and onsite in-house trainers, to manage and track enrollment and training activities in the LMS.
and in the ETP Online Systems for all three facilities participating in this project. Training will be delivered by in-house instructors and vendors as needed.

Electronic Recordkeeping

Ultimate Software currently uses a Learning Management System (LMS) to schedule training and track training attendance. The Company will utilize the LMS to document all training in this proposal. The system was reviewed and approved by ETP Staff.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performances by Ultimate Software 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>ET16-0245</td>
<td>Santa Ana</td>
<td>10/28/2015–10/27/2017</td>
<td>$43,434</td>
<td>$43,434 (100%)</td>
</tr>
<tr>
<td>ET13-0196</td>
<td>Santa Ana</td>
<td>12/31/2012–12/30/2014</td>
<td>$95,200</td>
<td>$43,963 (46%)</td>
</tr>
</tbody>
</table>

**ET13-0196:** During the term of this ETP Agreement, the Company reorganized and reassigned duties which impacted the overall implementation and management of training. Subsequent to the transition, the Company was able to reassign management of the ETP project to the Services Training Department at the latter part of the contract term. The department was able to successfully implement and manage ETP training subsequent to reassignment of duties. Although training was back on track, there was not sufficient time to maximize earnings. As such, Ultimate Software achieved lower than expected training performance.

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**
- Security Administration
- Business Rule Configuration and Business Workflow Configuration
- Business Execution: Linking Strategy to People to Enhance Business Outcome
- Business Process Configuration
- Delivering Customer Service - Productive Dialogue and Leadership Training
- Maintaining Compliance of Federal, Local and State Regulated Payroll Taxes
- Providing Customer Advocacy by Creating an Emotional Connection
- Preparing Customers for Compliance of Patient Protection Affordable Care Act

**COMMERCIAL SKILLS**
- Global Use of UltiPro/Accessing Client Environments
- Basic and Advanced Training Structured Query Language (SQL)
- Creating Business Intelligence Dashboards
- Knowledge Check to Ultipro, SQL, Tax Reconciliation
- Payroll II: Troubleshooting and Testing
- Recruiting System Errors
- Wage Attachment Activation
- Security Configuration
- Payroll Basics and Advanced Payroll

**COMPUTER SKILLS**
- Cognos Business Intelligence, Report Generating
- Microsoft Outlook 2013+
- Excel (Intermediate or Advanced)
- Company Configuration Activation
- Banking Configuration in Ultipro Back office
- General Ledger Best Practices and Techniques
- Open Enrollment and Benefits Business Rule
- Tax Reconciliation and Location Business Rules
- Payment Services Operational Systems and Company Tax Verification Reporting

**CONTINUOUS IMPROVEMENT**
- Returning to Core Competencies
- Leadership, Problem Solving, and Management Skills
- Critical Thinking Best Practices and Techniques
- Continue our Culture of Servant Leadership

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
Vision Care Center, A Medical Group, Inc.
dba Eye-Q Vision Care
Agreement Number: ET19-0157

Panel Meeting of: July 27, 2018
ETP Regional Office: Sacramento
Analyst: C. Kaiser

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Priority Rate</th>
<th>Job Creation Initiative</th>
<th>HUA</th>
<th>Retrainee</th>
<th>Medical Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Priority Rate</td>
<td>SET</td>
<td>HUA</td>
<td>Retrainee</td>
<td>Medical Skills</td>
</tr>
</tbody>
</table>

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

| Counties Served:                      | Fresno               |
| Repeat Contractor:                    | Yes                  |

| Union(s):                             | Yes                  |

| Number of Employees in:               | CA: 224              |
|                                       | U.S.: 224            |
|                                       | Worldwide: 224        |

| Turnover Rate:                        | 9%                   |

| Managers/Supervisors:                | N/A                  |

| Manag. (N/A)                         |                      |

<table>
<thead>
<tr>
<th>FUNDING DETAIL</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Costs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>$152,828</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>$0</td>
</tr>
</tbody>
</table>

| Total ETP Funding                    | $152,828               |

| In-Kind Contribution:                | 100% of Total ETP Funding Required |
|                                      | $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>1</td>
<td>Priority Rate HUA</td>
<td>Business Skills, Comm’l Skills, Computer Skills, Cont. Imp., Mgmnt. Skills, MS-Didactic</td>
<td>201</td>
<td>8-200</td>
<td>$728</td>
<td>$12.53*</td>
</tr>
<tr>
<td></td>
<td>SET Medical Skills</td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 28</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Job Creation Priority Rate HUA</td>
<td>Business Skills, Comm’l Skills, Computer Skills, Cont. Imp., Mgmnt. Skills, MS-Didactic</td>
<td>5</td>
<td>8-200</td>
<td>$1,300</td>
<td>$11.00*</td>
</tr>
<tr>
<td></td>
<td>SET Medical Skills</td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 50</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: $12.53 per hour for Fresno County
- Job Number 2 (Job Creation): $11.00 per hour for Fresno County

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

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

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 Number 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounting Staff</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Business Office Staff</td>
<td>16</td>
<td></td>
</tr>
<tr>
<td>Clinic Staff</td>
<td>77</td>
<td></td>
</tr>
<tr>
<td>Front Desk Staff</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Information Technology Staff</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Nursing Staff</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Optical Staff</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Scheduling Staff</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>Supervisors/Coordinators</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Surgery Center Support Staff</td>
<td>13</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1956 and headquartered in Fresno, Vision Care Center, A Medical Group, Inc. dba Eye-Q Vision Care (Eye-Q) (www.eyeqvc.com), is a leading comprehensive eye care provider. The Company services include general eye exams to complex eye surgeries including Lasik, cataract treatments, optical services, retina treatments, glaucoma testing and treatment, pediatric eye care and dry eye treatment. Eye-Q has three locations in the Central Valley and service all aspects of eye and vision care. Training will be conducted at the Fresno, Clovis and Selma locations. This is Eye-Q’s first ETP Agreement.

PROJECT DETAILS

Eye-Q offers the latest advancements in eye care to the residents of the Central Valley. Due to the increase in demand for its services, the Company is hiring additional staff and implementing new software including Medication Inventory Management System to increase efficiency.

The Company has created a training plan focused on its training needs. All staff will be trained on the Electronic Health Records System version update, updates in the eyecare field, and customer service. In addition, an emphasis will be placed on efficiencies and quality control standards for all staff. Additional training includes new or updated eye treatments and prevention, LEAN training, medical skills, management training to be more effective leaders, and maintenance of the building and eyecare equipment.

Retrainee - Job Creation

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

Do to the recent 4% growth in revenue and the steady increase of patients (approximately 1,400 new patients in the last 2 years), Eye-Q has committed to hiring 5 new employees: four Clinicians and one Front Desk Clerk (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. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Eye-Q will provide training via Class/Lab in the following:

**Business Skills**: Training will be offered to all occupations and focus on customer service and product knowledge. Topics include Communication Skills, Customer Service and Sales Skills.

**Commercial Skills**: Training will be offered to Maintenance Staff and focus on properly maintaining the building and optical equipment. Training topics include Proper Sanitation and Building Maintenance.

**Computer Skills**: Training will be offered to all occupations and focus on implementation and version updates of software. Training topics include Medical Inventory Software and NextGen Electronic Health Software.
Continuous Improvement: Training will be offered to all occupations and focus on quality control and efficiencies. Training topics include Team Building, LEAN Principles and Quality Control Systems.

Management Skills: Training will be offered to the Supervisors/Coordinators and focus on planning and effective leadership. Training topics include Medical Practice Management and Strategic Planning.

Medical Skills- Didactic: The Panel has established a “blended” reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model. Approximately 100 trainees including Nursing Staff will participate in clinical skills training, including didactic training.

Classroom/laboratory training will be provided in by advanced clinical processes to ensure competency and maximize patient satisfaction and safety. Training topics include Refraction Training, Glaucoma Testing, Patient Assessment and Care, and Dry Eye Treatment Protocols.

Retention Modifications

Eye-Q is requesting an alternate retention of 500 hours within 272 days for 20 Nursing Staff. Healthcare workers are considered to have non-customary work hours and may request an alternate retention to satisfy the retention requirements.

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.

Eye-Q is requesting to decrease the full-time employment hours from 35 hours per week to 30 hours per week, for 20 Nursing Staff. Employees in these occupations are considered full-time at 30 hours per week and eligible for full-time benefits.

Commitment to Training

Eye-Q’s annual training is approximately $50,000 and includes new software, updated processes, continuing employee development, and job specific training.

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

➢ Training Infrastructure

Training will be provided by qualified in-house trainers. The Accounting Coordinator, a Human Resources staff member, and a Manager will all oversee contract administration. Each location has 1 point of contact responsible for training schedules, administration, and to track trainings. Eye-Q has also retained a third-party administrator who has extensive ETP experience to assist with administration. Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.
DEVELOPMENT SERVICES

Strategic Business Solutions, LLC in Visalia assisted with development for a flat fee of $7,750.00.

ADMINISTRATIVE SERVICES

Business Solutions, LLC will also perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Communication Skills
- Customer Service
- Marketing Skills
- Product Knowledge
- Sales Skills

**COMMERCIAL SKILLS**
- Basic Life Support
- Building Maintenance
- Proper Sanitation

**COMPUTER SKILLS**
- Medical Inventory Software
- MS Office Suite (Intermediate and Advanced)
- NextGen Electronic Health Software

**CONTINUOUS IMPROVEMENT**
- Effective Leadership
- LEAN Principles
- Process Analysis
- Quality Control Systems
- Strengths, Weakness, Opportunities, Threats Training
- Team Building

**MEDICAL SKILLS - DIDACTIC**
- Advanced Cardiac Life Support
- Aerosol Transmittable Disease Training
- Ambulatory Care/Life Safety
- Anesthesia Protocols
- Basic Life Support
- Clinical Protocol
- Dry Eye Treatment Protocol
- Glaucoma Testing
- Infection Control
- Laser Safety Protocol
- Patient Assessment and Care
- Refraction of the Eye Training
- Skin Care Training

**MANAGEMENT SKILLS** (Managers/Supervisors Only)
- Strategic Planning
- Medical Practice Management
Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
White Nelson Diehl Evans, LLP

Agreement Number: ET19-0169

Panel Meeting of: July 27, 2018

ETP Regional Office: San Diego  Analyst: K. Hernandez

### PROJET PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraineer</th>
<th>Industry Sector(s):</th>
<th>Financial Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>Yes  No</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Orange and San Diego</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: 122  U.S.:122  Worldwide: 122</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>0%</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>$97,290</td>
<td>$0</td>
<td>$0</td>
<td>$97,290</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required  $176,800
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>Retrainee</td>
<td>Business Skills, Comm'l Skills, Computer Skills</td>
<td>94</td>
<td>8-200</td>
<td>$1,035</td>
<td>$17.03</td>
</tr>
</tbody>
</table>

Minimum Wage by County: $17.50 in Orange County; $17.03 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>Accountant 1/Staff</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Accountant 2/Senior Staff</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Accountant 3/Supervisor</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Accountant 4/Manager</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Accountant 5/Senior Manager</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Accountant 6/Director</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1927 and headquartered in Irvine, White, Nelson, Diehl, Evans, LLP (WNDE) (www.wndecpa.com) is an accounting firm offering financial accounting, audit services, tax planning, estate & trust planning, government advisory services, and business consulting services. The firm provides business support services to companies within the technology, healthcare and manufacturing industries and financial accounting and audit services to not-for-profit organizations and government agencies. The Company has one other location in San Diego.

PROJECT DETAILS

WNDE’s customer base has grown steadily over the last few years requiring its workforce to stay current on all services the firm provides and increase efficiency and production capabilities to meet the increase in customer demand. WNDE assesses business and respective training needs based on department services and the needs of each customer segment:

- Tax Department: Employees must understand the newest changes in tax laws related to the Tax Cuts and Jobs Act of 2017 and revenue recognition rules implemented by the

- Audit Department: Employees must understand the newest changes in accounting rules, generally accepted accounting principles (GAAP), governmental auditing standards, and the firm’s approach to audit management. Training will focus on Auditing, Detection & Reporting of Fraud, Governmental Auditing/Environment and Financial Institution Auditing Principles.

- Business Advisory Department: Employees must maintain skills in consulting services related to taxation, audits, retirement plans, and compensation plans. Training will focus on Tax Compliance, Employee Business Plans and Best Practices.

Managers/Supervisors

Partners/Executives are not included in this proposal. Partners/Executives are the only employees at the company that directly manage other staff and have hiring/firing responsibility. Directors, Senior Managers, Managers and Supervisors included in this proposal are product knowledge experts, work on a variety of projects, make sure tasks are completed on time and direct team members on different aspects of a project. They are frontline workers at the firm and do not meet the Panel’s definition of top-level executives and/or managers/supervisors.

Training Plan

Training will be delivered via Class/Lab and E-Learning in the following:

**Business Skills:** Training will be provided to all occupations. Training will focus on building quality Customer Relationships, effectively preparing and delivering analyses and recommendations in a professional manner, along with effective Project Management and Business Development/Selling Skills.

**Commercial Skills:** Training will be provided to all occupations. Training will focus on changes to the IRS tax code and banking and securities regulations that will be covered by Tax Compliance, Tax Regulations and Accounting & Auditing training.

**Computer Skills:** Training will be provided to all occupations. Training will focus on improving employee productivity by helping staff achieve intermediate and advanced skills to create databases, spreadsheets, reports, charts, graphs, and professional presentation materials. Training will center on CCH Pro fx Tax Software, Checkpoint Tax Research software and IDEA Case Analytics software.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Labor law and legal issue training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. WNDE estimates it currently spends $64,000 on training per year at each of its California locations. The Firm currently provides 18 different courses designed to further business and technical capabilities. ETP funding will allow the Firm to offer more cross-training to increase knowledge, technical expertise, and client service capabilities.
Training Infrastructure

Training will be delivered by in-house subject-matter experts and vendors as needed. One of WNDE’s Audit and Assurance Partners and a full-time staff member in the Irvine office will be dedicated to head the program internally and coordinate the training administration between both locations. WNDE has also partnered with Training Refund Group to assist with administration.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

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

ADMINISTRATIVE SERVICES

TRG 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
- Business Development/Selling Skills
- Customer Relationship
- Project Management

**COMMERCIAL SKILLS**
- Best Practices
- Accounting & Auditing
- Detection & Reporting of Fraud
- Governmental Auditing/Environment
- Regulatory Review
- Tax Regulations
- Tax Compliance
- Estate Planning
- Employee Business Plans
- Securities Exchange Commission Rules
- Financial Institution Auditing Principles

**COMPUTER SKILLS**
- Microsoft Office (Intermediate & Advanced)
- Checkpoint Tax Research Software
- CCH ProSystem fx Tax Software
- Audit Management Software
- QuickBooks
- IDEA Data Analytics Software

E-Learning
0-200

**BUSINESS SKILLS**
- Leadership
- Communications
- Team Building
- Presentation Skills
- Conflict Resolution
- Business Development/Selling Skills
- Customer Relationship
- Project Management
COMMERCIAL SKILLS
- Best Practices
- Accounting and Auditing
- Detection & Reporting of Fraud
- Governmental Auditing/Environment
- Regulatory Review
- Tax Regulations
- Tax Compliance
- Estate Planning
- Employee Business Plans
- Securities Exchange Commission Rules
- Financial Institution Auditing Principles

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

Agreement Number: ET19-0187

Panel Meeting of: July 27, 2018

ETP Regional Office: San Diego  Analyst: C. Clady

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>SET Job Creation Initiative Retraine</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Retraine Priority Rate</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>Yes  No</td>
</tr>
<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 Painters &amp; Allied Trades</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>District Council 36 Local 636</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>N/A</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>$82,472</td>
<td>$0</td>
<td>$0</td>
<td>$82,472</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $137,545
## 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>Retraineen SET</td>
<td>Business Skills, Computer Skills, Cont. Imp., Comm'l. Skills, OSHA 10/30 PL-Comm'l. Skills</td>
<td>87</td>
<td>8-200</td>
<td>0</td>
<td></td>
<td>$936</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td>Priority Rate</td>
<td>Weighted Avg: 36</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>SET</td>
<td>Business Skills, Computer Skills, Cont. Imp., Comm'l. Skills, OSHA 10/30 PL-Comm'l. Skills</td>
<td>1</td>
<td>8-200</td>
<td>0</td>
<td></td>
<td>$1040</td>
<td>$14.58</td>
</tr>
<tr>
<td></td>
<td>Job Creation Retraineen Priority Rate</td>
<td>Weighted Avg: 40</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 of local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

**Minimum Wage by County:** Job Number 1 (SET/Priority Industry): $22.77 per hour

Job Number 2 (SET/Job Creation): $14.58 per hour in Orange County

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

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

Up to $2.50 per hour 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>Estimating /Sales</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Accounting/ Administration</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Project Leads</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Production Glazier</td>
<td>64</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production Glazier</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1981 and located in Tustin, Woodbridge Glass Inc. (Woodbridge) is a contract glazing company specializing in the design, engineering, fabrication, assembly, glazing and installation of glass panels for medium and high-rise buildings. Clients include architects, designers, general
contractors, glazing and waterproofing consultants. This is Woodbridge’s first ETP Agreement. All training will be provided at its single facility in Tustin.

**PROJECT DETAILS**

The glass design industry has become very competitive, and customers are demanding higher level of service and quality standards. To maintain and grow its business, Woodbridge must train staff to provide excellent customer service and procure larger projects.

To meet increased business needs, Woodbridge has implemented Office 365, which includes Skype for Business, Sharepoint, One Note, Outlook, and Advanced Excel. This software will help the Company stay current with industry standards and remain competitive.

Production Staff will receive hard skills training in addition to using various software programs to communicate more effectively. Administration and Sales Staff will receive training focused on reports, job cost reporting and goal setting to communicate in a business environment. Accounting and Administration staff will receive training to increase product knowledge, and become more efficient with computer software updates.

**Retrainees - Job Creation**

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

As part of its plan to expand its current business capacity, Woodbridge will hire one Production Worker (Job Number 2).

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

**Union Support**

Workers are represented by Painters & Allied Trades District Council Local # 636, Glaziers, Architectural Metal & Glassworkers Union. A union letter of support has been submitted.

**Training Plan**

**Business Skills:** Training will be offered to all occupations in Accounting/Auditing, Coaching, Customer Relations, Goal Setting, Product Knowledge and Time Management.

**Commercial Skills:** Training will be provided to Production Staff in Blueprint Reading, Construction Techniques, Glass Fabrication 7 Installations, Job Site procedures and Leadership Energy Environmental Design.

**Computer Skills:** Training will be provided to all occupations in Blue Beam, Email – marketing tools, Mass 500 and Office 365.

**Continuous Improvement:** Training will be provided to Administration and Sales Staff to improve project management and customer relations. Course topics include Change Management, Hazard Analysis and Critical Control Points, Performance Improvement and Process Quality Improvement.
Certified Safety Training

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

Productive Lab

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.

Production Glaziers Staff will receive PL training on products and new techniques. Staff will be trained in PL-Commercial Skills including forklifts, tools, glass handling and storage, caulking and tool identification. PL training will enable trainees to perform their duties efficiently.

Trainees will be present at all times and are fully qualified in the specific area of training. The trainers will assign projects with step-by-step instructions. Up to 32 hours of training will be provided at a 1:1 trainer-to-trainee ratio to allow training onsite for workers to use various equipment.

Special Employment Training

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

Trainees work in an industry designated for “priority funding” by the Panel. These trainees qualify for a wage modification of up to 25% below the SET wage. Woodbridge requests a wage modification from $30.36 per hour to $22.77 hour for trainees in Job Number 1.

Commitment to Training

Woodbridge training budget consists of approximately $95,000 annually including basic safety training, Computer-Aided Drafting, New Hire Orientation, along with other mandatory training. Safety training will continue to be, provided in accordance with all pertinent requirements under state and federal law. ETP funds will not displace the existing financial commitment to training.

➢ Training Infrastructure

The Human Resource Manager, President and Vice President will oversee project administration including scheduling training, and collecting rosters. In addition, the Company retained Training Funding Source, Inc. (TFS) to assist with administration. Training will be conducted by in-house experts.

RECOMMENDATION

Staff recommends approval of this proposal.
DEVELOPMENT SERVICES

TFS in Seal Beach assisted with development for a flat fee of $4,900.

ADMINISTRATIVE SERVICES

TFS will also perform administrative services for an amount not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Accounting/Auditing
- Coaching
- Communication
- Credit & Collection Skills
- Customer Relations
- Goal Setting
- Inventory Control
- Leadership
- Marketing/Sales
- Product Knowledge
- Project Management
- Time Management
- Writing

**COMMERCIAL SKILLS**
- Blueprint Reading
- Construction Techniques
- Equipment Operations/Maintenance
- Glass Fabrication & Installation
- Green Building Techniques
- Inspection Techniques
- Inventory Control-Cycle Counting
- Job Site Procedures
- Leadership Energy Environmental Design
- Quality Control
- Warehouse Procedures (Shipping, Receiving, Order picking/packing)

**COMPUTER SKILLS**
- Adobe
- Auto CAD
- Blue Beam
- ERP/MRP Financial Accounting
- E-Mail Marketing Tools
- Mas 500
- MS Project
- Office 365
- Report Generation

**CONTINUOUS IMPROVEMENT**
- Change Management
- Hazard Analysis and Critical Control Points
- Performance Improvement
- Process/Quality Improvement
**OSHA 10/30** (Certified OSHA Instructor)
- OSHA 10
- OSHA 30

**Productive Lab Hours**
0-32

**COMMERCIAL SKILLS** (Ratio 1:1)
- Caulking
- Equipment Operations & Maintenance
- Field/ Site Operational Procedures
- Glass Handling and Glass Storage
- Identification of Glass Types, Symbols and Isometric Drawings
- Installation Procedures
- Layout Procedures
- Materials Handling and Storage
- Mock Up’s
- Product Knowledge
- Tool Identification

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
May 17, 2018

The Employment Training Panel
1100 J Street, Fourth Floor
Sacramento, CA 95814
Attn: Ms. Jill Mc Aloon,
Acctg. Executive Director

Re: Union Support for ETP Funding

Ms. Jill Mc Aloon,

This letter is to confirm support by Glaziers Local Union 636 for Woodbridge Glass, Inc. proposed training to be submitted to Employment Training Panel.

Sincerely,

Mark Bartlett,
Business Representative
District Council 36
Glaziers, Architectural Metal and Glass Workers
Local Union 636
RETRAINEE - JOB CREATION

Training Proposal for:

Trojan Battery Company, LLC

Agreement Number: ET19-0177

Panel Meeting of: July 27, 2018

ETP Regional Office: North Hollywood       Analyst: M. Webb

PROJECT PROFILE

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

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles</td>
<td>Yes</td>
</tr>
<tr>
<td>Repeat Contractor:</td>
<td>No</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA: 400</td>
</tr>
<tr>
<td>U.S.: 959</td>
</tr>
<tr>
<td>Worldwide: 1,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>18%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(% of total trainees)</td>
</tr>
<tr>
<td>11%</td>
</tr>
</tbody>
</table>

FUNDING DETAIL

Program Costs: $247,000

(Substantial Contribution) $0

(High Earner Reduction) $0

Total ETP Funding: $247,000

In-Kind Contribution: 100% of Total ETP Funding Required: $272,000
# 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, Cont. Imp., Literacy Skills, Mfg. Skills, HazMat, OSHA 10/30</td>
<td>200</td>
<td>8-200</td>
<td>0-10</td>
<td>$1,040</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraineepriority rate</td>
<td>Business Skills, Computer Skills, Cont. Imp., Literacy Skills, Mfg. Skills, HazMat, OSHA 10/30</td>
<td>25</td>
<td>8-200</td>
<td>0-10</td>
<td>$1,560</td>
</tr>
<tr>
<td></td>
<td>Job Creation</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.

**Minimum Wage by County:**  
Job Number 1: $17.54 per hour for Los Angeles County.  
Job Number 2 (Job Creation): $14.62 per hour for Los Angeles County.

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

**Used to meet the Post-Retention Wage?**  
☑ Yes ☐ No ☐ Maybe  
Up to $2.50 per hour 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>Operations Staff (Production)</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td>Support Staff</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Lead Staff</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Administration Staff</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administration Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Operations Staff (Production)</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1925 and headquartered in Santa Fe Springs, Trojan Battery Company, LLC (Trojan Battery) (www.trojanbattery.com) manufactures deep-cycle batteries, deep-cycle AGM and gel batteries. The Company pioneered the development of deep-cycle battery technology for the golf industry, successfully introducing mobilization to the game of golf. Additional products have since prevailed with battery advances in renewable energy, transportation, floor machines, aerial work platforms, marine and recreational vehicles.

Customers include Rovel Trading, Factory Motor Parts Co., and Pack Mule. Training will take place at Santa Fe Springs and Whittier locations. This will be Trojan Battery’s first ETP Agreement.

PROJECT DETAILS

To increase efficiencies, Trojan Battery has purchased new equipment for an estimated $3M. This equipment includes artificial intelligence with robots, and dual max technology. Robots will complete 20% of warehouse duties, placing batteries on assembly lines, stacking and loading battery plates. Trainees will learn to operate and program robots to maximize usage on the production floor. In addition, workers will train to independently assemble and ship.

Training will include The Trojan Way and Trojan Focus 6. These courses address elimination of lead dust accumulated from manufacturing lead batteries. Staff will also train in the production process or business operations/planning process to increase productivity and efficiencies. Courses will include Statistical Process Control, Customer Relations, Inventory Control, Sales Forecasting and Team Building.

Administrative Staff will train on a new software program, New Workday. This program was developed to monitor company headcount and finance management. Training will also include a new product, Dual Max. This product uses less lead with higher energy density and other architectural changes. This promotes more stable performance over the lifetime of the battery.

Training Plan

Class/lab and Computer-Based Training (CBT) will be provided in the following:

**Business Skills:** Training will be offered to all occupations to improve business operations and processes. Training topics will include course topics on business planning/administration, decision making, team building and product knowledge.

**Hazardous Materials:** Training will be offered to Warehouse and Support Staff to utilize safe practices when handling hazardous materials. Training will ensure safety precautions are taken and reduce the number of accidents.

**Computer Skills:** Training will be offered to all occupations to increase employee skills and introduce staff to upgrades with internal computer software programs and systems utilized by the company. Training will be provided on material resource planning software, Microsoft Office and Plotter software.

**Manufacturing Skills:** Training will be offered to Operations and Warehouse Staff to improve employee capabilities and introduce new processes in Trojan Battery’s manufacturing process. Cross-training will increase employee ability to operate multiple machinery on the production floor.

**Continuous Improvement:** Training will be offered to all occupations to increase efficiencies and productivity. Topics provided will include Total Quality Management, Process Improvement and Problem Solving.
**Literacy Skills:** Training will be offered to all occupations who speak English as a second language and need to improve use of the English language. Training delivered will improve staff ability to communicate, and execute job duties on a daily basis.

**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 frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

**Retraineer - Job Creation**

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

Trojan Battery has committed to hiring 25 new Operations, Warehouse and Administrative Staff (Job Number 2). Newly hired workers will be hired to support the Company’s efforts to expand existing business capacity and operate new machinery. Trainees will receive job-specific training to ensure workers can complete day-to-day tasks in an efficient manner. Curriculum topics will include content on computer software systems, administration, production operations, and product knowledge. 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**

Trojan Battery spends approximately $500k on training annually per facility in new hire orientation training, policy updates, safety training (as needed), and on-the-job training.

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

- Training Infrastructure

The Senior Director of Human Resources will oversee administration of this training project. Additional staff will assist with administration. Training will be delivered by in-house experts.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

Judith’s Training Services (JTS) in Los Angeles assisted with development for a flat fee of $19,760.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting
- Administration
- Business Administration
- Business Planning
- Business Report Writing and Editing
- Coaching Procedures
- Customer needs-Complaints, Credit Card Sales, Cash Sales
- Customer Relations/Identifying Customer Needs/Telephone Skills/Complaints
- Decision Making
- Evaluations
- Financial Strategy
- Interpersonal Skills
- Inventory Control
- Leadership
- Marketing
- Merchandising
- Monitoring
- Motivation
- Negotiating
- Payroll
- Product Knowledge
- Product Knowledge
- Refunds, Exchanges, Voiding Transactions
- Strategic Planning
- Team Building
- Train-the-Trainer

**COMPUTER SKILLS**

- 2&3 Isometric Drawings
- Auxiliary Hardware
- Graphic Representation
- Computer Assisted Drafting/Manufacturing
- Certified Network Engineer
- Web Programming (JAVA, cold fusion, active server pages)
- Computer Programming Languages (Visual Basic, c++),
- Printed Circuit Design
- Oracle, (database, management and storage)
- Robot Stacker- Sophisticated computer-operated machinery
- Microsoft Office
- Manufacturing Resource Planning (MRP/ERP/SAP/Oracle)
  - Integrated Material Management
  - Accounting Systems
  - Computerized Scheduling
• Sales Forecasting
• Material Resource Planning
• Inventory Control
• Purchase Order Tracking
• Cost Accounting
• Engineering/Document Control
• Personnel
• Payroll
• General Accounting
• New Work Day
• Plotter Use
• Computer Programming
  • Designing and Developing Software & Applications
  • Social Media Content
• Computer Networking (Hardware and Software)
  • Local Area Networks
  • Wide
  • Metropolitan
  • Network Management
  • Certified Novell Assistance
  • Certified Network Engineer
  • World Wide Web

CONTINUOUS IMPROVEMENT
• Artificial Intelligence Robot Technology and communications
• Automation
• Decision Making
• Dual Max
• Equipment Operations/repair
• Forklift
• ISO – 9000- 9005
• Just In Time process
• Kerri Performance Indications
• Leadership Skills for Frontline Workers
• Learn – TSNH – Think Smarter Not Harder
• Problem Solving
• Process Improvement
• Production Operations/Workflow
• Production Scheduling
• Project Management
  • Strategic Planning, Evaluations, Monitoring
• Quality Concepts
• Statistical Process Control
  • Methods to Monitor Quality Control during Production
  • Interpreting Charts and Graphs
  • Pareto
  • Histogram
  • Fishbone Diagrams
  • Statistical Analysis
• Team Building
• The Trojan Way
- Total Quality Management
- Trojan Focus 6

**HAZARDOUS MATERIALS**
- Hazardous Material Handling – Lead Occidental
- Hazardous Chemical Cleaning/Handling
- Hazardous Waste Handling

**LITERACY SKILLS**
- Vocational English as a second language – Writing, Reading, Comprehension
- Vocational English – Writing Letters and Business Reports, Reading Work Orders, Safety Regulations and other Documents, Language Comprehension, Understanding Verbal Direction and Instruction

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

**MANUFACTURING SKILLS**
- Assembly/Creation/Procedures
- Production Operation
- Parts and Products Manufacturing
- Equipment Operation
- Inventory Control
- Warehousing
- Manufacturing Practices
- Cross Training in Production Equipment/Skills
- Curing Chamber Training (New big ovens to cure the battery plates)

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

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

**CBT Hours**
0-10

**BUSINESS SKILLS**
- Managing Heavy Workloads (1 hour)
- How to Deliver Grand Slam Customer Service (1 hour)
- Managing Emotions Under Stress (1 hour)
- Managing Chaos and Pressure at Work (1 hour)
- Managing Employees who are Stretched to the Max (Ellis Only) (1 hour)
- Top 10 Survival Skills for First Time Supervisors (Ellis Only) (1 hour)

**COMPUTER SKILLS**
- Advanced Microsoft Excel (2 hours)
- Advanced Microsoft Power Point (2 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:

Rush Truck Centers of California, Inc.

Agreement Number: ET19-0172

Panel Meeting of: July 27, 2018

ETP Regional Office: San Diego               Analyst: K. Hernandez

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainee SET</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Job Creation Initiative</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Industry Sector(s):</th>
<th>Wholesale Trade</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Los Angeles, San Bernardino, San Diego</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Repeat Contractor:</th>
<th>No</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 463</th>
<th>U.S.:6,641</th>
<th>Worldwide: 6,641</th>
</tr>
</thead>
</table>

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

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

FUNDING DETAIL

Program Costs - (Substantial Contribution) - (High Earner Reduction) = Total ETP Funding

| $219,920 | $0 | $0 | $219,920 |

In-Kind Contribution: 100% of Total ETP Funding Required

| $725,267 |
### 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 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: $30.36 per hour SET Wage
- Job Number 2 (Job Creation): $14.62/hr in Los Angeles, $14.19/hr in San Diego, $13.66/hr in San Bernardino

### 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 $2.46 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>BS Tech Level 4 - RTC</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>BS Tech Level 5 - RTC</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Cashier</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Mobile Service Tech Level 3</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Mobile Service Tech Level 4</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Painter</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Part Sales Associates</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Service Tech Level 3</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>Service Tech Level 4</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Service Tech Level 5</td>
<td>17</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1965 and headquartered in Fontana, Rush Truck Centers of California, Inc. (Rush Truck) (www.rushtruckcenters.com) operates a network of commercial vehicle dealerships primarily focused on selling commercial vehicles manufactured by Peterbilt, International, Hino, Ford, Isuzu, and Mitsubishi. The Company also provides customers with a one-stop service center featuring sales of new and used commercial vehicles, aftermarket parts sales, service and repair facilities, financing, leasing, rental vehicles, CNG fuel systems, vehicle telematics products and insurance products. Customers include regional and national truck fleets, corporations, and local and state governments. The Company has eight locations participating in this proposal (San Bernardino, Los Angeles and San Diego Counties).

PROJECT DETAILS

Rush Truck must keep up with technological changes to ensure continued growth. The Company is replacing the current SAP enterprise software platform with Microsoft Dynamics 365. The new system will unify global financials and operations while managing specific business processes across marketing, sales, service, finance, operations, and talent. The new system will require significant training for all employees. In addition, the Company must train employees on new systems including SharePoint, UtilPro, and Document Management Software Systems.

Additionally, the complexity of engines and other truck equipment has increased dramatically over the past five years. Beginning Service Technicians require significant training to be ready to work on the shop floor. To meet this challenge, Rush Truck has invested significant capital in equipment and resources required to provide the training to get all Service Technicians ready to deliver repair services. Commercial Skills training will focus on 3D Measuring Systems, Advanced Materials and Composite Repair, Aluminum Bonding and Structural Repair and Engine Repair/Replacements.
**Turnover Waiver Request**

The ETP program is designed to fund training for stable, secure jobs. Thus, the employer's turnover rate cannot exceed 20% annually for the facility where training is requested. But the Panel may accept a higher turnover rate if the employer provided evidence that the proposed training will significantly decrease the turnover, or if the employer experienced a singular reduction in workforce, or if industry data supports a higher turnover rate. The Panel may, or may choose not to, impose a “turnover penalty” when the company crosses this 20% threshold. (*Title 22, CCR, Section 4417.*)

If the Panel chooses to impose a turnover penalty, failure to stay under a maximum rate will trigger forfeiture of 25% of the amount earned for each trainee. The trigger rate is typically 20%, as measured by turnover during the 12-month period preceding termination of the ETP Agreement. (*Title 22, CCR, Section 4417(b).*

Of the eight California locations, five (Fontana-Vocational, Pico Rivera, San Diego, Sylmar, and Whittier) have a turnover rate between 22% to 25% for calendar year 2017. The remaining locations are less than 20%.

Rush Truck’s proposed training will significantly decrease turnover. The Company started a company-wide initiative focused on decreasing turnover rate in late 2015 (33% in 2015, 31% in 2016, 20% in 2017, and most recently 9.5% since January 1). Rush Trucks contributes high turnover to the immense demand for Technicians within the industry. A shortage of skilled Technicians was created by a decrease in the talent pool due to a decline in technical school enrollment and the retirement of experienced Technicians. In order to combat these challenges, the Company has implemented a more robust New Hire Orientation program and formalized Service Technician recruiting, training and retention efforts (including a mentor program for first year Service Technicians). The new initiative includes a dedicated team of Technician Recruiters/Trainers and weekly meetings designed to address and rectify issues with new Service Technicians during their first six months of employment.

Rush Truck projects all its locations will reach a turnover rate of 20% or less by the end-of-term. Therefore, Rush Truck agrees to the 25% withhold if the turnover rate for the 5 locations is not reduced to 20% or less.

**Retraineep - Job Creation**

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

Rush Truck will expand business capacity by hiring 50 new employees (Job Number 2) to an existing function. The Company has grown (sales and servicing) significantly over the last few years requiring the Company to hire employees to keep pace with customer demand. The date-of-hire will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

**Training Plan**

Training will be delivered via Class/Lab and Productive Lab (PL) in the following:

**Business Skills:** Training will be provided to all occupations in Customer Care Skills, Customer Engagement, Understanding Finance and Operational Metrics, Conflict Resolution and Educating the Consumer. Training topics will increase customer satisfaction and knowledge of business processes.
Commercial Skills: Training will be provided to Service Technicians to emphasize safe operation and proficiency of equipment. Training topics include Fuel Systems Repair, Exhaust Systems, Warehouse distribution, Inventory Control, Root Cause Analysis and Lean Process and Integration. Training will ensure consistency in repair and inventory procedures across all facilities.

Computer Skills: Training will be provided to all occupations in Microsoft Dynamics 365. Technicians and Parts Specialists will also be offered Mechanical Estimating, Parts Inventory, CRM and Procurement Software and ServiceLink.

Continuous Improvement: Training will be provided to all occupations to sustain and enhance growth. Training includes ISO Skills, Lean/Six Sigma and Project Management.

Manufacturing Skills: Training will be provided to Service Technicians in Lean Manufacturing, Welding Skills and Alternative Fuel System Installation. Training will help Service Technicians to better manage increased production demands.

Certified Safety Training

1. 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, Service Tech Level's 1-5 will receive up to 24 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, the certification entity has not yet been determined.

Productive Laboratory

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

Rush Truck will provide approximately 40 hours of PL in Commercial Skills for 85 Service Technicians to supplement Class/Lab training. PL training will enable workers to train on actual projects: preventative maintenance techniques, body repair, emission diagnostics, and alternative fuel system installation. Trainees will utilize the following equipment: resistance spot welder, metal inert gas welder, engine diagnostics, measuring system, paint spray gun, estimating system and various hand tools. Training will be at a much slower pace than regular operations with higher defects as trainees gain proficiency.

Trainers are subject-matter experts. Trainees will be under direct supervision at all times. The trainer's role will be to impart knowledge, observe, verify comprehension, and submit appropriate training documentation to the training department. The typical trainer to trainee ratio for PL training is 1:1. However, Rush Truck requests a PL ratio of 1:3 because a percentage of PL is typically delivered in small teams of 3. This is the most effective method for PL.

Computer-Based Training (CBT)

CBT training will be provided as an extension to Rush Truck’s Class/Lab training. This additional training will ensure trainees are increasing information retention. CBT training will focus on critical Commercial Skills.
Commitment to Training

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. In 2017, Rush Truck invested $300,000 in training. ETP Funding allows the Company to enhance the training program and expand it to more employees.

- Training Infrastructure

  Training will be delivered by the Company’s in-house trainers; vendors will be retained as needed. The project will be managed by the Learning and Development Manager (LDM) with assistance from the Training Coordinator and Grant Manager. The LDM will oversee the training plan and work directly with department leads and trainers to implement training. The Company’s Training Coordinator and Grant Manager will schedule and coordinate training efforts with Administrative Assistants at each location to ensure the proper record keeping procedures are in place.

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
08-200

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Communication Skills
- Customer Experience/Customer Support
- Data Collection and Recordkeeping
- Effective Business/Technical Writing
- Finance/Accounting Skills
- Marketing/Sales Skills
- Materials Selection/Product Optimization
- New and Revised Standard Operating Procedures
- Presentation Skills
- Procurement/Supply Chain Management
- Rush Truck’s Business Model

**COMMERCIAL SKILLS**
- 3 Stage Refinishing Process
- 3D Measuring Systems
- AC Systems
- Active Lane Keeping Systems
- Adhesive Bonding
- Advanced Materials and Composite Repair
- Aluminum Bonding and Structural Repair
- Aluminum Tools and Minor Repair
- Collision Repair Skills
- Color Theory and Matching Principles
- Drive Systems
- Emergency Clean Up Procedures
- Engine Repair/Replacements
- Estimating Hybrid and Electrical Vehicles
- Estimating Mechanical and Electrical Systems
- Estimating Steering and Suspension Damage
- Exhaust Systems
- Fuel Systems Repair
- Handling Chemicals and Clean Up Procedures
- Hybrid and Electric Repair
- Hybrid Vehicle Battery/Charging Systems
- ICAR Collision Repair/Refinish Skills
- Just-In-Time Inventory Control/Protocol
- Lean Process and Integration
- Maintenance Repairs
- Managing MSDS Sheets
- OEM Certifications
- Paint Spray Gun Set-Up and Maintenance
- Pillars and Rail Replacement
- Plastic and Composite Repair
- Problem Solving and Decision Making Skills
- Product Knowledge
- Refinish Skills
- Resistance Spot Welding
- Root Cause Analysis
- Steering, Suspension and Mechanical Systems
Surface Preparation
Transmission Diagnosis and Repair
Vehicle Priming and Sealing
Warehousing Automation and Robotics
Microsoft Server
Power Electronics
Product Change Management Process and Best Practices
Product Lifecycle Management
Vehicle Dynamics

COMPUTER SKILLS
Microsoft Dynamics 365 Skills
Computer Programming and Software Maintenance
Web Development
Network Management
Concur System Skills
Programming Skills
SQL
Document Management Software Systems
Information Security
Computer-Aided Three-Dimensional Interactive Application
Computer-Aided Diagnostics
Cybersecurity
Intermediate/Advanced MS Office Skills
Learning Management System Skills
SAP System Skills
SharePoint
Skype for Business Skills
UltiPro
Adobe Skills

CONTINUOUS IMPROVEMENT
Change Management
Environmental Sustainability Practices
ISO Skills
Leadership Skills
Lean/Six Sigma
Process Improvement/Efficiency Skills
Product Quality Planning/Product Liability
Project/Program Management
Risk Management Skills
Team Building
Time Management
Troubleshooting/Root Cause Analysis

HAZARDOUS MATERIALS
Hazardous Materials Training (e.g. adhesives, solvents, chemicals, paint etc.)
High-Voltage Battery and Systems Awareness

MANUFACTURING SKILLS
Automotive/Electrical Safety
Body Shop Equipment Operation/Maintenance
Electro Mechanical/Maintenance Skills
Engineering/Systems Skills
Forklift Training
Fuel Efficiency Best Practices
Hybrid, Electric and Alternative Fuel Vehicle Maintenance
Paint Equipment Operation
Paint Quality, Defects, Prevention, Repair
Paint Types and Application Techniques
Lean Manufacturing
Programmable Logic Control
Welding Skills
Alternative Fuel System Installation
Emission Control Systems & Diagnostics

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

**Productive Lab Hours**
0-40 Trainees may receive any of the following:

**COMMERCIAL SKILLS** (1:3 trainer-to-trainee ratio)
- 3D Measuring Set-Up/Analysis
- Aluminum Bonding
- Aluminum Repair
- Aluminum Welding
- Body Filler Methods
- Color Blending
- Color Tinting
- Estimating Advanced Materials Composite Structure
- Estimating Advanced Vehicle Systems
- Estimating Diagnosis
- Estimating DRP Procedures New Tech
- Metal Inert Gas Brazing
- Paint Spray Gun
- Resistance Spot Welding
- Rivet Bonding
- Scanning Analysis
- Structural Corrections with 3D Measuring
- Structural Welding
- Body Shop Equipment Operation/Maintenance
- Paint Shop Equipment Operation/Maintenance
- Hybrid Vehicle Manufacturing and Assembly Processes
- Hybrid Vehicle Power Electronics
- Manufacturing Equipment Skills/ Maintenance
- Manufacturing Fit and Finish/Quality

**CBT Hours**
0-100 Trainees may receive any of the following:

**COMMERCIAL SKILLS**
- Preventative Maintenance 101 (1.5 hours)
- Basics of Maintenance & Repair Costs (1.5 hours)
- Conflict Resolution for Different Groups (1.5 hours)
- Conflict Resolution Principles 150 (1.5 hours)
- Essentials of Communication 120 (1.5 hours)
- Intro to Managerial Accounting 145 (1.5 hours)
- Personal Effectiveness 190 (1.5 hours)
Product Design and Development 134 (1.5 hours)
Quality and Customer Service 175 (1.5 hours)
Continuous Process Improvement: Identifying and Eliminating Waste (1.5 hours)
Continuous Process Improvement: Managing Flow (1.5 hours)
Developing a Lean Culture (1.5 hours)
Essentials of Leadership (1.5 hours)
Management Tools: Problem Solving (1.5 hours)
Management Tools: Product and Process Design (1.5 hours)
Managing Performance: Best Practices (1.5 hours)
Managing Performance: Corrective Actions (1.5 hours)
Managing Practices for Total Quality (1.5 hours)
Process Design and Development (1.5 hours)
Process Flow Charting (1.5 hours)
Quality Overview (1.5 hours)
Team Leadership (1.5 hours)
Basics of the Bonding Process (1.5 hours)
Intro to Adhesive Bonding (1.5 hours)
Intro to Adhesive Properties (1.5 hours)
Steps for Adhesive Application (1.5 hours)
Surface Preparation (1.5 hours)
Types of Adhesives (1.5 hours)
Actuator Applications (1.5 hours)
Basic Hydraulic Circuit Design (1.5 hours)
Basic Pneumatic Circuit Design (1.5 hours)
Contamination and Filter Selection (1.5 hours)
Fluid System Print Reading (1.5 hours)
Hydraulic Control Valves (1.5 hours)
Hydraulic Fluid Selection (1.5 hours)
Hydraulic Power Sources (1.5 hours)
Hydraulic Power Variables (1.5 hours)
Hydraulic Principles and System Design (1.5 hours)
Advanced Hole Inspection (1.5 hours)
Basic Measurement 101 (1.5 hours)
Calibration and Documentation (1.5 hours)

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
Training Proposal for:
TTM Technologies, Inc.
Agreement Number: ET19-0162

Panel Meeting of: July 27, 2018
ETP Regional Office: San Diego
Analyst: H. Bernard

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraineep</th>
<th>Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Priority Industry: ☒ Yes ☐ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Orange, Santa Clara, San Diego</th>
<th>Repeat Contractor:</th>
<th>☒ Yes ☐ No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Union(s):</td>
<td>☐ Yes ☒ No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 1,276</th>
<th>U.S.: 5,900</th>
<th>Worldwide: 29,527</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turnover Rate:</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>18%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earnings Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$612,560</td>
<td>$0</td>
<td>$0</td>
<td>$612,560</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $657,539
## 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</td>
<td>Business Skills, Computer Skills, Cont. Improve., HazMat, Mfg. Skills, OSHA 10/30, PL - Mfg. Skills</td>
<td>760</td>
<td>8 - 200</td>
<td>0 - 100</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 State or local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

**Minimum Wage by County:** Orange County - $17.50 per hour, Santa Clara County - $18.22 per hour, San Diego County - $17.03 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 $2.50 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 &amp; Support Staff, Finance, Analyst, Planner</td>
<td>55</td>
<td></td>
</tr>
<tr>
<td>Operator, Warehouse, Production Associate</td>
<td>280</td>
<td></td>
</tr>
<tr>
<td>Technician, Inspector, Lead, Machinist</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>Engineering Staff, IT, Project Manager</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Engineer Director*, Technical Staff</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>55</td>
<td></td>
</tr>
</tbody>
</table>

*Engineer Directors are individuals who spend over 51% of their time producing products or services. They do not make corporate policy or manage other employees directly.

## INTRODUCTION

Founded in 1999 and headquartered in Costa Mesa, TTM Technologies, Inc. (TTM) manufactures printed circuit boards and backplane assemblies for both original equipment manufacturers and electronic manufacturing services providers. The Company serves a diversified customer base in various markets throughout the world, including manufacturers of networking and communications infrastructure products, personal computers, touch-screen tablets and mobile media devices (cellular phones and smart phones). The Company also has customers in the commercial aerospace and defense industry; and the industrial and medical industries. The Company has facilities in the U.S., Canada, China, and Hong Kong. TTM has 6 locations in California: Costa Mesa, Santa Ana, Anaheim, San Diego, San Jose, and Santa Clara that will be included in this project.
PROJECT DETAILS

This will TTM’s fifth ETP Agreement, the fourth in the last five years. Prior training focused on changing the Company culture into a learning organization. Training included Productive Lab-Manufacturing Skills and Computer Skills training for Production Staff; Leadership Skills for Managers and Supervisors.

Currently, TTM is expanding into the aerospace industry, working on projects of advanced radar systems used in military aircraft and ships. These rapidly changing technologies require constant training. The proposed training is designed to help the Company remain competitive, meet industry standards, keep abreast of changing technologies, and maintain a competent workforce. This project will also focus on cross-training for Production & Engineering Staff to ensure that production operators have the knowledge and skills necessary to make decisions on the disposition of products when Engineering Staff is unavailable, reducing downtime and errors. The Engineering Staff will be cross-trained at TTM locations across California to learn best practices for Lean Manufacturing.

TTM is implementing a manufacturing tracking software program, Fastrak, which monitors the entire manufacturing process from design conception through to delivery of the product to the customer. This software will be implemented companywide, requiring training for most staff. Training will be particularly important for Production Staff, Engineers, IT Staff and Support Staff.

Finally, the Company will provide Continuous Improvement Skills across all locations. This training is ongoing to ensure quality, reduce waste and train according International Traffic in Arms Regulations for its defense customers. TTM will also focus on Leadership Skills for its frontline supervisors and mid-level managers.

Training Plan

Training will be delivered at the Company’s facilities in California via Classroom/Laboratory, Productive Lab and Computer Based Training methodologies in the following:


**Computer Skills:** Adobe, Strategic Talent Management Software, CAD, IBM i5 Operating System Training, ADP Payroll, Marketing Tools.

**Manufacturing Skills:** Automated Optical Inspections, Machine Shop Processes, Critical Scrap Investigation, Advanced Mechanical Design, Document Control, and Institution for Printed Circuit Boards Training.

**Continuous Improvement:** Quality Audit Processes, Good Manufacturing Practices, Managing Multiple Priorities, Process Improvement, Project Management Skills.

**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.

**Hazardous Materials (HAZMAT):** This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to
“incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, TTM staff will receive 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 is CalTRANS.

Computer-Based Training

CBT will be provided to supplement Class/Lab training. Trainees in Job Number 1 will receive up to 100 hours of CBT.

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. Production skills are best learned through hands-on demonstration and practice as a supplement to classroom instruction. PL training will allow practical, real-world experience in a working environment.

TTM is requesting PL-Manufacturing Skills training for approximately 80-100 Production Staff, and Technicians. Training will be provided by in-house subject matter experts at a 1:1 trainer-to-trainee ratio. Trainees will receive an average of 40 hours of PL.

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. TTM will continue to provide introductory computer skills, safety, new hire orientation and anti-harassment training to its staff. Currently, the Company spends approximately $40,000 annually per location for a total of $240,000.

Training Infrastructure

The Corporate Training Manager and Quality Manager will oversee training and administration, with assistance from 5 Training Coordinators located at each site. TTM will utilize an administrative subcontractor, California Training Administration, Inc. for assistance with administration under this project. Training will be provided by in-house subject matter experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by TTM 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>ET16-0367</td>
<td>Various</td>
<td>3/6/16 – 3/5/18</td>
<td>$428,400</td>
<td>$418,372 (98%)</td>
<td></td>
</tr>
<tr>
<td>ET14-0285</td>
<td>Various</td>
<td>2/1/14 – 1/31/16</td>
<td>$345,600</td>
<td>$321,923 (93%)</td>
<td></td>
</tr>
<tr>
<td>ET12-0232</td>
<td>Various</td>
<td>12/26/11 – 12/25/13</td>
<td>$499,950</td>
<td>$330,530 (66%)*</td>
<td></td>
</tr>
</tbody>
</table>

*ET12-0232: The poor performance was attributed to the departure of the Project Manager shortly after project approval, and the subsequent delay in filling the position.

**DEVELOPMENT SERVICES**

TTM retained California Training Administration, Inc. in Rocklin to assist with development of this proposal for a flat fee of $2,500.

**ADMINISTRATIVE SERVICES**

TTM retained California Training Administration, Inc. in Rocklin 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:

**MANUFACTURING SKILLS**

*Manufacturing Cross Training*
- Manufacturing Process Instruction (MPI)
- Automated Optical Inspections (AOI)
- Supply Chain & Inventory Certification (APICS)
- Institution for Printed Circuit Boards (IPC)
- Cleanroom Certification
- Document Control/Work Change Orders
- Final Inspection
- Material/Product Handling
- TTM Processes
- Job Skills Update/Work Instructions WI
- Machine Shop Process/Electrostatic Discharge (ESD)
- First Article Inspection
- Shipping/Receiving Techniques
- Test/Reliability
- Warehouse/Inventory Processes

*Maintenance / Equipment Engineering Manufacturing*
- Critical Scrap Investigation (CSI)
- Industrial Electronics
- Lock Out/Tag Out (LOTO)
- Manufacturing Parameter

*Engineering Manufacturing*
- Advanced Mechanical Design
- Design Techniques
- Engineering Process Instruction (EPI)
- Hidden EndPoint Knowledge
- Nano-Scale Applications
- Process Review (Reader/Writer)
- Product Development
- Automated Optical Inspection System Programming (AOI)
- Cross Training

**HAZARDOUS MATERIALS**
- HazMat Process
- Confined Space
- HALT Operation
- Dept. of Transportation process (DOT)
- Transporting Haz. Materials (RCRA)
- Handling Haz Waste Certificate (IATA)
- Incident Commander
- Radiation/Cyanide
- Respirator/Hearing
OSHA 10/30
- OSHA 10
- OSHA 30

CONTINUOUS IMPROVEMENT
- TTM Company Process/Policy Updates (PPU)
- Quality Audit Processes (ASQ Certification / AS9100)
- Customer Communications (Internal/External)
- Effective Communications
- Efficiency/Quality Improvements
- Good Manufacturing Practices (GMP)
- High Performance Work-Teams (HPWT)
- Managing Multiple Priorities/Time-sensitive Deadlines
- New Lead/Supervisor Techniques
- Problem Solving/Process Improvement/Process Innovation
- Project Management Skills
- Quality 101/Lean Quality Improvements
- SPC
- Team Building/Relationship Building

Leadership / Coaching Skills
- Coaching
- Feedback
- Effective Communication
- Setting Goals

COMPUTER SKILLS

All Employee Systems & Tools
- Adobe
- Document Control System (DCS)
- Strategic Talent Management Software (TEDS, EVERFI)
- Microsoft Tools (Word, Excel, PowerPoint – Int. & Adv only)
- PeopleSoft
- SharePoint

Engineering Systems & Tools
- Software/Programming Languages (JMP/SAS)
- Computer Aided Design (CAD)

Manufacturing Tools
- IBM – i5 Operating System Training
- IBM – RPG Programming Training
- SysIS – Understanding MESA system architecture
- Fastrak Training

Finance / Accounting Systems & Tools
- Outlook
- PeopleSoft
- AST – Applicant Tracking System (CareerBuilder)
- Dynamics Tools
- ADP Payroll tools
- PlanSource Portal
- Marketing/Advertising Tools
BUSINESS SKILLS

- Business Development/Marketing
- Client Communication Skills
- Customer Service (CSI)
- Configuration Management
- Effective Presentations
- Efficiency/Quality Improvements
- Finance/Accounting Processes
- TTM Product Training
- Negotiation Skills/Professionalism
- Project Management
- Strategic Implementation/Strategic Planning
- Support Skills (Customer, Supplier, Sales)

Productive Lab (PL) Hours
0 - 60

MANUFACTURING SKILLS

- Manufacturing Process Instruction (MPI)
  - Equipment Certification
  - Equipment Maintenance
  - Material Handling
  - Operating Production Equipment
  - Testing / Troubleshooting

CBT (Self-paced) Hours
0 - 100

HazMAT SKILLS – CBT

- Confined Space - 2 hrs
- Cyanide Handling - 1 hr
- ERT Technician Core - 2 hrs
- HazCom – Global Harmonization system - 2 hrs
- HazCom Annual - 2 hrs
- Incident Commander - 8 hrs
- Laser Safety - 8 hrs
- LOTO (lockout/tagout) - 1 hr
- Machine Shop Annual Safety - 1 hr
- Radiation - 1 hr
- Stormwater - 1 hr
- Supervisory Safety - 1hr
- Wastewater Operations - 2 hr

OSHA 10/30

- OSHA 10 – 10 hrs
- OSHA 30 – 30 hrs

BUSINESS SKILLS

- Basic Presentation Skills: Creating a Presentation - 1 hr.
- Basic Presentation Skills: Delivering a Presentation - 1 hr.
- Basic Presentation Skills: Planning a Presentation - 1 hr.
- Basic Projects within Organizations (PMBOK Gide Fifth Edition) - 1.5 hr.
- Business Writing: Know Your Readers and Your Purpose - 1 hr.
- Customer Service: Confrontation and Conflict - 1 hr.
- Customer Service in the Field - 1 hr.
- Customer Service over the Phone - 1 hr.
- Decision Making: Making Tough Decisions - 1 hr.
- Decision Making: The Fundamentals - 1 hr.
- Decision Making: Tools and Techniques - 1 hr.
- Developing & Using Strategic Thinking Skills: Seeing the Big Picture - 1 hr.
- Generating Creative and Innovative Ideas: Team Creativity - 1 hr.
- Internal Customer Service - 1 hr.
- Interpersonal Communication: Being Approachable - 1 hr.
- Interpersonal Communication: Communicating Assertively - 1 hr.
- Interpersonal Communication: Communicating with Confidence - 1 hr.
- Interpersonal Communication: Listening Essentials - 1 hr.
- Interpersonal Communication: Targeting Your Message - 1 hr.
- Leading Innovation - 1 hr.
- Managing Projects within Organizations (PMBOK Guide) - 2 hr.
- Principles of Accounting and Finance for Non-Financial Professionals - 1 hr.
- Project Management Overview (PMBOK Guide Fifth Edition) - 1.5 hr.
- Public Speaking Strategies: Confident Public Speaking - 1 hr.
- Public Speaking Strategies: Preparing Effective Speeches - 1 hr.

**COMPUTER SKILLS**

- Advanced Customization in Excel 2007 - 2 hr.
- Advanced Data Management in Excel 2007 - 1.5 hr.
- Advanced Formatting in Excel 2007 - 2 hr.
- Analyzing Data in Excel 2007 - 3.5 hr.
- Excel 2007 Charts, Pictures, Themes, and Styles - 1.5 hr.
- Excel 2007 Formulas and Functions - 2 hr.
- Exchanging Data with Excel 2007 - 3 hr.
- Manipulating and Formatting Data and Worksheets in Excel 2007 - 3 hr.
- Protecting and Sharing Excel 2007 Workbooks - 2 hr.

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

**Vavrinek, Trine, Day and Co., LLP**

**Agreement Number: ET19-0170**

**Panel Meeting of:** July 27, 2018  
**ETP Regional Office:** San Diego  
**Analyst:** K. Hernandez

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes: Retrainee</th>
<th>Industry Sector(s): Financial Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Priority Industry:  □ Yes  □ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served: San Bernardino, San Mateo, Santa Clara, Alameda, Los Angeles, Orange, San Diego, Sacramento, Riverside, Fresno</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat Contractor: □ Yes  □ No</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 300</th>
<th>U.S.: 320</th>
<th>Worldwide: 320</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>15%</th>
</tr>
</thead>
</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>$217,488</td>
<td>$0</td>
<td>$0</td>
<td>$217,488</td>
</tr>
</tbody>
</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</td>
<td>Business Skills, Commercial Skills, Computer Skills,</td>
<td>197</td>
<td>8-200</td>
<td>0</td>
<td>$1,104</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $16.70 in San Bernardino, Fresno and Riverside counties; $16.80 in Sacramento County; $17.03 in San Diego County; $17.50 in Orange County; $17.54 in Los Angeles County; and $18.22 in Alameda, San Mateo and Santa Clara counties

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

**Used to meet the Post-Retention Wage?**: [ ] Yes [ ] No [ ] Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accountant 1/Staff</td>
<td>61</td>
<td></td>
</tr>
<tr>
<td>Accountant 2/Senior Staff</td>
<td>42</td>
<td></td>
</tr>
<tr>
<td>Accountant 3/Manager</td>
<td>39</td>
<td></td>
</tr>
<tr>
<td>Accountant 4/Consultant</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Accountant 5/Supervisor</td>
<td>41</td>
<td></td>
</tr>
<tr>
<td>Accountant 6/Director</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1948, Vavrinek, Trine, Day & Company, LLP (VTD) (www.vtdcpa.com) is an accounting firm offering audit, accounting, tax, fraud examination, and business consulting services. Headquartered in Rancho Cucamonga, VTD has nine California regional offices (San Mateo, Santa Clara, Alameda, Los Angeles, Orange, San Diego, Sacramento, Riverside and Fresno), and an office in Phoenix, AZ, that provides tax advice, financial statement audits, employee benefit plans, audit and business advisory services to businesses, higher education institutions, government agencies, and not-for-profit organizations. All California facilities are participating in this project.

This is the VTD’s second ETP Agreement, the second in the last five years. VTD’s first agreement focused on Commercial Skills and the Affordable Care Act’s impact on client’s taxes and operations. The project was focused on changes to accounting, tax and audit requirements at the federal, state and municipal level. However, recent passage of Tax Cuts and Jobs Act requires a significant amount of new training for VTD Accountants. All levels of VTD’s Accountants need to learn the impact of new law on their clients for planning and compliance. In addition, the new tax law will change the tax software used by all level of Accountants which requires training. This
training proposal includes the same average number of training hours as in the prior ETP Agreement.

PROJECT DETAILS

VTD’s objective is to add new clients and offer new professional services. To manage increased customer demand, Accountants must increase efficiency and production. Training for Accountants is focused on Commercial Skills and Computer Skills training.

Commercial Skills training will focus on the changes in tax law created by the Tax Cuts and Jobs Act and revenue recognition rules implemented by the Financial Accounting Standards Board. All levels of VTD’s Accountants will need significant training on Accounting, Auditing, Financial Planning, Tax Planning and Tax Preparation to effectively communicate how the tax law changes impact clients. Computer Skills training will be concentrated on training staff to fully utilize VTD’s CCH Pro System fx Tax software and IDEA Data Analytics software. Both software platforms are constantly changing, and VTD needs to train all levels of Accountants in the new features, filing requirements, new forms and budgeting modules related to each platform.

Managers/Supervisors

Partners/Executives are not included in this proposal. Partners/Executives are the only employees at the Company that directly manage other staff and have hiring/firing responsibility. Directors, Supervisors and Managers included under the occupational titles are product knowledge experts, work on a variety of projects, ensure tasks are completed on time, and work directly with team members on different aspects of a project. They are front line workers at the firm.

Training Plan

Training will be delivered via class/lab and E-Learning in the following:

Business Skills: Training will be provided to Accountants 1-6. Training will focus on developing skills in Client Management, Presentation Skills, Business Development and Sales Techniques in order to effectively interface with their current clients and present a compelling case to prospective clients.

Commercial Skills: Training will be provided to Accountants 1-6. Training will focus on changes in tax laws caused by the Tax Cuts and Jobs Act of 2017 and other regulatory changes from the IRS, SEC and Financial Accounting Standards Board. Training will help staff improve their skills for Auditing, Tax Planning and Financial Planning.

Computer Skills: Training will be provided to Accountants 1-6 to effectively utilize CCH ProSystem fx Tax Software, IDEA Data Analytics software, QuickBooks and the Microsoft Office suite of programs.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Labor law and legal issue training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. VTD estimates it currently spends $30,000 per year on training at each of the ten California locations. Rules change each year requiring staff to stay current with the rules that govern the way they do their job. However, training in this project does not support the attainment of a CPA license by Accountants 1-6 and it does not include continuing education training needed to maintain a CPA licensure or other professional certifications.
Training Infrastructure

Training will be delivered by in-house subject matter experts and vendors as needed. VTD’s Quality Control Partner and a full-time staff member in the Rancho Cucamonga office will be dedicated to head the program internally and coordinate the training administration among the ten locations with the assistance of office personnel in each location. VTD has partnered with Training Refund Group (TRG) to support its administrative efforts. The Company’s administrative coordinators will work with TRG to coordinate all training, ensuring compliance with all ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by VTD 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>ET17-0133</td>
<td>$123,000</td>
<td>07/01/16 – 06/30/18</td>
<td>205</td>
<td>170</td>
<td>0*</td>
</tr>
</tbody>
</table>

*Based on ETP Systems, VTD’s reimbursable hours have been tracked for potential earnings of $126,480 (100% of approved amount). The Contractor projects final earnings of 100% based on training hours that have already been entered in the system. Invoicing for Final Payments will occur before 07/30/18.

DEVELOPMENT SERVICES

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

ADMINISTRATIVE SERVICES

TRG 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**
- Client Management
- Conflict Resolution
- Leadership
- Marketing and Sales
- Business Development/Selling Skills
- Presentation Skills
- Report Writing
- Sales Technique

**COMMERCIAL SKILLS**
- Accounting
- Auditing
- Bank Review
- Estate Planning
- Financial Planning
- Fraud Prevention
- Not For Profit Auditing
- Tax Planning
- Tax Preparation
- Employee Benefit Plans

**COMPUTER SKILLS**
- MS Office (Intermediate)
- CCH ProSystem fx Tax Software
- QuickBooks
- Tax Research
- IDEA Data Analytics Software

E-Learning
0-200

**BUSINESS SKILLS**
- Client Management
- Conflict Resolution
- Leadership
- Marketing and Sales
- Business Development/Selling Skills
- Presentation Skills
- Report Writing
- Sales Technique

**COMMERCIAL SKILLS**
- Accounting
- Auditing
- Bank Review
- Estate Planning
- Financial Planning
- Fraud Prevention
- Not For Profit Auditing
- Tax Planning
- Tax Preparation
- Employee Benefit Plans

**COMPUTER SKILLS**
- MS Office (Intermediate)
- CCH ProSystem fx Tax Software
- QuickBooks
- Tax Research
- IDEA Data Analytics Software

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

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Critical Proposal Job Creation Initiative</th>
<th>Industry Sector(s): Biotechnology/Life Sciences Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Retraineet Priority Rate</td>
<td>Priority Industry: ☒ Yes ☐ No</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Alameda</td>
<td>Repeat Contractor: ☒ Yes ☐ No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>☐ Yes ☒ No</td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 700</td>
<td>U.S.: 8,409</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>(%) of total trainees) 13%</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>$899,522</td>
<td>$0</td>
<td>$0</td>
<td>$899,522</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In-Kind Contribution: 100% of Total ETP Funding Required</th>
<th>$1,347,177</th>
</tr>
</thead>
</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></td>
<td>Critical Proposal</td>
<td></td>
<td></td>
<td>Weighted Avg: 43</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Job Creation Retrainees Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills</td>
<td>175</td>
<td>8-200</td>
<td>$2,080</td>
<td>$15.18</td>
</tr>
<tr>
<td></td>
<td>Critical Proposal</td>
<td></td>
<td></td>
<td>Weighted Avg: 80</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Minimum Wage by County:
- Job Number 1: $18.22 per hour for Alameda County.
- Job Number 2 (Job Creation): $15.18 per hour for Alameda County.

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

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

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 Number 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>44</td>
<td></td>
</tr>
<tr>
<td>Production Staff</td>
<td>300</td>
<td></td>
</tr>
<tr>
<td>Engineer</td>
<td>75</td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Job Number 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production Staff</td>
<td>125</td>
<td></td>
</tr>
<tr>
<td>Engineer</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>25</td>
<td></td>
</tr>
</tbody>
</table>

### Critical Proposal

This proposal for Boehringer Ingelheim Fremont, Inc. (BIFI) has been designated a Critical Proposal by the Governor’s Office of Business and Economic Development (GO-Biz) based on the Company’s planned expansion and commitment to adding new jobs in California.
INTRODUCTION

BIFI (www.boehringer-ingelheim.com) is a subsidiary of the family-owned parent corporation-Boehringer Ingelheim (Boehringer). Boehringer is a global pharmacology corporation, which researches and produces human and animal pharmaceuticals.

BIFI is a contract biopharmaceutical development and manufacturing (small scale to commercial) offering drug-substance manufacturing to fill/finish, packaging and medical device assembly. BIFI produces pharmaceuticals for patients with serious diseases and medical conditions like cancer and chronic inflammatory disorders.

This is BIFI’s fourth ETP project, the fourth in the last five years. The previous training focused on new equipment and new technology-based skill upgrades (software, manufacturing processes and ISO). This ETP-funded training will assist BIFI expand its markets, grow its manufacturing workforce in California, and remain competitive globally. Any workers trained under a previous Agreement will receive different training courses based on new technology, processes, and equipment. ETP-funded training will be delivered only in Fremont.

Retrainee - Job Creation

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

BIFI has committed to hiring 175 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.

BIFI’s parent company, Boehringer Ingelheim, is investing $217 million to upgrade and expand BIFI’s Fremont manufacturing facility over the next several years. This investment will increase its manufacturing capacity and its overall business capacity to grow in California. New equipment will include a third bioreactor and other advanced manufacturing technologies including robotic systems and high-tech analytical tools.

PROJECT DETAILS

Training Plan

Training will be delivered via Class/Lab, E-Learning, and Productive Lab (PL) in the following:

Business Skills: Training will be offered to all occupations in technical writing, how to manage projects, marketing communications, finance, and preparing effective oral and written presentations to customers. Due to the complexity of BIFI’s products and business transactions, international-business regulations dictate that effective customer communications and order accuracy must be achieved.

Computer Skills: Training will be offered to Engineers, Managers and Supervisors. Courses include desktop applications such as advanced levels of computer-assisted design software, personal productivity software applications, and BIFI’s in-house business computer applications for inventory, account management and manufacturing control.

Manufacturing Skills: This training will be offered to Production Staff and Engineers to operate, maintain, and troubleshoot biotech equipment allowing BIFI to produce biologics. Biotech equipment systems include Blood-Gas Analyzers, Cell Counters, Tilter Integrity Testers. Internal certifications are given to employees who complete training on each system and achieve competency.
Continuous Improvement: Training will be offered to all occupations in compliance and quality performance. BIFI wants to make significant improvements to quality including areas of field action, management controls, process validations, team skills, complaint management, and decision-making systems. Supervisors and Managers will be provided with leadership and coaching skills.

PL- Manufacturing Skills

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

Training will be offered to Production Staff, Engineers and Supervisors who interface with new or improved manufacturing processes. The proposed PL training will offer cross-training opportunities on production lines and procedures used throughout the manufacturing facility. BIFI is using PL training to deliver critical manufacturing skills to its frontline manufacturing workers.

Each trainee will receive approximately 132 PL hours with a trainer-to-trainee ratio of 1:1. BIFI must demonstrate compliance with Good Manufacturing Practices (GMPs) to the satisfaction of the FDA, European Commission and health agencies in other countries for the commercial production of biologics. To sustain GMP status, BIFI is subject to periodic inspections confirming compliance with applicable law and must pass inspection before drug protection and sales.

Impact/Outcome

Trainees will receive certifications in: primary and secondary packaging equipment, electrophoresis equipment packaging, photophoresis DNA Analysis, Pipette Carousel Stands, Structure Quality Control Biochemistry, Operation and Maintenance of VITEK 2, Glassware Wash Process, Swab Sampling, HVAC Sampling, Single Use Bioreactor, Tubing Welder, SciLog, Aseptic Aliquoting, Freezing of Microorganisms, Bioburden Testing, Endotoxin, Validation of Microbial Recovery, Buffer Preparation, Processing of Samples for Microbial Identification and others depending on work-order conditions. Employees with these certifications achieve biotech-manufacturing skills that are transferable to other biopharmaceutical employers.

Commitment to Training

The Company's statewide training budget is approximately $750,000 per facility. Training includes OSHA and FDA-mandated safety regulations, sexual harassment prevention, basic-job skills, desktop training in MS Office, and executive development training programs. BIFI will continue to fund such training, and it will fund any training hours delivered beyond the 200 total hour cap.

Training Infrastructure

The Quality Systems department will oversee all project administration. This internal-corporate training department will administer the ETP program and work directly with a third-party administrator, Herrera & Company. The Specialist, Quality Systems Training will be the dedicated administrator and will have two employees assigned to this project to work with its third-party administrator and with ETP. Training will be provided by in-house experts and vendors as needed.

Electronic Record Keeping

The LMS has been reviewed and approved by ETP staff.
RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by BIFI 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>ET17-0232</td>
<td>$374,640</td>
<td>10/3/16 – 10/2/18</td>
<td>410</td>
<td>509</td>
<td>507</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 18,508 reimbursable hours have been tracked for potential earnings of $351,306 (94% of approved amount). The Contractor projects final earnings of 100% based on training through May 2018.

PRIOR PROJECTS

The following table summarizes performance by BIFI 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>ET15-0142</td>
<td>Fremont</td>
<td>7/7/14 – 7/6/16</td>
<td>$249,388</td>
<td>$249,388 (100%)</td>
</tr>
<tr>
<td>*ET12-0407</td>
<td>Fremont</td>
<td>6/30/12 – 6/29/14</td>
<td>$442,656</td>
<td>$248,794 (56%)</td>
</tr>
</tbody>
</table>

*ET12-0407: As a first-time ETP contractor, BIFI struggled with ETP recordkeeping requirements and the start of training was initially delayed. The Contractor eventually hired an experienced ETP subcontractor to help them with administration tasks and get the project on track. However, due to the delay in start of training and lack of sufficient recordkeeping, many of the trainees did not meet the minimum 24 hours of training requirement. Many of the training hours delivered were ineligible and earnings and performance suffered.

DEVELOPMENT SERVICES

Herrera & Company in Stockton assisted with development for a flat fee of $8,750.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab/E-Learning Hours
8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Project Management
- Master Scheduling Presentation
- Product Knowledge and Market Validation
- Finance and Accounting Skills
- Marketing Promotion and Position

**COMPUTER SKILLS**
- Management and Manufacturing Control Systems
- Materials and Logistics Software Development
- Advanced Desktop Applications
- Programming Languages
- Project Management Software Tools
- Operating System Programming Language

**CONTINUOUS IMPROVEMENT**
- Process Modeling and Analysis
- Good Laboratory Practices
- GxP Compliance Training
- Quality Fundamentals/Core Skills
- Leadership/Coaching Skills:
  - Facilitating Groups
  - Efficiency Workflow
  - Facilitation Skills and Mentorship
  - Strategic Sales Negotiation Techniques

**MANUFACTURING SKILLS**
- Production and Equipment Operations
- Manufacturing Process Cross-Training
- Machine Operations, Calibration and Maintenance
- Bioreactors Practice and Theory
- Downstream Processing Steps for High Productivity
- Development of Drug Products for Clinical Studies Research
- Good Manufacturing Practices
- Regulatory Requirements Challenges
- Production of Research Drug Products
- Innovating Manufacturing Technologies
- Drug Product Development Components
- Advanced Process Modeling and Analysis
- Advanced Good Laboratory Practices
- Advanced GxP Compliance Training
- Advanced Cell Data Modeling and Architecture
- Advanced Programming Development Applications
- Equipment Operation/SafeStart
- Lean Manufacturing Techniques
- Proper Handling of Hazardous Substances

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

**Productive Lab Hours**

0-132

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

- Dial Thermometer/Temperature
- Dissolved Oxygen Transmitters
- Force Indicators
- Gas Detectors and Analyzers
- Gas Flow Indicators/Transmitters
- Humidity Indicators/Transmitters
- I/P or E/P Transducers
- Industrial Field Timing Devices
- Laboratory Centrifuges
- Level Indicators/Transmitters
- Level Switches
- Shakers and Stir Plates
- Spectrophotometers/Plate Readers
- Speed Indicator/Transmitters
- Stroke Adjusters
- Temperature Indicators/Transmitters
- Temperature Sensors
- Transducers
- UV Optical Analyzers/Transmitters
- Pressure of Weight Indicators/Transmitters
- Media Filter Cart CIP
- AFR Operation Glassware Wash Process at Building 4
- AKTA Ready of the Magna Mike 8500 Gauge
- Bioreactor Additions Cabinet Usage
- Bioreactor to Bioreactor Line CIP
- Bioreactor Transfer
- Clarifying Filter QC Biochemistry
- Counting - Cart CIP and Operations
- Culture AAA QC Chemistry
- Determination of - QC Chemistry
- Identification of Airborne Viable Particulates
- Determination of Non-Viable Particulate Levels
- Endotoxin Testing QC Chemistry
- Fixed Rosemount Cart Operation
- Fixed Tanks-Media pH Transmitter and pH Probe
- Freezing of Magnetic Mixer

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:

Dome Construction Corporation

Agreement Number: ET19-0181

Panel Meeting of: July 27, 2018

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

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraineepriority rate</th>
<th>Industry Sector(s):</th>
<th>Construction Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Retraineepriority rate</td>
<td></td>
<td>Priority Industry: ☒ Yes  ☐ No</td>
</tr>
<tr>
<td></td>
<td>SET</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Job Creation Initiative</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Industry Sector(s):</td>
<td>Construction Services</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Priority Industry: ☒ Yes  ☐ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat Contractor:</td>
<td>☐ Yes  ☒ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>☒ Yes  ☐ No Laboreres Training and Retraining Trust Fund for Northern California and 46 Northern California Counties Conference Board</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Employees in:</td>
<td>CA: 289  U.S.:289  Worldwide: 289</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>3%</td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>☒ Yes  ☐ No Laboreres Training and Retraining Trust Fund for Northern California and 46 Northern California Counties Conference Board</td>
</tr>
<tr>
<td>(% of total trainees)</td>
<td>N/A</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>$241,800</td>
<td>$0</td>
<td>$0</td>
<td>$241,800</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required  $514,100
## 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 Priority</td>
<td>Commercial Skills, Business Skills, Computer Skills, Continuous Impr, OSHA 10/30, HAZWOPER, PL-Comm Skills</td>
<td>120</td>
<td>8-200</td>
<td>0-12</td>
<td>$1,690</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 65</td>
</tr>
<tr>
<td>2</td>
<td>Retraine SET Priority Job Creation</td>
<td>Commercial Skills, Business Skills, Computer Skills, Continuous Impr, OSHA 10/30, HAZWOPER, PL-Comm Skills</td>
<td>20</td>
<td>8-200</td>
<td>0-12</td>
<td>$1,950</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 75</td>
</tr>
</tbody>
</table>

### Minimum Wage by County:
Job Number 1: $22.77 per hour Statewide. Job Number 2: $15.18 for San Francisco, San Mateo, Alameda and Santa Clara Counties; $13.66 for Ventura County.

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

### Used to meet the Post-Retention Wage?:
☐ Yes ☑ No ☐ Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

## Wage Range by Occupation

<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>*Carpenter</td>
<td></td>
<td>20</td>
</tr>
<tr>
<td>Estimator</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>*Foreman</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Mechanical Electrical Plumbing Specialist</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Project Engineer</td>
<td></td>
<td>40</td>
</tr>
<tr>
<td>Project Coordinator</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Project Manager</td>
<td></td>
<td>23</td>
</tr>
<tr>
<td>*Superintendent</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Engineer</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Project Coordinator</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>*Carpenter</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Estimator</td>
<td></td>
<td>3</td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1969 and headquartered in South San Francisco, Dome Construction Corporation (Dome) (http://www.domebuilds.com) provides construction management services including pre-construction, construction, energy optimization, equipment installation, seismic bracing and more. Dome’s customers span commercial health care, industrial plants, educational facilities, and high technology industries. This is the Company’s first ETP funding proposal and training is planned for five sites in northern California (South San Francisco, Emeryville, San Francisco, San Jose, Thousand Oaks).

Union Support

Union letters of support are on file from Laborers Training and Retraining Trust Fund for Northern California and Carpenters 46 Northern California Counties Conference Board.

PROJECT DETAILS

Training will meet the following company objectives:

- Upgrade frontline worker skills to remain competitive in a rapidly expanding construction boom. New projects require skills upgrades and new equipment and safety certifications due to changing technologies in the construction field. Training is needed in Virtual Plan Rooms, Project Management, and BIM technology. The Company will also train employees on Lean processes, new technology, and new equipment to improve productivity and reduce skill gaps among employees.
- Succession planning and growth requires the hire and training of mid and entry-level employees. Employees nearing retirement have many years of experience and invaluable skills that need to be shared. New employees generally lack sufficient experience to work independently. Training will address workforce skill gaps.
- Increase OSHA certified employees within the newly hired workforce (20 new OSHA certifications).

Upgrading employee skills will help Dome remain competitive, increase the quality and diversity of service, and improve safety at job sites.

Job Creation

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

Dome is expanding business capacity by hiring 20 new employees. The Company recently opened two new locations (San Francisco in 2015 and Emeryville in 2017) to support Bay Area construction projects. The Company has experienced a 10% increase in client projects and an estimated 25% increase in revenue. The Company will be hiring new employees (Job Number 2) at its five facilities over the next 21 months. Dome represents it has ample space to
accommodate new employees. 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 delivered via Classroom/Laboratory, e-learning, Computer-Based Training, and Productive Lab. Training will begin upon approval.

**Business Skills:** Training will be offered to Project Managers, Project Engineers, Estimators, Foremen, and Carpenters to improve construction accounting skills and increase customer satisfaction. The proposed training also aims to support career advancement, including retention of women in trades, and meet succession planning goals. Training will include topics such as Construction Accounting & Fee Projection, Business Acumen, Last Planner System, and National Association of Women in Construction Training.

**Commercial Skills:** Training will be offered to Project Coordinators, Carpenters, Mechanical Electrical Plumbing (MEP) Specialist, Project Engineer, Project Manager, and Estimator positions. Topics include Blueprint Reading, Drywall Systems, Electrical, and Project Management Training. Dome will offer some training across occupations to build functional trade teams. Goals include increasing trade skills to reduce skill gaps and to improve productivity.

**Computer Skills:** Training will be offered to Project Managers, Project Engineers, Estimators, Foremen, and Carpenters. Technology is an emerging best practice in construction that eliminates costly manual processes and allows teams to manage projects in real time and virtual planning. Training will increase technology skills, improve productivity and quality, and reduce claims and change orders. Training will include GCPay, Procore, and Viewpoint construction software solutions and modules.

**Continuous Improvement:** Training will be offered to Carpenters, Estimators, Foreman, MEP Specialists, Project Engineers, Project Coordinators, Project Managers, Superintendent, and Carpenter. Trainees will receive quality improvement initiatives and Lean implementation to improve project timelines and budget and job costing efficiency to better meet project goals. Topics such as Fundamental Cost Control, Subcontract Writing Best Practice, LEAN Construction, and Project Rhythm will be delivered.

Foreman and Superintendent will also receive training to improve leadership skills and transitions from field employees to leads. Training will include Bud to Boss, LEAD (for leaders), and Same Side Selling.

**Certified Safety Training:** Training will be offered to Carpenters, Foreman and Superintendents.

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. Dome represents that trainees will not receive 40 hours unless they work full time onsite at the clean-up location.

**Computer-Based Training**

Dome is committed to workplace safety and uses Computer-Based Training (CBT) to compliment Classroom OSHA training. Therefore, some OSHA topics will be available via Computer-Based Training. The OSHA Certified Program offered by the vendor, Click Safety via www.clicksafety.com, is an OSHA approved vendor.

**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.

Dome estimates that 48 employees will receive up to 40 hours of PL training in Commercial Skills topics for Carpenters, Project Coordinators, MEP Specialists, Project Engineers, Project Manager, and Estimators. Newly-hired staff will receive the most hours. An experienced trainer will specify scope of work, explain processes and needed equipment, verify trainee understanding of standards and specifications. Trainers will observe employees performing tasks, provide feedback, assist with re-work as necessary, and ensure employees understand processes and reach competency. The Company is requesting a 1:3 trainer-to-trainee ratio because processes are commonly performed in teams of three.

**Commitment to Training**

Dome’s annual training budget for the five facilities is $320,000. Dome’s existing structured training covers new-hire orientation, state and federally required training, Defensive Driver, First Aid, Accounting continuing education, and on-the-job training, all of which will continue to be provided at the Company’s expense.

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**

  Dome has dedicated three internal Administrators and ten in-house trainers to oversee training. The Company also retained an experienced subcontractor, Economic Incentives Advisory Group (EIAG) to assist with administration. Training is scheduled to be delivered in-house with some customized training provided by California-based vendors.

**Green/Clean Operations**

Dome meets Leadership in Energy and Environmental Design (LEED) standards on some projects. LEED is an internationally recognized green building certification system, providing third-party verification that a building or community was designed with energy savings, water efficiency, CO2 emissions reduction, improved indoor environmental quality, and sensitivity to construction impacts.
Overall, Dome’s Energy Optimization services aim to reduce energy use and costs for facilities. Solar panels, HVAC upgrades, lighting controls, mechanical equipment installation, windows, skylights and facilitating rebate programs for clients are among the Green related options provided by Dome.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Dome retained Economic Incentives Advisory Group in Phoenix, AZ to assist with development of this proposal for a flat fee of $12,500.

ADMINISTRATIVE SERVICES

Dome also retained Economic Incentives Advisory Group to perform administrative services in connection with this proposal for a not to exceed 11% of payment earned.

TRAINING VENDORS

Haley and Aldrich of Oakland has been retained to provide Lean training for a fee of $6,145.

Clicksafety of Walnut Creek has been retained to provide OSHA training for a fee of $8,500.

Other trainers will be identified as retained by Dome.
Exhibit B: Menu Curriculum

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

**BUSINESS SKILLS**
- Construction Accounting & Fee Projection
- Business Acumen
- Last Planner System
- National Association of Women in Construction Training

**COMMERCIAL SKILLS**
- Blueprint Reading
- Drywall Systems
- HVAC Fundamentals
- Polished Concrete & Epoxy
- Scanning
- Electrical

**COMPUTER SKILLS**
- Procore Software
  - General Navigation
  - Request for Information (RFI)
  - Submittal
- Viewpoint Software
  - Add-Ons
  - Client Pay Applications
  - Projects: Setting up Project
  - Contracts: Explanation of
  - Final Cost Study
  - General Navigation
  - Insurance
  - PM Contracts: How to Set Up a Schedule of Values (SOV)
  - Subcontract Issuance
  - Subcontracts & Compliance
  - Change Orders (COs)
  - Purchase Orders
- Project Phase Codes
- DocuSign
- GCPay Software
  - Insurance
  - Subcontracts & Compliance
- Lien Releases (Sub & Supplier)
- Project Management Budget Status Report
- Box & Box Sync
- DocuSign
- Outlook
- Skype
- Bid Management - Building Connected
- Comdata (Phone App)
- Keystyle
CONTINUOUS IMPROVEMENT
- Peer Review Alignment Topics
- Fundamental Cost Control / Budget Understanding
- Subcontract Writing (Best Practice around Scope)
- LEAN
- Project Lifecycle Overview
- Same Side Selling
- Leadership Training
- LEAN (for Leaders)
- Project Rhythm
- Bud to Boss

PL Hours
0 – 40

COMMERCIAL SKILLS (1:3 Trainer to Trainee Ratio)
- Carpentry Skill Development
- Drywall Systems
- Field Execution Plans and Punchlists
- HVAC Fundamentals
- Polished Concrete & Epoxy
- Project Management Training

CBT Hours
0 – 12

COMMERCIAL SKILLS
- G2 Introduction to Globally Harmonized System 4 Hours
- Gradall Training 5 Hours
- Asbestos Awareness in Construction 1 Hour
- Welding .58 Hours
- CAL Concrete and Masonry 1 Hour

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
June 27, 2018

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

Re: Union Support for ETP Funding  
Dome Construction

Dear Mr. Knox,

This letter is to confirm support by the Laborers Training and Retraining Trust Fund for Northern California for Dome Construction proposed training to be submitted to Employment Training Panel.

Sincerely,

Leonard Gonzales  
Executive Director
June 26, 2018

Michelle Austin  
Dome Construction  
393 East Grand Ave.  
South San Francisco, CA 94080  

RE: Employment Training Panel (ETP) Funding

Dear Ms. Austin:

I am writing to you in reference to Dome Construction’s request for support of the Employment Training Panel Program, State funded by the California Labor and Workforce Development that Dome Construction wants to administer in their facility.

Please be advised that the Carpenters 46 Northern California Counties Conference Board is in full support of such request based on the understanding and assurance that affected employees will be compensated as per the collective bargaining agreement.

Should you have any questions regarding this matter, please feel free to contact this office.

Sincerely,

William Feyling  
Executive Director  
WF:tc
RETRAINEE - JOB CREATION

Training Proposal for:

G & C Auto Body, Inc.

Agreement Number: ET19-0183

Panel Meeting of: July 27, 2018

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

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>SET Retrainee</td>
<td>Services</td>
</tr>
<tr>
<td>Job Creation Initiative</td>
<td></td>
</tr>
<tr>
<td>Veterans</td>
<td>Priority Industry: ☐ Yes ☒ No</td>
</tr>
<tr>
<td>HUA</td>
<td></td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA: 234</td>
</tr>
<tr>
<td>U.S.: 234</td>
</tr>
<tr>
<td>Worldwide: 234</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
</tr>
</thead>
<tbody>
<tr>
<td>11%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(% of total trainees)</td>
</tr>
<tr>
<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>$249,636</td>
<td>$0</td>
<td>$0</td>
<td>$249,636</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $428,500
## 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>Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Hazardous Materials, PL-Commercial Skills</td>
<td>99</td>
<td>8-200</td>
<td>$1,610</td>
<td>$30.36</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 70</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Job Creation SET</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Hazardous Materials, PL-Commercial Skills</td>
<td>18</td>
<td>8-200</td>
<td>$2,262</td>
<td>$13.66</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 87</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Retrainee SET HUA</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Hazardous Materials, PL-Commercial Skills</td>
<td>26</td>
<td>8-200</td>
<td>$1,380</td>
<td>$12.53</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 60</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Retrainee SET VET Job Creation</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Hazardous Materials, PL-Commercial Skills</td>
<td>7</td>
<td>8-200</td>
<td>$1,950</td>
<td>$13.66</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 75</td>
<td></td>
</tr>
</tbody>
</table>

### Minimum Wage by County:
- Job Number 1 (SET): $30.36 Statewide
- Job Number 2 (SET Job Creation): $13.66 Mendocino and Solano Counties
- Job Number 3 (SET HUA): $12.53 per hour in Mendocino and Solano Counties
- Job Number 4 (SET Job Creation Veterans): $13.66 Sonoma 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 $2.49 per hour of the company paid portion may be used to meet the Post-Retention Wage for Job Numbers 1 and 3 (provided minimum wage is met first). Up to $.97 per hour of the company paid portion may be used to meet the Post-Retention Wage for Job Number 2. Up to $.66 per hour of the company paid portion may be used to meet the Post-Retention Wage for Job Number 4.

## 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>Technicians</td>
<td></td>
<td>64</td>
</tr>
<tr>
<td>Estimators</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>Parts Staff</td>
<td></td>
<td>5</td>
</tr>
</tbody>
</table>
## INTRODUCTION

G & C Auto Body, Inc (G & C) ([www.gandcautobody.com](http://www.gandcautobody.com)) was established in 1972 and has 13 locations in Northern California all of which will participate in ETP-funded training (Fairfield, Larkfield, Novato, Petaluma, Rohnert Park, San Raphael, Santa Rosa, Sonoma, Ukiah, Vacaville, Vallejo, Windsor, Benecia). G & C provides automotive repair services and sells parts and accessories to California consumers, and national insurers such as Geico and State Farm. This is G & C’s first ETP agreement.

## PROJECT DETAILS

The automotive collision repair industry has been experiencing changes to processes and materials as new vehicles must meet Corporate Average Fuel Economy (CAFE) standards. CAFE standards require a much higher level of fuel economy for vehicles and vehicle weight is a significant factor. To meet these standards, manufacturers are reducing the weight of new vehicles by incorporating materials such as aluminum, ultra-high-strength steels, borons and composites. These new materials and methods of vehicle construction require different methods of repair. Alternative fuel, hybrid technology, and electric vehicles also require different repair methods.

<table>
<thead>
<tr>
<th>Job Number 2</th>
<th>Team Leads</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Production Staff</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>Administrative Staff</td>
<td>7</td>
</tr>
<tr>
<td>Technicians</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Estimators</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Parts Staff</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Production Staff</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Number 3</th>
<th>Team Leads</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Production Staff</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Administrative Staff</td>
<td>2</td>
</tr>
<tr>
<td>Technicians</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Estimators</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Parts Staff</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Number 4</th>
<th>Team Leads</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Production Staff</td>
<td>1</td>
</tr>
<tr>
<td>Technicians</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Estimators</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Parts Staff</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

All Technicians and Estimators wages report commissions to EDD in base wages reflected to meet ETP’s minimum wage requirements.
methods. Employees must be trained to handle repairs, provide accurate estimates, properly assess damage, and respond to customer inquiries with up to date information.

This proposal will focus on meeting the following company objectives:

- Upgrade recent auto-repair graduate skills on specialty equipment used in shops. Company growth and succession planning require hiring and training new employees as employees retire. The aging experienced population soon entering retirement is a reportedly growing industry wide phenomenon.
- Train employees on recently purchased software equipment (Post-Collision diagnostic equipment). Training in software systems and quality improvements is necessary to ensure consistency and timely reporting to insurance companies and to improve customer service.
- Upgrading worker skills will help G & C remain competitive and increase the quality and safety of repairs. The Company will be investing in new tools and equipment totaling over $780K to keep pace with rapid industry changes. Additionally, industry specific training, Inter-Industry Conference on Auto Collision Repair (ICAR) and Automotive Service Excellence, is a requirement by insurance companies.

Job Creation

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

G & C will be expanding business capacity by hiring new employees. The Company will be hiring 25 net new employees (18 in Job Number 2 and 7 in Job Number 4 (Veterans)) across occupations at two facilities (Mendocino and Solano County) to accommodate company growth during the term of the agreement. 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

G & C training will be delivered via Classroom/Laboratory and Productive Lab. Training will begin upon Panel approval.

Business Skills: Training will be delivered to Administrative Staff, Estimators, Production Staff, Parts Staff and Team Leads to improve customer experience and sales via improved customer relations, sales closing processes, negotiating and conflict management skills. Team Leads will be trained in business acumen and strategy. G & C aims to create a learning culture that supports continued business growth and plans to maintain a customer satisfaction index (CSI) scoring of greater than 98%. Needs assessments performed found deficiencies that will be addressed in training topics including; Customer Care, Negotiation Skills, Communication Skills.

Commercial Skills: Training will be offered to Estimators and Teams Leads. With changing manufacturing methods, rapid technological advances in structural materials, and on-board computers and smart vehicle systems, the need for training has increased. Training will upgrade skills on aluminum repair, structural steel repair, new frame repair and measuring equipment.

Computer Skills: Training will be offered to Estimators, Team Leads, Parts Staff, Production Staff, and Administrative Staff to allow a more knowledgeable and efficient use of software used in the automotive repair business. Technicians, Estimators and Team Leads will be trained on scanning, calibration and diagnostics software, Mitchell Mechanical, and other software interfaces. Training is essential for proper use of new technology in the diagnosis and repair of
vehicles. The technology is also helpful in the post repair screening of vehicles to properly assess the safety of the repaired vehicle before a vehicle is released to customers.

**Continuous Improvement:** All employees will be trained in Continuous Improvement topics. Topics such as Process and Quality Improvement and Lean Concepts will be delivered in an effort to create more efficient and more profitable operations. The expected outcome would be observable improvements in cycle time as a result of the delivered training topics.

**Certified Safety Training**

**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, Estimators and Technicians will receive up to 24 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, the certification entity has not yet been determined.

**Productive Laboratory**

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

Up to 40 hours of PL training in Commercial Skills will be delivered to 75 Estimators and Technicians. Newly-hired staff will receive the most hours. An experienced trainer will specify the scope of work, explain processes, demonstrate equipment, and verify that the trainees understand standards and specifications. The trainer will observe the employee perform the task, provide feedback, assist with re-work if necessary, and ensure employees are competent.

The Company requests a 1:3 trainer-to-trainee ratio due to the high cost associate with the training and the teamwork approach taken on some of the tasks being trained. Some tasks require three technicians to install auto parts or disassemble cars.

**Commitment to Training**

G & C’s annual training budget is $780,000 for its 13 California facilities. The Company regularly offers over 600 hours of training per technician per year. G & C’s existing structured training covers new-hire orientation, basic computer skills, and on-the-job training, all of which will continue to be provided at the Company’s expense. ETP funds will supplement company provided training, not displacing that which is part of the Company’s training culture.

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

- **Training Infrastructure**

  G & C has 13 dedicated internal Administrators (one per location) and 26 in-house trainers (2 per location). The Company has retained an experienced subcontractor, Synergy Management Consultants, to assist with administration. Training is scheduled to be delivered
in-house with some customized training provided by California-based vendors. A detailed training schedule is in place, and training will commence upon Panel Approval.

Veterans Program

G & C has identified veterans to be trained (Sonoma County) who have served on active full-time duty in the Armed Forces (Job Number 4). The Company actively works with organizations and job placement firms that seek to match veterans with its employment opportunities. The Company also participates in veteran-focused job fairs and online recruiting events.

High Unemployment Area

Twenty-six trainees (Job Number 3) work in Mendocino and Solano Counties, High Unemployment Areas (HUA) with unemployment exceeding the state average by at least 25%. The Company’s locations in Mendocino (Ukiah only) and Solano (Vallejo only) qualify for HUA status under these standards.

Wage Modification

For these trainees, the Panel may modify the ETP Minimum Wage. G & C seeks a modification to reduce SET wages for Job Number 3 retrainees.

➢ Retention Modification

The Panel may also modify the retention period for these trainees, making it 90 days out of 272 consecutive days with up to three employers. G & C seeks a retention modification for Job Number 3 retrainees.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

G&C retained Synergy Management Consultants in Grass Valley to assist with development of this proposal for a flat fee of $19,800.

ADMINISTRATIVE SERVICES

G&C also retained Synergy Management Consultants to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

ICAR of San Pablo has been retained to provide Commercial Skills training for a fee of $48,500. Other trainers will be identified for ETP record-keeping purposes, as they are retained by G & C.
Exhibit B: Menu Curriculum

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

BUSINESS SKILLS
- Customer Care Skills
  - Customer Retention
  - Customer Engagement
  - Customer Relationship Building
- Advanced Sales & Marketing Skills
  - Closing Sales
  - DRP Management
  - Advanced Closing Techniques
  - Sales Procedures & Strategies
- Negotiation Skills
- Conflict Resolution
- Communication Skills
- Presentation Skills

COMMERCIAL SKILLS
- I-CAR Collision Repair Certification Skills
- Refinishing Skills
  - Surface Preparation
  - Vehicle Priming/Sealing
  - Paint Spray Guns Maintenance & Set-up
  - Corrosion Protection Process
  - Sand, Buff & Detail
  - Color Theory & Tints
  - Blending Techniques
  - New Technologies
- Structural Repair
  - Unibody Alignment
  - Three-Dimensional Measuring
  - Repair & Replacement of Outer Body Panels
  - High Strength Steels
  - Aluminum Repair Processes
  - MIG Welding
  - Aluminum Welding
  - Straightening Structural Damage
  - Glass Replacement
  - Pillars, Rocker Panels, Rails, Front Structures & Floor Pan Replacement
  - Heating Cooling and AC Systems
  - Steering & Suspension Systems
  - Advanced Vehicle Systems
  - Composite Materials and Bonding Techniques
- Non-Structural Vehicle Repair Skills
  - Remove & Install Trim & Hardware
  - Adhesive Bonding
  - Diagnose Wind Noise & Water Leaks
  - Aluminum Cosmetic Damage
- Spot Welding
- Composite repair

Estimating Skills
- Steering & Suspension System Damage Analysis
- Damage on Non-Drivable Vehicles
- Electrical/Mechanical Systems
- Stationary Glass
- Advanced Materials
- Advanced Vehicle Systems
- Repair Planning, Supplemental Damage Assessment

Vehicle Operation, Maintenance, & Troubleshooting
Alternative Fuel & Hybrid Vehicle Repair Diagnostics
Service Procedures & Scheduling
Product Knowledge
OEM (Original Equipment Manufacturer) Knowledge/Skills
Pre-Post Scanning/Computer Recalibration

COMPUTER SKILLS
- CCCOne Software
  - Job Costing
  - Production Flow
  - Production Planning - ETA Times & Dates
  - Internal & External Customer Communication
  - Parts Check-In and Posting
- Mitchell & Mitchell Repair Center Software
- CCC Info Systems Software
- Alldata Software
- Microsoft Office Suite- Intermediate and Advanced
- Quickbooks
- Operations Software

CONTINUOUS IMPROVEMENT SKILLS
- Leadership Skills
- Teambuilding
- Root Cause Analysis
- Lean Concepts
- Process/Quality Improvement
- Problem Solving/Decision Making Skills
- Inventory Control
- Standard Operating Procedures
- Process Design

HAZARDOUS MATERIALS HANDLING (5%)
- Completing Material Safety Data Sheets (MSDS)
- Volatile Organic Compound (VOC) Tracking
- Emergency Clean-Up
  - Registration, Evaluation, Authorization & Restriction of Chemical Substances
  - Safety
PL Hours
0 – 40

COMMERCIAL SKILLS (PL) (limited ratio 1:3)
- 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 Collision Estimating/ Repair Planning
- Direct Repair Collision Estimating
- Pre-Post Scan

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
George Chiala Farms, Inc.
Agreement Number: ET19-0182

Panel Meeting of: July 27, 2018
ETP Regional Office: San Francisco Bay Area    Analyst: S. Wang

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Priority Rate Retrainee HUA</th>
<th>Industry Sector(s):</th>
<th>Agriculture</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Santa Clara and San Benito</th>
<th>Repeat Contractor:</th>
<th>Yes  No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Union(s):</td>
<td>Yes  No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 357</td>
<td>U.S.: 358</td>
<td>Worldwide: 358</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>19%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

Program Costs - (Substantial Contribution) - (High Earner Reduction) = Total ETP Funding

In-Kind Contribution: 100% of Total ETP Funding Required: $400,000
## 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 Priority Rate</td>
<td>Business Skills, Cont. Improv., HAZMAT, OSHA 10/30, PL- Mfg. Skills</td>
<td>80</td>
<td>8-200</td>
<td>0-1</td>
<td>$1,430</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 55</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Priority Rate</td>
<td>Business Skills, Cont. Improv., HAZMAT, OSHA 10/30, PL- Mfg. Skills</td>
<td>177</td>
<td>8-200</td>
<td>0-1</td>
<td>$1,430</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 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 1: $18.22 in Santa Clara County, Job 2 (HUA):$12.53 in San Benito 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 $2.22 per hour may be used to meet the Post-Retention Wage for trainees in Job Number 1 in Santa Clara County.

## 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: Morgan Hill, CA</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff (Accounting/HR, Security Guard, Customer Service)</td>
<td></td>
<td>13</td>
</tr>
<tr>
<td>Managers/Supervisors</td>
<td></td>
<td>32</td>
</tr>
<tr>
<td>Operations Staff (Mechanic, Electrician, Research and Development, Quality Assurance Tech, Truck Driver, Shipping/Receiving Clerk, Irrigator, Chemist, Tractor Operator, Mill Operator)</td>
<td></td>
<td>35</td>
</tr>
<tr>
<td><strong>Job 2: HUA: Hollister, CA</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff (Accounting/HR, Security Guard, Customer Service)</td>
<td></td>
<td>23</td>
</tr>
<tr>
<td>Managers/Supervisors</td>
<td></td>
<td>19</td>
</tr>
<tr>
<td>Operations Staff (Mechanic, Forklift Operator, Palletizer, Sorters, Individually Quick Frozen (IQF) Operator, Quality Assurance Tech, Truck Driver, Shipping/Receiving Clerk,</td>
<td></td>
<td>135</td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1972 and headquartered in Morgan Hill, George Chiala Farms, Inc. (George Chiala), http://www.gcfarmsinc.com/, is a family operated agricultural business that specializes in the production of vegetables such as carrots, jalapenos, garlic, green onions, mushrooms, and bell peppers. Depending on the customer's order, prepared vegetables can be freshly peeled, diced, roasted, pureed, or sliced. Each year, the Company processes over 120 million pounds of vegetables to ship to their customers throughout the United States.

This is George Chiala’s first ETP Proposal. Training will be provided at its two locations in Morgan Hill and Hollister. The Hollister facility is an individually quick frozen (IQF) and ready-to-eat-processing facility. The corporate headquarters and ingredient facility are located in Morgan Hill.

George Chiala’s customers include: Green Giant, Nestle, and Safeway Select.

PROJECT DETAILS

George Chiala seeks ETP funds to assist with the implementation of two additional production lines to help with the production of the main crops; garlic, bell peppers, and jalapenos. The Company will install peelers, bin dumpers, and a sorting line for the peeled vegetables. In order for these two lines to run successfully, staff must learn to feed the lines, sort the vegetables into the proper processing procedure, and operate the bin dumpers. These two lines will be implemented in late 2018.

Training Plan

In addition to the training on the two processing lines, the following types of training and courses will be delivered:

Business Skills: Managers, Supervisors, and Administrative Staff will receive training in Change of Management, Document Control, Record Review, and Report Procedures to ensure all paperwork that they review is in compliance.

Continuous Improvement: Training will be offered to all operations staff in topics such as Food Defense Protection, HACCP (Hazard Analysis Critical Control Point), Quality Control, and Safe Quality Food. These trainings are in accordance to the Company’s Brand Reputation Compliance certification training in which renewal is needed every year. Training will allow for better operations workflow and process improvement for staff.

Productive Laboratory – Manufacturing Skills

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

At George Chiala, production procedures and chemicals used change every year. Changes to production procedures allow for greater efficiency, while chemical changes helps to clean and sustain natural ingredients throughout each processing line. As a result, Productive Laboratory (PL) training will be provided to all Operation Staff to ensure they are trained on various operations in the processing line. A designated subject matter expert will deliver PL training. Operations Staff will receive about 40 hours of PL training at a 1:1 trainer-to-trainee ratio.
Computer-Based Training

CBT will be provided for S.A.F.E Forklift Training. Approximately 16 trainees will receive up to 1 hour of CBT.

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 or CBT. In this proposal, Mechanics, Inventory Clerk, Receiving Clerk, Sanitation, and Technicians will receive up to 8 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 is Anterra.

Training Infrastructure

George Chiala is ready to start training upon approval. Training will be provided at the Company’s Hollister and Morgan Hill facilities by internal subject matter experts. George Chiala’s H.R. Generalist is in charge of the training project. The H.R. Generalist and two Administrative Staff will be responsible for all administrative duties, including scheduling of training. Administrative Staff will meet with ETP Staff during visits.

High Unemployment Area

One hundred seventy seven trainees (Job Number 2) work in a High Unemployment Area (HUA). This is a region with unemployment exceeding the state average by 15%. The Company’s location in San Benito County is in a HUA and is eligible for a wage modification.

However, George Chiala is not asking for a HUA wage modification.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT VENDOR

N/A

ADMINISTRATIVE VENDOR

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**
- Change of Management
- Document Control and Record Review
- Report Procedures

**CONTINUOUS IMPROVEMENT**
- Allergen Control
- Color Coding
- Food Defense Procedure
- Foreign Object Detection and Prevention
- Glass, Ceramic and Brittle Plastic Control
- Glove Procedure
- HACCP (Hazard Analysis Critical Control Point)
- High/Low Risk Practices and Procedures
- Hose Procedure
- Operation Procedures
- Parts, Tools, and Bin Cleaning Procedures
- Product Zones and Traffic Pattern
- Security Procedures
- Knife Procedure
- Quality Concepts/Control
- Wood Control

**HAZMAT**
- Hazardous Chemical Handling
- SDS Chemical Handling

**OSHA 10/30**
- Ergonomics
- Hearing Conservation
- Heat Exhaustion
- Hot Work
- Log-out/Tag-out
- Machine Guarding
- PPE
- Safe Quality Food (SQF)
- Slips, Trips, and Fall Prevention

Safety Training cannot exceed 10% of total training hours per-trainee
Productive Lab Hours (1:1)

8-40

MANUFACTURING SKILLS
- Atago Pocket PAL-1 Refractometer
- Atkins Thermometer
- Batch Sheet Procedure
- Bin Washing/Grading/Dumping Procedures
- Blanchers
- Boilers Procedure
- Bostwick Consistometer
- Calibration of Equipment
- Chlorine Check with Hydrion Sanitizer
- Color Code
- Comitrol Check
- Crisis Management Procedures
- Dicer Blade Inspection
- Dock Leveler Procedure
- Electric
- Fertilizer Operation
- Filler Operation/Inspection
- Food Defense
- Foreign Review
- Forklift Procedures
- Grinder
- HunterLab Colorimeter
- Hygiena SystemSURE Plus
- Impact Wrench
- Inspection Procedure
- Iodine Hand and Tool Rise Check
- Jetter Operation
- Kettle Operation
- Lid Sealer
- Line Washing: Product Change
- Loading/Unloading Tarping
- Lock out/Tag Out
- Material Yield Procedure
- MG 4 Quat Floor Foam Concentration
- Metal Detector
- Oakton Waterproof pH Test
- Packaging/Labeling
- Pallet Procedures
- Peracetic Acid Test
- Pressure Washer Operation
- Propane
- Raw Product Procedures
- Refrigeration Compression Procedure
- Report Procedures
- RTV Training
- Safety
- Sampling Procedure
- Sanitation
- Security Procedures
- Shipping, Purchasing, and Receiving Procedures
- Skillsaw
- Tractor Operation
- Tool Procedures
- Unscheduled/Scheduled Maintenance
- Work Order Processing

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

CBT Hours

0-1

MANUFACTURING SKILLS
- S.A.F.E Forklift (1 hr.)

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:

Ly Brothers Corporation dba Sugar Bowl Bakery

Agreement Number: ET19-0154

Panel Meeting of: July 27, 2018

ETP Regional Office: San Francisco Bay Area  Analyst: C. Hoover

PROJECT PROFILE

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

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Alameda</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></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>Managars/Supervisors: (% of total trainees)</th>
</tr>
</thead>
<tbody>
<tr>
<td>11%</td>
<td>10%</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>$253,760</td>
<td>$0</td>
<td>$0</td>
<td>$253,760</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $254,208
TRAINER 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>Computer Skills, Continuous Improvement, Manufacturing Skills</td>
<td>144</td>
<td>0</td>
<td>$1,040</td>
<td>$18.22</td>
</tr>
<tr>
<td>2</td>
<td>Retraine Priority Rate Job Creation Initiative</td>
<td>Computer Skills, Continuous Improvement, Manufacturing Skills</td>
<td>50</td>
<td>0</td>
<td>$2,080</td>
<td>$15.18</td>
</tr>
</tbody>
</table>

Minimum Wage by County: Job Number 1: $18.22 per hour for Alameda County. Job Number 2: $15.18 per hour for Alameda County.

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

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

Up to $2.50 per hour may be used to meet the Post-Retention Wage in Job Numbers 1 and 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</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production and Operations Staff</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Shift / Department Lead</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>R&amp;D / Purchasing / Buyer / Q&amp;A Staff</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Supervisor / Manager</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Job Number 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production and Operations Staff</td>
<td>50</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1984, and headquartered in Hayward, Ly Brothers Corporation dba Sugar Bowl Bakery (Ly Brothers) (www.sugarbowlbakery.com) develops quality baked goods including Madeleines, Petite Palmiers, and Petite Brownie Bites. One of the largest bakeries operating in Northern California, Ly Brothers distributes to grocers/supermarket chains (Safeway, Walmart & Krogers), warehouse clubs (Costco & Sam's Club) and food service institutions. Its products are also sold across the US with international distribution in Mexico, Australia, Korea, Japan and Taiwan.
This is Ly Brothers’ second ETP project, and second within the past five years. Ly Brothers proposes to train 144 incumbent workers and 50 newly-hired, frontline workers. Incumbent workers trained under the previous ETP Project will receive different courses in cross training on new processes, equipment and technology. The previous project focused on training for Production Staff in skills necessary to run the new equipment for its Quality Micro Inspection Lab. This proposed project will train production staff to handle the Company’s business-capacity growth and the automation of its packaging equipment.

In addition, Ly Brothers plans to deliver training on new software like TraceGaines (Quality Assurance Management) and the automated systems’ software for its packaging and warehouse. These automated systems and information-enabled machines deliver real-time performance and operating data, improving efficiency by reducing downtime. The Company plans to deliver cross training in multiple departments and across multiple production lines. Cross training will enable workers to adjust quickly to demand with greater production volume and lower product defects.

Retrainees - Job Creation

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

Ly Brothers has committed to hiring 50 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.

Due to Ly Brothers’ expanded product growth and a growing distribution into multi-national grocery chains and stores, the Company is expanding its production capabilities by making investments with three large capital expenditure (CapEx) projects. One CapEx will completely automate a new line for packaging, the second CapEx will add a new bar code scanning system to the warehouse, and the third will update 35-year old technology by adding new fryers, which is the heart of the bakery business. These investments will increase production and growth capacity.

PROJECT DETAILS

Training Plan

The following training will be delivered in Class/Lab and E-Learning:

Computer Skills: This training will be offered to all occupations in a train-the-trainer program on industry specific software and hardware, and upgrades to programs like IQity for enterprise resource planning. These software upgrades will integrate existing software systems to generate financial and operational data reports. Additionally, Microsoft Office Suite (Intermediate and Advanced) skills will be delivered.

Continuous Improvement: This training will be offered to all occupations to improve regulatory reporting, quality control, and implementing policy and procedural changes at various levels. Training is planned in decision making, leading, communication, eliminating wasteful activities and managing schedules. Additionally, management and employees being prepared for management will receive skills in coaching, leadership, problem solving, conflict resolution, and Kaizen- Lean Six Sigma, Green Belt and Black Belt.

Manufacturing Skills: This training will be offered to all occupations on the Company’s new automated packaging line, new warehouse barcode hardware/software and new production fryers. This training will also focus on accessing and generating real-time reports to include defects, downtime, and run times for Production and Operations Staff, Shift/Department Leads, Maintenance Staff and R&D/Q&A Staff. Other training will focus on plant operations, automated
Commitment to Training

ETP funds will not displace the existing financial commitment to training. The Company spends $25,000 annually per facility in California. It provides orientation, safety, required regulatory and OSHA training to staff. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

All departments are trained in accordance to OSHA/EPA regulation. Ly Brothers mandates OSHA/EPA regulatory safety training. All departments receive elective training that includes human resources’ (HR) training and new-hire orientation. Class/Lab, on-the-job training and computer-based training are the training methods used to deliver training for regulatory and HR related training. OSHA and EPA training is job-specific, but HR training is company-wide.

Training Infrastructure

Ly Brothers’ Plant Director and HR Manager will coordinate this project. An assigned Administrative Staff member will coordinate with each department to manage the roster collection. Both the HR Manager and the Administrative Staff member successfully administered the prior contract together. Additionally, Ly Brothers has hired a third-party consultant- Training Grants Intelligence, Inc. (TGII) as its administrative subcontractor.

Impact/Outcome

Some trainees will be eligible for SQF, Green Belt and Black Belt certification at the completion of training in Continuous Improvement and Manufacturing Skills.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Ly Brothers Corporation dba Sugar Bowl Bakery 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>ET16-0406</td>
<td>Hayward</td>
<td>4/4/16 – 4/3/18</td>
<td>$184,992</td>
<td>$162,995* (88%)</td>
</tr>
</tbody>
</table>

* Payment Earned is listed as Earned – In Process within ETP Online Forms as of June 21, 2018, and the Contractor projects final earnings to equal 88% of the Agreement Amount.

DEVELOPMENT SERVICES

Ly Brothers retained TGII in Suwanee, GA to assist with development of this proposal for no fee.
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

Manex of San Ramon has been retained to provide Lean Manufacturing (Continuous Improvement) training for a fee of $3,600. Other trainers will be identified for ETP record-keeping purposes, as they are retained by Ly Brothers.
Exhibit B: Menu Curriculum

Class/Lab/E-Learning Hours
8-200

Trainees may receive any of the following:

**COMPUTER SKILLS**
- Packaging Automation Software
- Warehouse Barcode Software
- TraceGaines Software (Quality Assurance Management)
- Microsoft Office Suite (Intermediate and Advanced)
- Software Skills (Data Entry/Keyboarding/Interface)
- Electronic-Data Interchange Software
- IQity (ERP Software Upgrade)
- Timekeeper Payroll System (Software Upgrade)

**CONTINUOUS IMPROVEMENT**
- Problem Solving Team
- Team Building
- Six Sigma Tools
- Lean Six Sigma- LSS (Kaizen initiatives/event)
- 5S (Kaizen- Sort, Set In Order, Shine, Standardize & Sustain)
- Team Development
- Time Management
- Decision Making
- Leadership Skills
- Coaching
- Quality Control
- Project Management
- Safety Stand Downs
- Conflict Resolution
- Annual Operation Planning (AOP)
- Train-the-Trainer Training
- Run-Right Processes (Pre-Lean Management Training)
- Communication

**MANUFACTURING SKILLS**
- Automated Packaging Equipment
  - Bagging Systems
  - Case Erectors / Case Formers
  - Palletizers
  - Case Measuring System
  - Case Labeling
  - Tray Formers
  - Stretch Wrappers
  - Clean Removal Bundling System
  - Case Sealing
  - Case Packing
  - Strapping
  - Protective Packaging Equipment
  - Cappers / Fillers
- Automated Packaging Systems
- Equipment Installation
- Equipment Overhaul
- Automated Numeric Control
- Operating Standards
- Water Activated / Gum-Tape Dispensers
- Shrink Wrap
- Hand Held and Table Mounted Equipment
- Printers / Scanners
- New Equipment Safe Operation
- Warehouse Bar Code Scanner Hardware
- Warehouse Bar Code Scanner Software
- Fryers

- Production Operations (Food Processing and Packaging)
- Cross Functionality of Equipment Operation and Troubleshooting
- Cross Training Equipment and Processes
- GMP’s (Good Manufacturing Practices)
- Quality Systems Assurance: Testing, Inspection, Lab Equipment
- Environmental Sustainability / Energy Conservation
- Operator and Maintenance-Equipment Troubleshooting
- Maintenance- Hardware / Equipment Repair
- Maintenance Equipment (Troubleshooting Diagnostics)
- Safety
- Food Safety Initiatives: Safe Quality Food (SQF), International Featured Standard (IFS), Hazard Analysis Critical Control Point (HAACP)
- Advanced Production / Operator Training (Troubleshooting and Small Maintenance of Equipment)
- Packaging Maintenance
- Equipment Operation Cross Training

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:
Pinterest, Inc.

Agreement Number: ET19-0173

Panel Meeting of: July 27, 2018

ETP Regional Office: San Francisco Bay Area  Analyst: S. Wang

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>SET Priority Rate Retraine Veterans</th>
<th>Industry Sector(s):</th>
<th>Technology/IT Technology/Other</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>San Francisco</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>Number of Employees in:</th>
<th>CA: 1,187</th>
<th>U.S.: 1,498</th>
<th>Worldwide: 1,551</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>15%</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors: (% of total trainees)</th>
<th>12%</th>
</tr>
</thead>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>$247,520 - (Substantial Contribution) $0</th>
<th>(High Earner Reduction) $0</th>
<th>Total ETP Funding $247,520</th>
</tr>
</thead>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $500,000
## 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 SET</td>
<td>Business Skills, Computer Skills</td>
<td>780</td>
<td>8-200</td>
<td>$312</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td>Priority Rate</td>
<td></td>
<td></td>
<td>0-24</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Weighted Avg: 12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>SET Veterans</td>
<td>Business Skills, Computer Skills</td>
<td>20</td>
<td>8-200</td>
<td>$208</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td>Priority Rate</td>
<td></td>
<td></td>
<td>0-24</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Weighted Avg: 8</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** SET/Priority Industry: $22.77 per hour

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

**Used to meet the Post-Retention Wage?:** □ Yes  ☑ No  ☐ Maybe
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>Engineers</td>
<td></td>
<td>150</td>
</tr>
<tr>
<td>Leads</td>
<td></td>
<td>400</td>
</tr>
<tr>
<td>Managers</td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>Sales</td>
<td></td>
<td>150</td>
</tr>
</tbody>
</table>

## INTRODUCTION

Founded in 2010 and headquartered in San Francisco, Pinterest, Inc. (Pinterest) ([https://www.pinterest.com/](https://www.pinterest.com/)) is a web and mobile application which develops its website for users to search and pin ideas based on personal interest. Pinterest is also an advertisement platform for content creators and marketers of various companies. The Company is currently making its profits through investors, but plans to go public in 2019. Pinterest provides its service globally including large companies such as Home Depot, Target and Overstock.com.

Pinterest has three locations in San Francisco, two which will participate in training.

### Veterans Program

The Panel has incentives for training veterans. Pinterest plans to train approximately 20 Veterans that it currently employs. Pinterest operates a veteran’s resource group within the Company.
PROJECT DETAILS

Pinterest seeks ETP funding to assist with its rapid business growth. The Company has grown and forecasts 30% growth within the next two years. Pinterest must develop its employee’s skillsets to meet customer demands. In addition, the Company plans to promote qualified Leads to Managers positions within the next two years. All workers require training in Business and Computer Skills.

Training Plan

Training will be delivered via class/lab and Computer-Based Training (CBT) in the following:

**Business Skills**: Training will be provided in Coaching, Process Improvement and Prioritization, Problem Solving and Teambuilding. Managers and Leads will receive training to develop their teams to meet the growing demands. The Sales Staff must be knowledgeable in company products to serve new and existing customers. Engineering Staff will receive training in customer technical assistance.

**Computer Skills**: Training will be provided in technical skills and Pinterest’s Engineering Language to meet the changing demands of all users. For example, Pinterest plans to upgrade the Android and iOS team as the demands on mobile app increase.

Commitment to Training

Pinterest spends approximately $541,550 on training annually in orientation for new employees, leading a team for managers, designing your life, executive coaching and sales enablement training. ETP funds will not displace the existing financial commitment to training.

- Training Infrastructure

Pinterest is ready to start training upon approval. Training will be provided at the Company’s two San Francisco facilities by in-house staff and external training vendors. The Company Representative along with two other Learning and Development (L&D) staff will manage and facilitate the ETP Contract. Staff will be designated at each facility to coordinate training.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

Udemy for Business of San Francisco will provide CBT-Business Skills for a fee of $80,000. Other trainers will be identified for ETP record-keeping purposes, as they are retained.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Effective Communication
- C-Level Conversations
- Coaching
- Customer Feedback
- Motivation
- Performance Management
- Problem-Solving
- Process Improvement & Prioritization
- Sales Strategies
- Teambuilding

**COMPUTER SKILLS**
- Core Languages used by Pinterest Engineers
- Navigation of Technical Tools used by Pinterest
- Standard Query Language

CBT Hours

0-24

**BUSINESS SKILLS**
- C-Level Conversations (4 hours)
- Customer Feedbacks (4 hours)
- Sales Strategies (4 hours)

**COMPUTER SKILLS**
- Structured Query Language (SQL) (4 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:

Sysco Central California, Inc.

Agreement Number: ET19-0159

Panel Meeting of: July 27, 2018

ETP Regional Office: Sacramento  Analyst: D. Jordan

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Job Creation Initiative</th>
<th>Veterans</th>
<th>SET</th>
<th>HUA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td>Services</td>
<td>Priority Industry: ☑ Yes ☐ No</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Stanislaus</td>
<td>Repeat Contractor: ☑ 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>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>7%</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>
</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>$443,210</td>
<td>$0</td>
<td>$0</td>
<td>$443,210</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $480,000
# 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 HUA SET</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, PL- Commercial Skills</td>
<td>295</td>
<td>8-200</td>
<td>0</td>
<td>Weighted Avg: 64</td>
</tr>
<tr>
<td>2</td>
<td>Retrainees Job Creation Initiative HUA SET</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, PL- Commercial Skills</td>
<td>5</td>
<td>8-200</td>
<td>0</td>
<td>Weighted Avg: 29</td>
</tr>
<tr>
<td>3</td>
<td>Retrainees HUA SET Veterans</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, PL- Commercial Skills</td>
<td>5</td>
<td>8-200</td>
<td>0</td>
<td>Weighted Avg: 40</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) Job Number 1 & 3: $12.53 per hour in Stanislaus County
- (SET/HUA/Job Creation) Job Number 2: $11.00 per hour in Stanislaus County.

### Health Benefits:

- ☐ Yes  ☒ No

This is employer share of cost for healthcare premiums – medical, dental, vision.

### Used to meet the Post-Retention Wage?:

- ☐ Yes  ☒ No  ☐ Maybe

## 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>20</td>
<td></td>
</tr>
<tr>
<td>Customer Service</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Leads</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Marketing Associate</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Support Staff</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Technical Staff</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Transportation Staff</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td>60</td>
<td></td>
</tr>
</tbody>
</table>

ETP 130 - Single (06/11/18)
INTRODUCTION

Founded in 1938 and located in Modesto, Sysco Central California, Inc. (Sysco Central) (www.sysco.com) warehouses, distributes, and delivers a broad range of food products, beverages, food-service equipment, and supplies to restaurants, schools, hotels, assisted-living facilities, health care institutions, government facilities, and other businesses. Food and related products include fresh and frozen meat, poultry, seafood, fruits and vegetables, canned and dry products, paper and disposable products, cleaning supplies, kitchen equipment, and medical supplies. This is Sysco Central’s fifth ETP Agreement and fourth in the last 5 years. All training will take place at Sysco Central's Modesto location.

Need For Training

Training in the prior ETP Agreement focused on implementation of new computer systems to improve processes and productivity. In this Agreement, training will focus on improving efficiency and profitability. Although some training curriculum is similar to the previous Agreement, trainees will not receive duplicate training.

The improved economy has led to challenges for Sysco Central in finding qualified workers. A decrease in the pool of Transportation Staff has led to creation of a career path for staff, from Warehouse Staff to Transportation Staff. Training will help increase the number of Transportation Staff. After gaining commercial licenses, new Transportation Staff will be trained on the Company’s operating procedures. Sysco Central will train current staff and hire new Transportation Staff.

Additionally, Sysco Central has identified healthy food categories as a new sales opportunity. Training includes learning the categories, how to make sales, and being able to support the sales process. Training topics include Sysco Branded Products, Innovative Food Solutions, Business Development and Customer Satisfaction. Staff will also receive training on Sysco Market Online and Sysco Desktop to teach customers to place orders, track and pay for Sysco products.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Trainees will be subject to a lower post-retention wage.
Sysco Central 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.

Sysco Central has experienced a 15% growth over the last two years. As a result, Sysco Central is upgrading its facility and expanding capacity. To accommodate growth, Sysco Central will hire Marketing Associates, Support Staff, Technical Staff, Transportation Staff, and Warehouse Staff. Hiring new staff will enable the Company to meet customer demand and satisfaction.

**Veterans Program**

The Panel has established incentives for training California veterans. Sysco Central currently employs Veterans as a part of their full-time workforce (Job Number 3). The Company plans to establish an outreach program to recruit potential Veteran Candidates.

**PROJECT DETAILS**

**Training Plan**

Sysco Central will provide between 8-200 hours of Class/Lab training and 0-60 hours of PL training. Training will be delivered by in-house trainers.

**Business Skills:** Training will be offered to all staff except Transportation Staff and Warehouse Staff. Training will focus on Business Development, Customer Satisfaction, Innovative Food Solutions, Category Management Consultative Selling, and Sysco Branded Products. Training will help staff on how to market products and support sales processes. This will result in increased sales for the Company and increased customer satisfaction.

**Commercial Skills:** Training will be offered to Transportation Staff and Warehouse Staff. Training will focus on Best Practices, Fleet Maintenance, Loading Trucks More Efficiently, and Preferred Word Methods. Training will ensure staff can layout products in trucks and improve trainee efficiency. Additionally, on time deliveries, reduced returned products, and decreasing shrinkage will be improved.

**Computer Skills:** Training will be offered to all occupations. Staff will receive training to support customers through new applications that include Sysco Market Online, MySysco Truck Program, Customer Relationship Management, and Order Management. Training will improve customer satisfaction.

**Continuous Improvement:** Training will be offered to all occupations. Training topics will include Quality Assurance, Resolving Customer Problems, Sysco Food Safety, Team Communication, Procurement Efficiency and Sysco Quality Standards. Training on these topics will improve productivity.

**Productive Laboratory – Commercial Skills**

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

Sysco Central is requesting 60 PL training hours at a 1:3 trainer-to-trainee ratio in Commercial Skills. The Company requires a higher trainer-to-trainee ratio due to limited equipment which is in constant use. It is necessary to optimize the trainer and trainee’s time when the equipment is available for training. The Company has many pieces of equipment that require specialized skills to operate. The trainer will observe the trainee and offer coaching and mentor trainees throughout the process. PL
training will be delivered to Transportation Staff and Warehouse Staff on operating procedures of various equipment such as Electric Pallet Jacks, Tractors, and Forklifts. Production is expected to decrease during training and waste will be significantly higher.

**Temporary to Permanent Hiring**

Sysco Central intends to train 5 workers (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 6 months.

Sysco Central is contracted with Staffing Network LLC which provides them with workforce members for their Modesto location. Many of the entry-level Transportation Staff and Warehouse Staff are first employed in this manner. 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.

Temp-to-Perm trainees cannot be enrolled in ETP-funded training until after they have been hired by Sysco Central 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. The Company’s annual training budget per facility is approximately $480,000 for new-hire orientations, OSHA mandated training, sexual harassment prevention, first aid, company policies, staff development, and on-the-job training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- **Training Infrastructure**

Sysco Central has a detailed training plan in place and is ready to begin training upon approval. The Company’s Administrative Coordinator and Administrative Assistant will oversee this training project. In addition, the Company has retained the services of National Training Company, Inc. to assist with administration. Training will be delivered by in-house experts, and vendors to be determined later.

**Special Employment Training**

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

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

The following table summarizes performance by Sysco Central under an active ETP Agreement:
Agreement No. | Approved Amount | Term | No. Trainees (Estimated) | No. Completed Training | No. Retained
---|---|---|---|---|---
ET17-0160 | $200,750 | 08/01/16 – 07/31/18 | 280 | 123 | 123

Based on ETP Systems, 15,808 reimbursable hours have been tracked for potential earnings of $238,306.20 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress.

**PRIOR PROJECTS**

The following table summarizes performance by Sysco Central 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>ET14-0318</td>
<td>Modesto</td>
<td>03/03/14 – 03/02/16</td>
<td>$197,325</td>
<td>$171,325</td>
<td>(87%)</td>
</tr>
<tr>
<td>ET12-0281</td>
<td>Modesto</td>
<td>02/01/12 – 01/31/14</td>
<td>$249,060</td>
<td>$177,456</td>
<td>(71%)</td>
</tr>
</tbody>
</table>

**DEVELOPMENT SERVICES**

Sysco Central retained National Training Company, Inc. in Irvine to assist with development of this proposal for a flat fee of $5,000.

**ADMINISTRATIVE SERVICES**

National Training Company, Inc. 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 hours Trainees will receive any of the following:

CONTINUOUS IMPROVEMENT

- Coaching Skills
- Problem Solving
- Procurement Efficiency
- Productivity Improvement
- Quality Assurance
- Resolving Customer Problems
- Sysco Food Safety
- Sysco Quality Standards
- Team Communication
- Warehouse Productivity

COMPUTER SKILLS

- Advanced Technology
- Computerized Inventories
- Customer Relationship Management
- Cyber Security
- Exception Orders
- MS Office (Intermediate and Advanced)
- MySysco Truck Program
- Order Management
- Relationship Management Tools
- Shrinkage Reduction
- Sysco Desktop Applications
- Sysco Market Online
- Sysco Transportation System

BUSINESS SKILLS

- Business Development
- Category Management
- Consultative Selling
- Customer Satisfaction
- Delivery Tracking
- Handheld Barcode Scanners
- Innovative Food Solutions
- Inspection Procedures
- Internet Marketing
- Interpersonal Communications
- Menu Management
- Need Satisfaction Selling
- On-time Deliveries
- Operating Procedures
- Procurement Procedures
- Product Knowledge and Sales Techniques
- Revenue Management
- Sysco Branded Products
- Traceability
- Train the Trainer

**COMMERCIAL SKILLS**

- Best Practices
- Diagnosing Electrical System Problems
- Fleet Maintenance
- Loading Trucks More Efficiently
- Preferred Work Methods

**PL Hours**

0-60 Trainees will receive any of the following:

**COMMERCIAL SKILLS (1:3 Ratio)**

- Electric Pallet Jacks
- Forklifts
- Handheld Inventory Equipment
- Order Selection Procedures
- Preferred Work Methods
- Product Handling
- Temperature Control instrumentation
- Tractors
- Trailers
- Warehouse Equipment

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

American Educational Systems, Inc. dba American College of Healthcare and Technology

Agreement Number: ET19-0179

Panel Meeting of: July 27, 2018

ETP Regional Office: North Hollywood    Analyst: M. Webb

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SET SB &lt;100</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Industry Sector(s):</th>
<th>Engineering</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Construction</td>
<td></td>
</tr>
</tbody>
</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, Orange, Riverside, San Diego, San Bernardino</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Repeat Contractor:</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Yes</th>
<th>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>Program Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>$358,000</td>
<td>$24,800</td>
<td>$382,800</td>
</tr>
</tbody>
</table>

| In-Kind Contribution: | 50% of Total ETP Funding Required | $191,460 |
**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>Computer Skills</td>
<td>80</td>
<td>8-200</td>
<td>0</td>
<td>$2,780</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 100</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee</td>
<td>Computer Skills</td>
<td>10</td>
<td>8-200</td>
<td>0</td>
<td>$2,460</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 100</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>SET Retrainee Priority Rate</td>
<td>Computer Skills</td>
<td>40</td>
<td>8-200</td>
<td>0</td>
<td>$2,780</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 100</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>SET Retrainee</td>
<td>Computer Skills</td>
<td>10</td>
<td>8-200</td>
<td>0</td>
<td>$2,460</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 100</td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** Job Numbers 1-2: $17.54 per hour for Los Angeles County; $17.50 per hour for Orange County; $17.03 per hour for San Diego County; and $16.70 per hour for Riverside and San Bernardino Counties.

Job Number 3: $22.77 per hour Statewide Average Wage (Priority Industry).

Job Number 4: $30.36 per hour 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 of up to $2.50 per hour 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 Numbers 1-4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Architect</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Architect Assistant</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>CNC Programmer</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Drafter</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>Engineer</td>
<td>31</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1993, American Educational Systems dba American College of Healthcare (ACH) (www.ach.edu) is a learning institution that specializes in health education, Computer-Aided Design (CAD), and Building Information Modeling technology (BIM). ACH is approved by the Bureau for Private Postsecondary Education to provide CAD/BIM Technology training. ACH will provide retraining in CAD and BIM software employers in the fields of engineering, architecture, construction, manufacturing, and similar industries.

Participating employers need to train employees in specific computer software programs in order to acquire work on complex projects. As a result, employers are in need of highly skilled workers with the skill sets to design, manufacture, and complete work utilizing new and advanced technologies. Specialized software used by participating employers are updated on a continuous basis and require employers to provide efficient training for staff to maintain productivity levels and meet customer demand. ACH has provided 85% of employer demand as justification to fund this proposal.

The largest group of participating employers in this project include businesses in the construction industry. Although computerized drafting and design are common, the nature of computer systems has continued to exceed prior advances in technologies. Employees require training programs for mechanical engineers, architects, and planners to increase staff skill sets and improve efficiencies.

PROJECT DETAILS

Training is designed for workers who utilize computer software programs at high levels of efficiency and production on a daily basis. Training will be provided in a formal classroom setting, as well as in a hands-on laboratory setting for the trainee to receive practice in resolving work-related problems. Many larger companies have adopted complete utilization of BIM and Autodesk Revit systems. This training proposal will focus on training for smaller companies who must also move towards implementation of these systems in order to remain competitive.

Traditional CAD systems allow occupations such as Drafters, Designers, and other professionals to replace hand drawing systems with computer-aided designs more accurate in the building process. BIM utilizes a more intelligent model-based process for design, simulation, visualization, and collaboration in commercial, industrial, and infrastructure projects. BIM is also used to model and reduce energy usage.

Information for all project phases are located in a single database that support collaborative work across disciplines and through all phases of a project, including concept development, architectural and engineering plans, cost estimating, construction planning and scheduling, and building maintenance. Training will ensure trainees are able to fully implement BIM in the design and planning phase of a project.
Training Plan

Training is customized to engineering, design, and production requirements of the manufacturing, engineering, construction, and architectural industries. CAD and related 3-D training has been specifically tailored to the requirements of these companies. Training content is selected for its relevance to the industry as it pertains to the company and its staff.

**Computer Skills**

Training will be offered to all occupations to improve employee skills and increase efficiencies for participating employers. Course topics will include computer software training in SolidWorks, Civil 3D, NaviWorks, model upgrading, renderings, and drawing automation.

Commitment to Training

Participating Employers will continue to provide on-the-job training, new hire orientation, and other company-wide training alongside 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/Coordinator

  The Chief Executive Officer, Amir Baniassad, will be in charge of this training project, and two ACH staff workers will administer the project. Staff will coordinate all aspects of the project including employer recruitment, employer certification and ETP documentation and reporting. Staff will also be assigned as needed to complete employer assessments, schedule and deliver training, and assist with marketing.

Marketing and Support Costs

Marketing for ACH is conducted via web advertisements, direct mailings, telephone, email, and in-person visits. Marketing is also conducted at exhibits held at design, engineering, and manufacturing shows, including two major shows located at the Anaheim and Los Angeles Convention Centers. ACH marketing for this project is specifically targeted at Employers and not potential trainees.

Marketing efforts are followed up to inquire potential participating employers for training provided via ACH. If a company qualifies for training, a certification statement is provided and enrollment information is completed for participation. Marketing will continue to take place over the duration of the Agreement. As a result, ACH is requesting that 8% in support costs be included in the funding amount for this proposal.

Trainer Qualifications

All training will be provided by ACH. ACH Instructors hired to deliver CAD and BIM training have extensive experience in administering and delivering training to employers and employees in engineering, architecture, and manufacturing.

Tuition Reimbursement

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.
RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

ACH retained Steve Duscha Advisories in Sacramento to assist with development of this proposal for a flat fee of $5,000.

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

COMPUTER SKILLS

Computer Aided Drafting

- 2D and 3D renderings
- Applications to work projects
- Applying parameters
- Assembly configurations
- Assembly motion modeling and animation
- Bills of material
- Calculations
- Collision/interference detection
- Creating of families of parts
- Dimensioning
- Drawing automation
- Editing
- File Management
- Project organization
- Section creation
- Types of applications
- Updating views
- View creation

Building Information Modeling

- Automation and customization
- Collaboration
- Conceptual design tools
- Construction modeling
- Creating functional designs
- Design options
- File importing and exporting
- Managing schedules
- Material estimates
- Multiple materials modeling
- Parametric components
- Phasing projects
- Principles of modeling
- Printing, model upgrading
- Rendering
- Simulations
- Structural reinforcement
- User interface
• Using bidirectional associativity to show changes throughout the model
• Vault integration
• Visualization
• Working in 3D

Civil 3D

• Create and edit alignments
• Create and edit parcels and print parcel reports
• Create assemblies, corridors and intersections
• Create data shortcuts
• Create grading solutions
• Create gravity fed and pressure pipe networks
• Create points and point groups and work with survey figures
• Create sites, profiles and cross-sections
• Create, edit, view and analyze surfaces
• Perform quantity takeoff and volume calculations
• Use plan production tools to create plan and profile sheets.
• User interface

Navisworks

• Combining 3D geometry from multiple disciplines
• Create 4D construction simulations
• Create interactive animations
• Link task-scheduling files
• Open, review, quantify and run object interference checks
• Renderings
• Review and mark up a model
• Use Animator
• Use Quantification
• Use Scripter
• Use TimeLiner

SolidWorks

• 3D finite analysis
• 3D photorealistic rendering
• Applying mechanical design to computer design
• Assembly motion modeling and animation
• Bills of material
• Collision/interface detection
• Creation of families of parts
• Dimensioning
• Drawing automation
• Drawing creation
• Generating parts
• Mass properties and calculations
• Rapid prototyping
- Section creation
- Update views
- View creation
- Visualization and rotation of designs

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): N/A</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>Gkkworks</td>
<td>2355 Mani St.</td>
<td>Irvine, CA 92614</td>
<td></td>
<td>20</td>
<td>100</td>
<td>70</td>
</tr>
<tr>
<td>Pan-Pacific Mechanical</td>
<td>18250 Euclid St.</td>
<td>Fountain Valley, CA 92708</td>
<td></td>
<td>60</td>
<td>800</td>
<td>800</td>
</tr>
<tr>
<td>Ruhnau Clarke Architects</td>
<td>3775 Tenth St.</td>
<td>Riverside, CA 92501</td>
<td></td>
<td>20</td>
<td>80</td>
<td>80</td>
</tr>
<tr>
<td>Urban Arena</td>
<td>3195 Red Hill Ave.</td>
<td>Costa Mesa, CA</td>
<td></td>
<td>20</td>
<td>40</td>
<td>40</td>
</tr>
</tbody>
</table>
Training Proposal for:

Building Skills Partnership

Agreement Number: ET19-0178

Panel Meeting of: July 27, 2018

ETP Regional Office: North Hollywood        Analyst: L. Vuong

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainee Priority Rate SET</th>
<th>Industry Sector(s):</th>
<th>Transportation/Logistics Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>Yes ☒ No □</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Los Angeles</th>
<th>Repeat Contractor:</th>
<th>Yes ☒ No □</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Yes ☒ No □ SEIU-USWW Local 1877</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>N/A</th>
</tr>
</thead>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>$1,684,800</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Costs</td>
<td>$113,400</td>
</tr>
</tbody>
</table>

8%  

<table>
<thead>
<tr>
<th>Total ETP Funding</th>
<th>$1,798,200</th>
</tr>
</thead>
</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>Retrainees Priority Rate SET</td>
<td>Business Skills, Commercial Skills</td>
<td>4,050</td>
<td>8-200</td>
<td>0</td>
<td>$444</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 16</td>
<td>$13.75</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:** $13.75 per union collective bargaining agreement.

**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 employers provide health benefits, 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>Cargo Staff</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>Janitorial Staff</td>
<td>500</td>
<td></td>
</tr>
<tr>
<td>Baggage Staff</td>
<td>500</td>
<td></td>
</tr>
<tr>
<td>Passenger Service Staff</td>
<td>1,670</td>
<td></td>
</tr>
<tr>
<td>Cabin Staff</td>
<td>980</td>
<td></td>
</tr>
<tr>
<td>Security Staff</td>
<td>200</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Building Skills Partnership (BSP) (www.buildingskills.org) is a statewide non-profit collaboration between the Service Employees International Union-United Service Workers West (SEIU-USWW) Local 1877, signatory employers, and community leaders. BSP’s mission is to improve the quality of life of low-wage workers in the building service sector, by increasing their skills and opportunities for career advancement.

BSP also strives to assist building service employers in developing staff. At present, 80 signatory employers contribute to the BSP training and education fund, as established through collective bargaining. BSP offers assistance to approximately 12,000 union janitors and service workers in California, in six regions: Los Angeles, Orange County, San Diego, San Jose, Oakland/San Francisco, and Sacramento.

In March 2016, BSP piloted and implemented an emergency response and preparedness training program at Los Angeles International Airport (LAX). The training focused on developing skills in response to a shooting incident. The incident demonstrated airport service workers are often first-responders in emergencies. As a result, many employers and workers raised concerns such as confusion about evacuation routes, rally points and accounting for co-workers. A comprehensive
training program was negotiated to address these concerns through collective bargaining between SEIU-USWW and signatory employers on behalf of some 10,000 airport service workers at LAX. These agreements required employer contributions to fund emergency response and preparedness training for these workers. In addition, a Quality Service Committee consisting of union staff, BSP and three signatory employers was formed to explore and implement ways to enhance and improve services, safety and security during emergencies and catastrophes.

PROJECT DETAILS

BSP has received high demand from participating employers wanting to increase awareness and safety training for airport service workers and travelers and to expand its LAX program. ETP funding will provide workers with the necessary skills to keep travelers safe and improve efficiencies and quality services.

Training Plan

No trainees from the prior ETP project will receive duplicate training in any subject matter under this proposal. The core group of signatory employers represents 100% of requested funding for this proposal. This will be the first training for the majority of workers. Classroom/Laboratory and Videoconference training will be provided in the following:

Business Skills: This training will be offered to all occupations. Training will improve communication, performance and customer service. Training will be focused on effective communication in emergency situations, which includes accurate and concise reporting.

Commercial Skills: This training will be offered to all occupations. Training will cover the role of airport service workers in emergency situations. Trainees will learn proper evacuation procedures, observation techniques and suspicious package handling.

Commitment to Training

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

Participating employers will provide new hire orientation, informal one-on-one job skills training, and basic safety training. However, they rely on BSP to meet their training needs in Customer Service, Commercial Skills and Business Skills. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➢ Training Infrastructure

BSP has seven full-time staff members to coordinate marketing, recruitment, needs assessments, and the scheduling and tracking of training. In addition, BSP has retained an outside administrative consultant to ensure that all training records adhere to ETP requirements.

Curriculum Development

BSP worked closely with employers, airport managers, service employees, and SEIU-USWW representatives to develop the proposed Curriculum. BSP also met with local emergency personnel to customize the course material for the specific requirements of LAX. The course content has been compiled from longer training courses developed for security guards, police officers, and fire department personnel. The proposed Curriculum is specifically designed to provide emergency response training to workers who have received minimal classroom instruction on this content in the past.
Marketing and Support Costs

BSP has surveyed, interviewed, and given presentations to service employers, and other members of its Joint Labor-Management Board. BSP works closely with SEIU-USWW Local 1877, local emergency personnel and airport service employers. BSP’s relationships with these stakeholders contribute to the development of concise program objectives and play an important role in the recruitment of employers and trainees.

BSP’s marketing efforts will consist of newsletters, presentations, contacting new employees by onsite visits, and meeting with each new employer to discuss the program in detail. BSP has seven employees and four Americorps volunteers dedicated to marketing, recruitment, assessment, and scheduling training. BSP seeks 8% Support Costs to fund extensive marketing efforts and the recruitment of additional participating employers.

Special Employment Training Wage Modification

Under SET, participating employers are not required to demonstrate out-of-state competition. Trainees must earn at least the statewide average hourly wage at the end of retention. However, the Panel may accept a collective bargaining minimum wage. The post-retention wage is $13.75 per hour, consistent with the collective bargaining agreement.

Trainer Qualifications

Classes will be provided by knowledgeable BSP trainers. Outside professional experts may be used when specific technical skills are required, and unavailable in-house.

Training Coordinator

BSP has designed seven staff and four Americorps volunteers member to be responsible for project administration. BSP will also utilize a third party vendor with ETP experience to assist with administration (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 BSP 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>ET17-0469</td>
<td>$381,500</td>
<td>04/03/2017 – 04/02/2019</td>
<td>350</td>
<td>TBD</td>
<td>TBD</td>
</tr>
</tbody>
</table>

Based on ETP Online Systems, 12,212.5 reimbursable hours have been tracked for potential earnings of $195,766 (51% of approved amount). The Contractor projects final earnings of 100% based on training.
Building Skills Partnership July 27, 2018

Currently committed to by employers and in progress through 01/01/2019. This Agreement is for BSP’s traditional janitor training and related to ET15-0409 and ET13-0205.

PRIOR PROJECTS

The following table summarizes performances by BSP 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>*ET16-0397</td>
<td>Statewide</td>
<td>06/30/2016–06/26/2018</td>
<td>$58,176</td>
<td>58,176</td>
<td>(100%)</td>
</tr>
<tr>
<td>ET15-0409</td>
<td>Statewide</td>
<td>04/06/2015–04/06/2017</td>
<td>$385,975</td>
<td>$351,679</td>
<td>(91%)</td>
</tr>
<tr>
<td>ET13-0205</td>
<td>Statewide</td>
<td>12/31/2012–12/30/2014</td>
<td>$398,665</td>
<td>$320,065</td>
<td>(80%)</td>
</tr>
</tbody>
</table>

*ET16-0397 – This is BSP’s first LAX program related to emergency response and preparedness training.

DEVELOPMENT SERVICES

BSP retained California Labor Federation in Orangevale and Strategy Workplace Communication (Strategy) in Burlingame to assist with development of this proposal at no charge.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined
**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8-200  
Trainees may receive any of the following:

**BUSINESS SKILLS**
- Communication Process
- Verbal vs. Non-Verbal Communication
- 3 V’s of Communication – Verbal, Vocal and Visual
- Changing the Meaning of a Statement Through Vocals
- Miscommunication – 10 Barriers to Communicating Effective Messages
- Describing Suspicious Behaviors and Reporting Incidents

**COMMERCIAL SKILLS**

- Introduction and Overview
  - Training Overview and History
  - Defining Emergencies and Incidents
  - LAX Emergency Number and Reporting Emergencies and Incidents
  - Becoming an Active Bystander
  - As an Airport Worker, What Are Your Biggest Questions and Concerns?

- Module 1: LAX Overview and Organizational Structure
  - By the Numbers: Statistics on Air Travel and LAX
  - Agency Organizational Structure: How Business, Local and Federal Agencies Interact to Make the Airport Run?
  - Role and responsibilities of:
    - The City of Los Angeles and LAWA
    - Federal Aviation Administration (FAA)
    - Transportation Security Administration (TSA)
    - Customs and Border Protection (CBP)
  - Challenges that Come with the Unique Structure of Airports and the Target They Present

- Module 2: Federal Emergency Management Frameworks
  - What is Emergency Management?
  - What Frameworks Exist for Emergency Management and How Does LAX Employ Them?
  - The Incident Command System (ICS)
  - National Incident Management System (NIMS)
  - Standardized Emergency Management System (SEMS)
  - Role of Department Operations Center (DOC) and Airport Response Coordination Center (ARCC)
  - Explanation of Incident Commander
  - Review Hierarchy During Incidents
  - Where Do You (Certified Service Providers) Fall in the Airport Structure and What is Their Role During an Incident or Emergency?
• Module 3: Passengers with Disabilities and ADA  
  o What is a Disability?  
  o History of the Treatment of People with Disabilities  
  o Using People First Language  
  o Understanding the American with Disabilities Act (ADA)  
  o Categorizing Disabilities and Understanding Behaviors  
  o Vision  
  o Hearing  
  o Mobility  
  o Cognitive/Developmental  
  o Mental Illness  
  o Hidden Disabilities  
  o Tips for Interacting with Individuals with Disabilities  
  o No Disability is the Same or Equal - Individualized Approach

• Module 4: Evacuation and Repopulation Procedures  
  o The Difference Between a Controlled and Uncontrolled Evacuation  
  o What is Shelter in Place and Repopulation?  
  o Evacuation Procedure, Agency Roles/Responsibilities and Meeting Areas  
  o Repopulation Protocol  
  o Repopulation Order  
  o Airport and Terminal Layouts  
  o Emergency Exits  
  o Staircases  
  o AED Machine Locations  
  o How Will Your Company Account for You? – Personnel Accounting Procedures  
  o Who Do You Contact and How Will You Know There’s an Emergency?  
  o Continuity of Operations  
  o Create Your Route – Identify the Best Routes to Use in the Event of an Evacuation

• Module 5: Hazard Safety – Earthquake; Fire; Power Failure; Airplane Accident  
  o General Tips of Hazard Safety  
  o Earthquake Safety  
  o What is an Earthquake and Their Magnitude?  
  o Drop, Cover, Hold  
  o Fire Safety  
  o Fire Triangle  
  o Stop, Drop, Roll  
  o Evacuation Tips for Dense Smoke and Closed Doors  
  o What to Do If There is a Power Failure and/or Airplane Accident?

• Module 6: Active Shooter Situations  
  o Active Shooters vs. Terrorist Disruptions  
  o The Planning Stages of a Disruption – It Doesn't Happen Overnight  
  o What Do You Do If There is an Active Shooter?
- Run, Hide, Fight
- React, Escape, Survive
- Understanding the OODA Loop
- The role of Law Enforcement and First Responders
- How Do You Turn Fear Into Action? How Can You Work Together?

- Module 7: Observation Skills and Suspicious Behavior
  - What Does Observation and Behavior Mean?
  - Defining Filters (Biases and Stereotypes)
  - Focusing on Behaviors of People Not What They Look Like
  - The Triangle of Crime: Ability, Desire and Opportunity
  - Detecting Suspicious Behaviors in Order to Deter, Delay or Deny Opportunities to Commit Act.
  - Handling Suspicious Situations:
    - Hazardous Materials
    - Suspicious Articles
    - Bomb Threats

- Module 8: Creating your emergency action plan
  - 5 Step Action Kit:
    - Define your Area
    - Recruit Leaders and Participants
    - Scout the Area
    - Build your Team
    - Plan your Approach

- Module 9: Health and Safety
  - Blood Borne Pathogens
  - Heat and Cold stress illness
  - Recognizing Signs and Symptoms for:
    - Heart Attacks
    - Stroke
    - Seizures
    - Diabetic Emergencies
    - Fainting
    - Asthma
    - Allergic Reaction/Anaphylaxis

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:
First Software USA dba Oxford Institute of Technology
Agreement Number: ET19-0180

Panel Meeting of: July 27, 2018
ETP Regional Office: North Hollywood Analyst: M. Webb

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees SB&lt;100</th>
<th>Priority Rate Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td>Technology/IT</td>
<td>Technology/Other</td>
</tr>
<tr>
<td></td>
<td>Technology/Other</td>
<td>Engineering</td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>☒ Yes ☐ No</td>
<td></td>
</tr>
</tbody>
</table>

| Counties Served:     | Los Angeles, Orange, Kern, Riverside, Ventura, San Bernardino |
| Repeat Contractor:   | ☒ Yes ☐ No                                                      |
| Union(s):            | ☐ Yes ☒ No                                                     |

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

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>$348,789</th>
<th>Support Costs</th>
<th>$24,113</th>
<th>8%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total ETP Funding</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
<th>50% of Total ETP Funding Required</th>
<th>$186,451</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</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></td>
<td></td>
<td></td>
<td></td>
<td>Class / Lab</td>
<td>CBT</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Retraineer</td>
<td>Advanced Tech, Business Skills, Computer Skills, Cont. Imp.</td>
<td>220</td>
<td>8-200</td>
<td>0</td>
<td>$1,254</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 51</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraineer</td>
<td>Advanced Tech, Business Skills, Computer Skills, Cont. Imp.</td>
<td>60</td>
<td>8-200</td>
<td>0</td>
<td>$1,418</td>
</tr>
<tr>
<td></td>
<td>Priority Rate SB&lt;100</td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 51</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Retraineer</td>
<td>Advanced Tech, Business Skills, Computer Skills, Cont. Imp.</td>
<td>5</td>
<td>8-200</td>
<td>0</td>
<td>$1,254</td>
</tr>
<tr>
<td></td>
<td>SET</td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 51</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Retraineer</td>
<td>Advanced Tech, Business Skills, Computer Skills, Cont. Imp.</td>
<td>4</td>
<td>8-200</td>
<td>0</td>
<td>$1,418</td>
</tr>
<tr>
<td></td>
<td>SET Priority Rate</td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 51</td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County**: Job Numbers 1-2: $17.54 per hour for Los Angeles County; $17.50 per hour for Orange County; and $16.70 per hour for Kern, Riverside, Ventura and San Bernardino Counties.
Job Number 3 (SET): $30.36 per hour for Statewide Average Wage.
Job Number 4 (SET/Priority Industry): $22.77 per hour for 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 up to $2.50 per hour in 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 Analyst/Engineer</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Graphic Designer/Web Page Developer</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Network Administrator/Analyst</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Microsoft Office Administration/Help Desk Staff</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td>Database Administrator/Analyst</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>System Administrator/Analyst</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Software Developer/Business Analyst, Web Applications Staff</td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1999 and located in Encino, First Software USA dba Oxford Institute of Technology (OIT) is a BPPE approved private training agency that specializes in Information Technology (IT). The training agency offers a wide variety of computer related and advanced technology courses. OIT serves a multitude of industries such as aerospace, insurance, computer services, media, software development and security. This will be the Company’s third ETP Agreement, and the first in five years.

PROJECT DETAILS

California employers face competition from out-of-state and offshore sources. To remain competitive, employers seek training agencies such as OIT to provide training that will increase employee skill sets. To ensure OIT programs offer curriculum relevant to the participating employer, OIT staff has conducted employer assessments to determine employer needs and customize training plans that will improve worker skills and increase efficiencies.

Training will increase worker knowledge on new computer software programs, as well as ensure workers are up to date on new technologies. Computer Skills training will include content on Cisco networks, computer and web programming/applications, software analysis, multimedia graphic design, adobe, and windows server support and maintenance. Upon completion of training, trainees may apply and test for various Microsoft, Cisco, CompTIA and Project Management Institute certifications.

Training in Business Skills and Continuous Improvement will include curriculum topics on project management to teach workers lean techniques (six sigma) that can be implemented in the workplace to increase productivity and streamline processes.

Additional course topics include Cybersecurity and implementation of new infrastructure technologies. With the increase in internet availability and businesses continuing to migrate to cloud-based storage, breaches of personal and corporate data have unfortunately become a common event. Training provided will ensure IT staff has the skills to improve internal and external communications through computer learning.

Training Plan

Training for this project will take place Monday-Friday, four to eight hours per day at OIT or employer facilities.

Business Skills: Training will be offered to all occupations to improve workers organizational, problem solving, and communication skills. Trainees will also learn financial analysis and project management skills.

Computer Skills: Training will be offered to all occupations to increase staff knowledge and abilities to utilize computer software programs. These programs are used to design and implement new software programs and infrastructures within the workplace.

Continuous Improvement: Training will be offered to all occupations to improve project management and business processes for participating employers. Trainees will learn how to use new marketing strategies to increase sales, and implement quality measures.
Advanced Technology

Software Developers, Network/Database Administrators, and Engineers will participate in Advanced Technology training to increase employee skills in new networking technologies. Curriculum topics will include CompTIA, Cisco Networks, Database Developer Tools, and Network Routing and Switching. Advanced technology topics are taught by qualified instructors from OIT who have the knowledge and industry experience needed to provide training in this project. The trainer-to-trainee ratio for AT courses will not exceed 1:10, to allow in-depth coverage and personal attention from the instructor.

Marketing and Support Costs

OIT advertises its training programs through online avenues such as LinkedIn, Alignable, Facebook, and OIT’s company website. Other marketing efforts include catalogs, brochures, fliers, blog posts, chambers of commerce, industry associations, county and regional development agencies, and job fairs. In addition, OIT maintains contact with Employers that have utilized OIT training programs in the past to continue providing services on an as needed basis.

Marketing for the training agency will be conducted throughout the term. Thus, OIT is requesting 8% in support costs to recruit additional Employers for training under this proposal.

Special Employment Training

Under SET (Job Numbers 3 and 4), the participating employer is not required to demonstrate out-of-state competition. Trainees must earn at least the statewide average hourly wages of $30.36 per hour in Job Number 3, and $22.77 per hour in Job Number 4 at the end of the retention period.

Training Coordinator

OIT utilizes onsite instructor-led teaching methods. OIT experience has shown that employers have a higher training success rate when provided onsite by an instructor. Materials are readily available from vendors such as Cisco, Microsoft, and CompTIA. Content is customized to meet the requirements of software updates and newly released versions of their programs. Curriculum is also revised to ensure curriculum topics meet learning objectives and demographics within the class.

Commitment to Training

Participating employers will continue to provide on-the-job training alongside OIT training. Training provided at employer locations will include job-specific and company-wide training. ETP funds will not displace the existing financial commitment to training.

➢ Training Infrastructure

OIT’s Managing Director will oversee administration of this ETP Agreement. Two OIT associates have been assigned the role of administrating duties such as enrollment, scheduling training, collect and record attendance rosters, and perform data entry in ETP online systems. All training will be delivered by qualified instructors of OIT. All instructors have work experience in the IT industry, and have the expertise necessary to provide training under this Agreement.
Tuition Reimbursement

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200

Trainees may receive any of the following:

BUSINESS SKILLS
- Accounting Processes
- Business and Report Writing
- Business Problem Solving
- Business Processes
- Customer Service Skills
- Financial Analysis Skills
- Interpersonal Communication
- Marketing Strategies
- Negotiation Skills
- Organizational Skills
- Product Knowledge
- Project Management
- Sales Skills

COMPUTER SKILLS
- .NET Programming/Applications
- Adobe Software
- Advanced Desktop Applications
- Document Imaging Specialist
- Electronic Medical Records/Electronic Health Records
- HTML
- Illustrator
- Implementing and Supporting Windows
- In Design
- Information Technology Solutions
- Microsoft Access (Intermediate/Advanced)
- Microsoft Excel (Intermediate/Advanced)
- Microsoft Office (Intermediate/Advanced)
- Microsoft PowerPoint (Intermediate/Advanced)
- Microsoft SharePoint
- Microsoft Word (Intermediate/Advanced)
- Multimedia Graphics Design-Adobe/Web Page Development
- Photoshop
- Software Analysis, Design and Implementation
- Visual Basic
- Visual Studio
- Web Programming/Applications
ADVANCED TECHNOLOGY (Ratio 1:10)
- Amazon Web Service/Microsoft Azure
- Cisco Networking Specialist
- Cisco Networks
- Computer Network Administrator/A+, Network+
- Database Administrator/Oracle Specialist/MCSE SQL
- Database Developer Tools and Utilities
- Exchange
- Hacking
- Information System Technology
- IT Security Professional (CCNA/Security+/CISSP)
- Microsoft .Net MCSD Solution Developer/C# And VB
- Microsoft Win Server
- Network Developer Tools and Utilities
- Network Specialist 11 CCNP/Wan Cisco
- Network Specialist 11 MCSE/MS Windows
- Network+
- Security Systems
- SQL Server
- VMware
- VMware/Cloud/SharePoint
- Windows Server Support and Maintenance

CONTINUOUS IMPROVEMENT
- IT Infrastructure Library
- Customer Service Skills
- Interpersonal Communication
- Marketing Strategies
- Organizational Skills
- Project Management
- Project Management and Business Processes
- Project Management Applications
- Six Sigma and Six Sigma Lean

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>Bel Air Internet LLC</td>
<td>15301 Ventura Blvd., Building D, #250</td>
<td>Sherman Oaks, CA 91403</td>
<td>N/A</td>
<td>25</td>
<td>80</td>
<td>77</td>
</tr>
<tr>
<td>Dyntek, Inc.</td>
<td>5241 California Avenue, #150</td>
<td>Irvine, CA 92617</td>
<td>N/A</td>
<td>25</td>
<td>200</td>
<td>50</td>
</tr>
<tr>
<td>Ginisis Group, Inc.</td>
<td>400 Continental Blvd., Suite 6</td>
<td>El Segundo, CA 90245</td>
<td>N/A</td>
<td>14</td>
<td>16</td>
<td>16</td>
</tr>
<tr>
<td>Logistics Technology Consulting Group</td>
<td>370 Crenshaw Blvd., Suite E206</td>
<td>Torrance, CA 90503</td>
<td>N/A</td>
<td>2</td>
<td>7</td>
<td>7</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>Multacom Corporation</td>
<td>16654 Soledad Canyon Road</td>
<td>Canyon Country, CA 91387</td>
<td>N/A</td>
<td>11</td>
<td>17</td>
<td>17</td>
</tr>
<tr>
<td>Sit’ n Sleep Corporation</td>
<td>14300 S Main Street</td>
<td>Gardena, CA 90248</td>
<td>N/A</td>
<td>25</td>
<td>192</td>
<td>192</td>
</tr>
<tr>
<td>The Tech Consultants</td>
<td>21700 Oxnard Street, Suite 870</td>
<td>Woodland Hills, CA 91367</td>
<td>N/A</td>
<td>10</td>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>Velocity Vehicle Group</td>
<td>2429 South Peck Road</td>
<td>Whittier, CA 90601</td>
<td>N/A</td>
<td>187</td>
<td>1,500</td>
<td>900</td>
</tr>
</tbody>
</table>
Training Proposal for:

Kern County Electrical Joint Apprenticeship & Training Committee

Agreement Number: ET19-0910

Panel Meeting of: July 27, 2018

ETP Regional Office: North Hollywood          Analyst: L. Vuong

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
<th>Apprenticeship Veterans</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Retrainees</td>
<td>Priority Rate</td>
<td>Apprenticeship Veterans</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Industry Sector(s):</td>
<td>Construction</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Kern</td>
<td></td>
<td></td>
<td>Repeat Contractor:</td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td>International Brotherhood of Electrical Workers, Local 428</td>
<td></td>
</tr>
</tbody>
</table>

Turnover Rate: ≤20%
Managers/Supervisors: (% of total trainees) N/A

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>$260,520</td>
<td></td>
<td>$18,065</td>
<td></td>
<td>$278,585</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 Journeyman Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, OSHA 10/30</td>
<td>15</td>
<td>8-200</td>
<td>0</td>
<td>$667</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>Retrainee Apprentice Priority Rate</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>60</td>
<td>8-200</td>
<td>0</td>
<td>$4,132</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 184</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Retrainee Apprentice Priority Rate Veterans</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>5</td>
<td>8-200</td>
<td>0</td>
<td>$4,132</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 184</td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $22.77 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

Employer-paid health benefits will vary by employer but cannot exceed $2.50 per hour; and may be added to a trainee’s wage to meet the Statewide Average Wage of $22.77 per hour.

### 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>15</td>
<td></td>
</tr>
<tr>
<td>Job No. 2: Apprentice Electrician/Inside Wireman (Veterans)</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Job No. 3: Apprentice Electrician/Inside Wireman (Veterans)</td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

### INTRODUCTION

Founded over 52 years ago, 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. 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 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 a need for training due to 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, solar and oil field projects with local signatory contractors. Journeymen and Apprentice Electricians will be working on turning the solar fields into full functioning 24-hour power plants. In addition, some of the electricians trained under this proposal will work on oil refinery upgrades and High-Speed Rail projects, as well as upgrade and build new schools.

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 DAS. ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case, the programs are five years.

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

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5, reducing the priority industry rate from $26 to $21 per class/lab hour. The ETP wage for Apprentices and Journeymen is no less than $22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel’s information.

PROJECT DETAILS

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 begin the week following Panel approval.

Training Plan

The following classes will be offered to Journeymen:

Commercial Skills: Energy 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: 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: 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: 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: 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: 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.

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.

➢ Training Infrastructure

Kern Electrical JATC has two staff members to coordinate marketing, recruitment, needs assessments, and the scheduling and tracking of training. In addition, Kern Electrical JATC has retained an outside administrative consultant to ensure that all training records adhere to ETP requirements.

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.

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.

Training Coordinator

Kern Electrical JATC has designed two staff members to be responsible for all administrative responsibilities, including scheduling, securing recording and tracking training. Kern Electrical JATC will 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. This representation will be made a condition of the Agreement.
Veterans Program

Kern Electrical JATC is currently working to attract veterans through a national joint labor-management program (Helmets to Hardhats) and its website advertises special days for Veterans to come and participate in job fairs. As such, Kern Electrical JATC will provide training for five veterans (Job Number 3).

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>
</tr>
</thead>
<tbody>
<tr>
<td>ET17-0925</td>
<td>$287,600</td>
<td>01/27/17 – 01/26/19</td>
<td>145</td>
<td>38</td>
<td>TBD</td>
</tr>
</tbody>
</table>

Based on ETP Online Systems, 18,925 reimbursable hours have been tracked for potential earnings of $269,594 (94% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through 10/27/18.

PRIOR PROJECTS

The following table summarizes performance by Kern Electrical 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>ET15-0920</td>
<td>Kern</td>
<td>02/23/15 – 02/22/17</td>
<td>$313,795</td>
<td>$307,660</td>
<td>(98%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

Kern Electrical JATC retained the California Labor Federation (CalFED) in Orangevale and Strategy Workplace Communications (Strategy) in Burlingame to assist with development of this proposal at no charge.

ADMINISTRATIVE SERVICES

Strategy 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 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
- ESAMATC 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
- OSHA 30
**Class/Lab Hours**
8 – 200 (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
- High Voltage Cable Splicing (from 2nd to 5th year)
- ESAMATC energy storage (from 2nd to 5th year)

0-30

**OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)**
- OSHA 10
- OSHA 30

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

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

Ventura County Electrical Joint Apprenticeship and Training Trust Fund

Agreement Number: ET19-0912

Panel Meeting of: July 27, 2018

ETP Regional Office: North Hollywood  Analyst: M. Paccerelli

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retraining</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apprenticeship</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority Rate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Veterans</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Priority Industry: Yes</th>
<th>No</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Union(s): Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>International Brotherhood of Electrical Workers (IBEW), Local 952</td>
<td></td>
</tr>
</tbody>
</table>

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>$304,200</td>
<td>$21,130 (8%)</td>
<td>$325,330</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>Retrainees Journeyman Priority Rate</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>Retrainees Apprentice</td>
<td>Commercial Skills, Business Skills, OSHA 10/30</td>
<td>58</td>
<td>8-210</td>
<td>0</td>
<td>Weighted Avg: 200</td>
</tr>
<tr>
<td>3</td>
<td>Retrainees Apprentice Veteran</td>
<td>Commercial Skills, Business Skills, OSHA 10/30</td>
<td>7</td>
<td>8-210</td>
<td>0</td>
<td>Weighted Avg: 200</td>
</tr>
</tbody>
</table>

Minimum Wage by County: $22.77 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 Participating employers may use health benefits up to $1.01 to meet the Post-Retention Wage in Job Numbers 2 and 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>Journeyman Electrician/Inside Wireman</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Apprentice Electrician/Inside Wireman</td>
<td>65</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1977, the Ventura County Electrical Joint Apprenticeship and Training Trust Fund (JATC) ([www.vcjatc.org](http://www.vcjatc.org)) is a joint effort of the International Brotherhood of Electrical Workers Local 952 and the National Electrical Contractors Association (NECA). The JATC is comprised of labor and management representatives and is governed by a Board of Trustees. With approximately 100 participating employers, the union represents over 400 electricians in Ventura County.
PROJECT DETAILS

The five-year Apprenticeship program offers workers the opportunity to receive classroom and hands-on experience in installation, wiring methods and utilization systems. Apprentices attend classroom training twice a week (1,080 hours) and complete a total of 8,000 hours with electrical contractors throughout Ventura County. This work is performed in residential, commercial and industrial buildings.

Inside Wiremen are trained at the Ventura training facility to install and maintain electrical systems. These electrical systems are found in commercial and industrial facilities, electric vehicle stations and transit systems. The JATC holds the Electric Vehicle Infrastructure Training Program. This class will help keep up with the increasing number of electric vehicles in the Ventura area. It is critical that the JATC offer training listed in this application so that it can keep up with changes in electrical construction such as code and safety by offering classes in new and emerging technologies that focus on renewable energy and highly efficient electrical control systems.

In an effort to promote new advances in green technology, the JATC offers training opportunities to its members in solar panel installation. These courses focus on renewable energy and efficient electrical control systems.

Employer Demand for Training

Signatory employers and union representatives have identified the following reasons for Journeyman skills training, add new courses in Apprentice Related & Supplemental Instruction (RSI): new energy efficiency regulations, the need to reduce costs to remain competitive, higher quality standards, and the increasing complexity of construction projects. Specific construction projects that are generating demand for skilled Apprentices and Journeyman Electricians in the Ventura County region are shown below:

- Ojai Valley Hospital
- Westlake High School
- Elm Street Elementary School
- Thousand Oaks Civic Center Parking Structure
- La Entrada Housing Project
- Camarillo Airport Hangers
- Lighting Retrofit at 7 Hueneme School District Schools
- Ongoing projects at the Proctor and Gamble paper plant in Oxnard
- Ongoing projects at Amgen Corporation in Newbury Park CA
- Ongoing projects at Baxter Pharmaceuticals in Thousand Oaks

A green technology opportunity for the participating employers and its electricians is retrofitting commercial buildings which consume approximately 37 and 42 percent of the state’s power supply for lighting and ventilation. The equipment rooms in these buildings often contain energized equipment such as hubs, file servers or telephone switches. These devices are configured and connected to the communications network that serves the building, and must not be interrupted as a result of work performed by unqualified workers or those only partially trained. The electricians also conduct solar panel installations ensuring that these systems are correctly set up to maximize the capture of energy from the sun.
Apprenticeship Program

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the DAS. ETP funding to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training.

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

Veterans Program

Seven Veterans will be trained under this Agreement (Job Number 3). These trainees are recruited in cooperation with the “Helmets to Hardhats”, a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades.

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.

PROJECT DETAILS

Training Plan

To meet current and future demand for electrical industry workers, Ventura Electrical JATC will provide training for both large and small employers. The proposed training, entirely center-based, is scheduled to commence approximately a week following Panel approval. The following courses will be offered to Journeymen and Apprentices:

Commercial Skills - For Journeymen, this training will focus on Green training 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.

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
Business Skills – This training will focus on new national building codes and green practices; certification guidelines, collaborative bidding, project development practices, meeting budgets, interacting with other types of construction workers, implementing green solutions in traditional work environments and correctly training apprentices on worksites. Training will also include team-building and leadership skills so that electricians can lead teams in an effective and efficient manner. Training will give trainees the tools to plan, organize, train and manage their construction projects so that both the apprentices and journey level electricians can complete jobs efficiently and on time.

OSHA 10/30 - This training is a series of courses “bundled” by industry sector and occupation. The coursework is geared to construction work. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. 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.

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 952 and the National Electrical Contractors Association (NECA) 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.

Marketing and Support Costs

The 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.

To fund its staff in recruiting and qualifying additional participating employers for this program, the JATC is requesting 8% support costs. Staff will also assist with marketing, recruitment, needs assessments and scheduling. 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.

Training Infrastructure

The JATC’s Training Director will oversee the training and internal project administration. An in-house staff person will assist with the marketing, recruitment, needs assessments, and scheduling of training. Training will be delivered by one full-time and 13 part-time trainers who are former or current members of the trade and have received or are scheduled to receive Master Certification status by the Electrical Training Alliance (ETA). In addition, an outside administrative consultant has been retained to ensure that all training records meet ETP compliance.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by 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>ET17-0929</td>
<td>$195,000</td>
<td>01/27/17 – 01/26/19</td>
<td>143</td>
<td>141</td>
<td>79</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 13,967 reimbursable hours have been tracked for potential earnings of $195,000 (100% of the approved Agreement amount). To date, 141 trainees (65 Journeymen, 68 Apprentices and 8 Veteran Apprentices) have completed the required minimum hours. JATC anticipates all remaining completed trainees retained by the end of the year.

PRIOR PROJECTS

The following table summarizes performance by 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>ET16-0911</td>
<td>Oxnard</td>
<td>10/05/15 – 10/04/17</td>
<td>$220,800</td>
<td>$220,024 (99%)</td>
<td></td>
</tr>
<tr>
<td>ET14-0908</td>
<td>Oxnard</td>
<td>01/02/14 – 01/01/16</td>
<td>$315,340</td>
<td>*$201,649 (64%)</td>
<td></td>
</tr>
</tbody>
</table>

*ET14-0908 – According to the JATC representative, it was their first ETP Agreement and they over-estimated the amount of funds requested. In their next ETP contracts, the funding was "right sized" resulting in contract performance of 99-100%.
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 10/30 (Certified OSHA Instructor)
- OSHA 10
- OSHA 30

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

**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 (200 hours for Commercial Skills, Business Skills and OSHA 30, and 10 hours for OSHA 10) in Job Numbers 2-3.
Training Proposal for:
California Labor Federation, AFL-CIO
Agreement Number: ET19-0916

Panel Meeting of: July 27, 2018

ETP Regional Office: San Francisco Bay Area  Analyst: C. Hoover

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprenticeship</td>
<td>Green Technology</td>
<td></td>
</tr>
<tr>
<td>Veterans</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Hire</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SET</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ex-Offender</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple Barriers</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statewide</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) | 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>$1,621,632</td>
<td>$115,106</td>
<td>$1,736,738</td>
</tr>
</tbody>
</table>

Jobs 1-10: 8%
Job 11: 12%

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 Journeyman Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, OSHA 10/30</td>
<td>93</td>
<td>8-200</td>
<td>$667</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 24</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Apprentice Bricklayers &amp; Allied Crafts (Tracy)</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>75</td>
<td>8-210</td>
<td>$3,593</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 160</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Apprentice Electricians (Tri-County)</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>39</td>
<td>8-210</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 200</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Apprentice Electricians (Santa Barbara)</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>33</td>
<td>8-210</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 200</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Apprentice Sheet Metal Workers (Fresno)</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>36</td>
<td>8-210</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 200</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Apprentice Electrician/Inside Wireman (San Joaquin &amp; Calaveras)</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>37</td>
<td>8-210</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 200</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Apprentice Electricians (Central Valley)</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>54</td>
<td>8-210</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 200</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Apprentice Plasterers (San Diego)</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>50</td>
<td>8-210</td>
<td>$3,593</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 160</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Apprentice Sheet Metal Workers (Kern &amp; Northern LA)</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>16</td>
<td>8-210</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 200</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Veteran Apprentice (All Trades)</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>35</td>
<td>8-210</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 200</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Pre-Apprentice New Hire SET / Ex-Offender &amp; Multiple Barriers</td>
<td>Business Skills, Commercial Skills, Literacy Skills, OSHA 10</td>
<td>18</td>
<td>8-260</td>
<td>$5,699</td>
<td>*$13.66</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>Weighted Avg: 200</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 Numbers 1-10 (Journeyman and Apprentice): SET Priority Industry: $22.77 per hour. Job Number 11 (Pre-Apprentice): SET/New Hire - $15.18 per hour in Alameda, Contra Costa, Marin, San Mateo, Santa Clara, and San Francisco counties; $14.62 per hour (Los Angeles County); $14.58 per hour (Orange County); $14.19 per hour in San Diego County; $14.00 per hour in Sacramento County; $13.66 per hour (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 ☑

All Collective Bargaining Agreements provide health benefits and the amount varies by union.

<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 (Journeyman):</strong></td>
</tr>
<tr>
<td>Bricklayers &amp; Allied Crafts</td>
</tr>
<tr>
<td>Electricians</td>
</tr>
<tr>
<td>Plasterers</td>
</tr>
<tr>
<td>Sheet Metal Workers</td>
</tr>
<tr>
<td><strong>Job Numbers 2-9 (Apprentice):</strong></td>
</tr>
<tr>
<td>Bricklayers &amp; Allied Crafts (Tracy)</td>
</tr>
<tr>
<td>Electricians (Tri-County)</td>
</tr>
<tr>
<td>Electricians (Santa Barbara)</td>
</tr>
<tr>
<td>Sheet Metal Workers (Fresno)</td>
</tr>
<tr>
<td>Electricians, Inside Wireman (San Joaquin &amp; Calaveras)</td>
</tr>
<tr>
<td>Electricians (Central Valley)</td>
</tr>
<tr>
<td>Plasterers (San Diego)</td>
</tr>
<tr>
<td>Sheet Metal Workers (Kern &amp; No. Los Angeles)</td>
</tr>
<tr>
<td><strong>Job Number 10 (Veterans):</strong></td>
</tr>
<tr>
<td>Veteran Apprentice (All Trades)</td>
</tr>
<tr>
<td><strong>Job Number 11 (New Hire):</strong></td>
</tr>
<tr>
<td>Pre-Apprentice (All Trades)</td>
</tr>
</tbody>
</table>

*The wage range for Journeymen is due to cost-of-living adjustment by geographic region and varying union locals*

**INTRODUCTION**

The California Labor Federation, AFL-CIO (CalFED) ([www.calaborfed.org](http://www.calaborfed.org)) seeks funding for its sixth statewide “Building Green Skills” training program. This project will be coordinated by the CalFED Workforce and Economic Development program. This will be the tenth ETP Agreement with CalFED, the fourth in the last five years.

Founded in 1901, CalFED is an umbrella organization comprised of 1,200 unions, representing 2.1 million union members in manufacturing, retail, construction, hospitality, the public sector,
healthcare, entertainment and other industries in California. Through this proposal, CalFED will continue to serve its membership working in construction.

This project includes Journeyman, Apprentice, and Pre-Apprentice training. Training will allow Journeymen in various construction trades to learn skills that are in demand for commercial and industrial construction, public infrastructure projects, and “green” construction. Apprenticeship training, the primary focus of this proposal, will include courses on new energy efficiency regulations and goals, in addition to standard Related and Supplemental Instruction (RSI).

**Veteran Apprentice**

CalFED is committed to supporting job-related training that helps Veterans transition into the California workforce. This is the second time Veterans are a distinct cohort of Apprentice trainees. In the prior Agreement, CalFED enrolled 96% of its planned Veteran Apprentices.

Participating JATCs recruit Veterans in cooperation with Helmets to Hardhats, a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades. Individual JATCs may also advertise special days on their websites just for veterans to come in and apply for the apprenticeship program. In some cases, veterans who apply for an apprenticeship can skip the first stage (the written assessment) and go the second stage (the interview).

**Assisting Smaller JATC’s**

CalFED’s project acts as an incubator for smaller apprentice programs that do not have the staff capacity to hold their own ETP contract. For example, many of the JATCs listed in this project have either part-time or no administrative assistance. These small JATCs operate in rural communities throughout the state including Fresno, Bakersfield, Tracy, Stockton, Santa Barbara, and outlying areas of San Diego and Modesto. The goal is to “graduate” a JATC into its own ETP contract based on its performance under this proposal along with improvements in its DAS completion rate. To date, this model has allowed nine JATCs to hold their own ETP contracts.

Each JATC is a DAS-approved apprenticeship program sponsor. Training will be in a series of occupations as shown below per Job Number:

**Job No. 2:** Bricklayers & Allied Crafts Local 3 JATC  
Marble Mason  
Marble Finisher  
Terrazzo Mechanic  
Terrazzo Finisher  
Pointer-Cleaner-Caulker  
Bricklayer  
LEA: Hayward and San Leandro Adult Schools

**Job No 3:** Tri-County Electrical Local 234 JATC  
Electrician  
LEA: Hartnell Community College

**Job No. 4:** Santa Barbara County Electrical Local 413 JAC  
Electrician  
LEA: LA County Office of Education and Allan Hancock Community College

**Job No. 5:** Fresno Sheet Metal Local 104
Sheet Metal Worker  
LEA: Fresno Regional Occupational Program

Job No. 6: San Joaquin & Calaveras Counties Electrical Local 595 JATC  
Electrician/Inside Wireman  
LEA: San Joaquin Delta Community College

Job No. 7: Central Valley Electrical Local 684 JATC  
Electrician  
LEA: Stanislaus County Office of Education

Job No. 8: San Diego Plastering Industry Local 200 JATC  
Plasterers  
LEA: North Orange County Regional Occupational Program

Job No. 9: The Kern & Northern Los Angeles Countries A/C and Sheet Metal Local 105  
Sheet Metal Workers  
LEA: Bakersfield Community College

Job No. 10: Veteran Apprentice (All Trades)

Job No. 11: Pre-Apprentice (All Trades)

**Apprenticeship Program**

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 proposal, the programs are three to five years in length.

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

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5, reducing the priority industry rate from $26 to $21 per hour. Journeymen training is reimbursed at the priority industry retraining rate of $26 per hour. The ETP wage for Apprentices and Journeymen is no less than $22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel’s information.

**Entry Level Pre-Apprenticeship Program**

CalFed is partnering with Flintridge Center, a local non-profit training center located in Los Angeles County. Flintridge Center offers construction training in close collaboration with the Los Angeles/Orange County Building Trades Council, and it has a demonstrated history of serving the Multiple Barriers and Ex-Offender population. With its 70 participants in 2017, the training program had a graduation rate of 87% and a job-placement rate of 57%.

Upon graduation, trainees who participate in this community-based program will be eligible to be accepted into local unions’ more formalized apprentice programs with high wages, long-term
employment, pensions, healthcare and ongoing training throughout their careers. In fact, an estimated 29% of graduates were accepted into Apprenticeship programs in 2017.

CalFED’s Job Number 11 (Pre-Apprentice) will receive Commercial Skills, Business Skills, Literacy Skills and OSHA 10 training. While Ex-Offender trainees are subject to a lower wage requirement (up to 25% below the New Hire wage), no waiver is being requested. The wage scale is $24 - $60 per hour for these trades, and the bulk of the jobs gained by graduates are above $13 per hour. In addition, the recidivism rate of participants is estimated at 7% in contrast with a statewide average rate of 50% indicating the program has positively impacting upward mobility for participants.

Ex-Offender/At-Risk Youth

Ex-Offender/At-Risk Youth (Job Number 11) will be funded as Special Employment Training/Multiple Barriers.

➢ Retention Modification

Retention may be satisfied by employment of at least 30 hours a week for at least 90 days, out of 120 consecutive days with up to three employers. For occupations in which workers are hired for short-term jobs, retention may be satisfied by employment of at least 500 hours within 180 days. Incidental placement with public and non-profit entities is permissible, not to exceed 25% of the total number of trainees retained in employment.

Green/Clean Technology and Employer Demand

This project will incorporate trade-specific green skills training, which may be ancillary to traditional RSI. According to CalFED, construction trade employers are demanding this type of specialized skill, even from Apprentices, given recent energy efficiency and renewable energy legislation. CalFED has identified the following factors generating demand for the proposed training:

Employers need: (1) workers who able to construct building and install systems that maintain energy efficient buildings as outlined by LEED and other energy efficiency standards; training in green construction and industry certifications will position the employers to bid on new projects; (2) more qualified construction workers to replace retiring journeymen; (3) workers with the ability to adapt quickly and competently to new technologies, (4) more workers skilled in safety competency, as opposed to just safety awareness and (5) more skilled workers who can meet the demand generated by increased construction of hospitals, prisons, public works projects, commercial buildings, wind and solar projects, office building retrofits and schools.

Trainees require the skills to install and maintain new kinds of equipment, work with new materials, and comply with the latest complex and rapidly changing energy efficiency standards. For instance, the 2013 Building Energy Efficiency Standards (Title 24) established by the California Energy Commission (CEC), requires training and certification to perform mechanical acceptance testing of newly installed mechanical equipment in non-residential buildings before occupancy is approved. Acceptance Tests ensure code compliance and promote optimization of efficiency and performance for nonresidential buildings. The CEC is currently at a standstill in enforcing the requirement of certifying mechanical equipment per their 2013 standard until a minimum threshold of certified technicians in the discipline of Testing, Adjusting, and Balancing (TAB) become available in all areas of the state of California.

The training outlined in this proposal will assist employers to certify more workers to meet customer demands. JATCs have not been providing this training in the past due to the low
demand for such services by mechanical contractors, but this demand is changed due to the requirements of Title 24.

Training will also cover energy-efficient technologies and products: solar photovoltaic panels, wind turbine systems, new motor controls, green building materials; advanced welding skills including Tungsten Inert Gas, Metal Inert Gas and/or Stick Welding; climate energy efficiency and consumption greenhouse gas abatement; solar hot water and water efficiency installation and retrofitting; reuse/recycled water and wastewater treatment systems; and green materials testing and audit equipment. This training will help workers gain the knowledge and hone the skills necessary to work in green construction.

PROJECT DETAILS

Training will occur at each JATC’s designated training facility. Instructors are qualified journeymen with extensive practical training experience, and will deliver the following training using Class/Lab or E-Learning delivery methods:

Journeyman and Apprentice Training

Commercial Skills: Training is customized for each trade, although coursework will also be provided across all trades and occupations in energy audits, equipment installation, testing, energy auditing, green awareness, blueprint reading, and welding.

Computer Skills: Training will include scheduling, planning and modeling software and AutoCAD applications that provide trainees with the ability to modify blueprints, look up project requirements, build budgets and timelines, design virtual buildings, and adjust computerized control systems.

Business Skills: Training will teach trainees to work not only with workers within their trade, but also with other workers on construction projects. Because energy efficiency techniques and new computerization of work involves more coordination than project teams have needed in the past, improved business skills are essential. The proposed training will give trainees the tools to plan, organize and manage projects to complete them efficiently and on time. Training may include team-building, problem-solving, decision-making and leadership skills so that Journeymen can lead and participate effectively in the team environment.

OSHA 10/30: Training provides a complete overview of occupational safety and health so that construction workers are more knowledgeable about workplace hazards. With OSHA30, apprentices will also learn how to respond to such hazards. 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. Completion of the training results in a certificate that expands employment opportunities.

Pre-Apprentice (Ex-Offender/Multiple Barriers) Training

Commercial Skills: Training will cover Multi-Craft Curriculum topics that provide trainees with skills on Basic Blueprint Reading, Construction Training, First Aid / CPR, Green Construction, and Tools and Materials.

Business Skills: Training will cover Communications and Trade Awareness courses. Course will include Critical Thinking, Leadership, Problem Solving, and Team-Work topics.
**Literacy Skills:** Training in Vocational English, Vocational Math, and Soft Skills (Workplace Readiness) will be delivered.

**OSHA 10:** Training will cover Introduction to OSHA with courses in Electrical Safety, Hazard Awareness, Health Hazards, Personal Protective Equipment, Scaffold and Safety, Stairway and Ladders, and Tools- Hand and Power.

**Impact/Outcome**

The JATCs will offer certification classes for OSHA 10/30, Green Audits, Arc Flash Safety Awareness, Building Automation Systems, Rigging and Lifting, Medical Gas Installer, Medical Gas Brazer, Foreman’s Certification, Industrial Rigger Certification and various welding certifications. Currently, there are minimal green certifications for the trades participating in this project. However, such certifications are becoming more widespread. Trainees will be prepared to meet any new requirements.

**Curriculum Development and Feedback**

The JATCs use national curricula developed by the international unions in concert with industry organizations such as the International Training Institute and the National Electrical Contractors Association and Sheet Metal and Air Conditioning National Association. Curricula are then customized to address the needs of the local union membership, participating employers, and the local construction and green industry technologies and practices.

Feedback comes directly from the participating employers based on workplace performance, requests of customers, and needs of the industry as well as course evaluations that are completed by trainees.

Flintridge Center’s Pre-Apprentice program has been utilizing the National Building Trades Unions’ Multi-Craft Core Curriculum (MC3) to ensure pre-apprentices learn both hard and soft skills. This training program has existed for eight years with successful graduation and job-placement rates. MC3 is an industry-valued certificate program, and training modules are approved in collaboration with local unions.

**Training Coordination**

The start of training will vary by participating JATCs. At this time, the first training class is scheduled to begin mid-August 2018. Each JATC will be responsible for coordinating and scheduling training classes. While the training schedules vary from trade-to-trade, the majority of training will occur in the fall, winter and spring months.

➢ **Training Infrastructure**

Each JATC’s Training Director and administrative staff will oversee ETP administration including scheduling of training and collection of rosters. The enrollee and employer data, demographics and work hour data is then sent to CalFED’s third-party administrator, Strategy Workplace Communications.

**Commitment to Training**

In all instances, the participating JATCs represent that signatory employers will continue to pay into the respective Trusts for Journeyman and Apprentice training. In addition, the signatory employers provide all structured on-the-job training for Apprentices that meet DAS standards.
Safety training is provided by the participating employers in accordance with all requirements under state and federal law.

**Marketing, Employer Recruitment & Support Costs**

CalFED is requesting 8% in support costs for Job Numbers 1-10 (Journeyman and Apprentice) to fund its staff in marketing and assessment. Individual JATCs will market the Journeyman program training programs through direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and websites. JATCs prepare multimedia materials such as videos to inform employers, workers, students, and community organizations about new Apprenticeship, Journeyman, and green construction training opportunities. The JATCs also work with their local WIBs in actively recruiting Apprentices.

CalFED is requesting 12% support costs for Job Number 11 (Pre-Apprentice/Ex-Offender) to support the additional placement and outreach services including marketing associated with serving the multiple barrier population, specifically Ex-Offenders. The extra support cost will be directed to Flintridge for the extra work necessary to reinforce placement services.

While most participating employers have already been notified, additional outreach and assessment, will occur for journeyman and apprentice training. Assessment of employer-specific job requirements will occur throughout the term of the contract. CalFED staff will promote the training program at the California annual apprenticeship conference, statewide WIB meetings, labor-industry meetings and CalFED annual workforce development conference. In addition, email and face-to-face marketing to employers, contractors associations, and local unions will be ongoing and necessary to ensure the training program's success.

Each JATCs’ Training Coordinator, along with their staff, administrative assistants, union representatives and trainers will also assist in marketing, recruiting, conducting needs assessments, and scheduling training. Staff recommends 8% support costs for Jobs 1-10 and 12% for Job 11.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

The following table summarizes performance by CalFED 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>ET17-0913</td>
<td>$678,720</td>
<td>11/1/16 – 10/31/18</td>
<td>284</td>
<td>122</td>
<td>122</td>
</tr>
</tbody>
</table>

Based on ETP Systems, hours of training have been delivered to date sufficient to show earnings of $686,726 (potentially 100% of the Approved Amount).

**PRIOR PROJECTS**

The following table summarizes performance by CalFED 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>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0905</td>
<td>Statewide</td>
<td>8/4/14 - 8/3/16</td>
<td>$678,720</td>
<td>$678,720 (100%)</td>
</tr>
<tr>
<td>ET13-0904</td>
<td>Statewide</td>
<td>9/5/12 - 9/4/14</td>
<td>$593,511</td>
<td>$540,578 (91%)</td>
</tr>
</tbody>
</table>

**DEVELOPMENT SERVICES**

Strategy Workplace Communications in Burlingame assisted with development of this proposal at no cost.

**ADMINISTRATIVE SERVICES**

Strategy Workplace Communications will also perform administrative services in connection with this proposal for an amount not to exceed 13% of payment earned.

**TRAINING VENDORS**

N/A
Exhibit B: Menu Curriculum

Class/Lab/E-Learning Hours
8-200 (Job Number 1)

Journeyman

Trainees may receive any of the following:

COMMERCIAL SKILLS

Electricians
- Solar Panel Installation
- 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
- 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
- Confined Space Entry
- Specialized Tools
- Conduit Bending
- Rigging
- Firestop Installation
- Blueprints and Schematics
- Work Flow and Resources

California Advanced Lighting Control Program
- Advanced Lighting Control Systems
- Lighting Control Strategies
- Line Voltage Switching Controls
- Low Voltage Switching Control
- Dimming Controls
- Occupancy Sensors
- Photosensors
Energy Storage
- SAM-TAC (Energy Storage / Micro Grid and Certification)
- Micro Grid
- Micro Grid (ESM) Systems

Sheet Metal Workers
- Advanced Welding Skills
- Architecture Designs
- CA Green Building Code Training
- Ducts Maintenance
- Energy Auditing: Total Building (Green Training)
- Energy Auditing: Total Heating Ventilation and Air Conditioning (HVAC) Systems (Green Training)
- Fire / Life HVAC System Building Inspection Training
- HERS (California Home Energy Rating System Program)
- Job Coordination Training
- Lean Construction Training
- Management and Monitoring of Materials
- Materials and Equipment Testing for Industrial Use
- Proper Machine and Equipment Set-Up
- Rigging and Signal Training
- Safe Working Practices
- Testing Materials and Equipment– Proper Set-Up and Use
- Understanding Changes to Industry Standards
- Upgrading Lead Handling and Asbestos Removal Skills
- Working with Building Materials Training

All Trades
- Advanced Instrumentation and Motor Controls
- Advanced Welding
- Aerial Lift
- Architecture Designs and Advanced Plan Reading
- Energy Audits
- Management and Monitoring of Materials
- Preparing for Leadership
- Programmable Logic Controllers
- Proper Equipment Set-Up (Green Training)
- Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)
- Safe Working Practices (10% cap of a trainee’s total hours)
- Testing Materials and Equipment –Proper Set-Up and Use (Green Training)
- Understanding Changes to Industry Standards (Green Training)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- Welding and Burning
OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)
• OSHA 10
• OSHA 30

COMPUTER SKILLS
• 3-D Modeling – Virtual Construction
• Auto Computer-Aided Design (AutoCAD)
• Automated Systems Applications Scheduling & Planning Jobs
• Benchmark Software – Lean Construction
• Scheduling and Planning Jobs

BUSINESS SKILLS
• Advanced Time Management
• Conflict Resolution
• Creating Master Plan for Future Improvements
• Creating Project Bids
• Customer Service
• Decision Making
• Filling Out Work Documents and Reports Accurately
• Green Awareness Training and Green Certifications
• Inventory Checklist
• Leadership Skills
• Problem Solving
• Project Management
• Teambuilding Skills

Class/Lab/E-Learning Hours
8-210 (Job Numbers 2 - 10)

Apprentice

Trainees may receive any of the following:

COMMERCIAL SKILLS

Electricians
• AC Refrigeration
• AC Theory
• Blueprints
• Building Automation and Controls
• Circuits
• Closed Circuit Television
• Codeology: Code and Practices
• Conduits
• Control Diagrams and Drawings
• Digital Electronics, DC Theory and DC/AC Theory
• Distributed Generation
• Electric Vehicle Infrastructure
• Electrical Grounding
• Electrical Motors
• Electrical Safe Work Practices
• Electrical Theory and Electrical Code
• Energy Storage and Microgrid (ESM) Systems
• Estimating
• Fire Alarm Systems
• First Aid / CPR
• Generators and Transformer Theory
• Grounding and Bonding
• Hazardous Location
• Health Care Systems
• Hoisting
• Industrial Blueprints
• Installer / Technician
• Instrumentation
• Lighting Essentials and Protection
• Local Area Network
• Low Voltage Systems and High Voltage Systems
• Materials, Tools and Wire Methods
• Mathematics
• Mechanical and Electric Benders
• Micro Grid & Energy Storage
• Motor Control
• National Electric Code Grounding
• National Electrical Code
• Nurse Call System
• Over-Current Protection
• Paging System
• Photovoltaic Systems
• Pipe Bending
• Power Quality
• Preparing for Leadership
• Programmable Logic Controllers
• Radio Frequency Communications
• Rigging
• SAM-TAC (Energy Storage and Micro Grid Training and Certification)
• Security System
• Semiconductor Electronics
• Sound Reinforcement
• Structured Cabling
• System Sec / Solar or Theory CD/B
• Telephony
• Test Instruments and Test Instruments Applications Manual
• Torque
• Transformers and Transformer Connections
Plasterers

- Acoustical Plaster Finish
- Aerial Lift
- Blueprint Reading
- Cementitious, Mineral Fiber and Intumescent Fireproofing
- Common Tools and Plastering Tools and Materials
- Estimating
- Exterior Insulation Finish System
- First Aid / CPR
- Fundamental Math
- Green Building Standards
- Inspect Lath & Plaster Bases
- Mask and Protect Adjacent Surfaces
- Measuring
- Mix and Apply Inspect Lathing and Bases for Portland Cement Scratch Coat
- Mix and Apply Portland Cement Scratch Brown and Finish Coats
- Mix and Apply Scratch Coat, Brown Coat, Finish Coat and Veneer
- Ornamental and Earth Plasters
- Small Engine Operation and Maintenance
- Workplace Safety and Health

Terrazzo

- Blueprint Reading
- Building Codes
- Cleaning and Sealing Terrazzo
- Construction Sequence
- Cutting Control Joints
- Design Layout
- First Aid / CPR
- Floor Layout and Installation
- Green Construction, Design, Materials, Methods and Techniques, LEED Certification
- Grouting and Caulking
- Hand Tool and Equipment, Proper Use and Safety
- Materials, Identification, Characteristics, and Estimating
- Membranes and Underlayments
- Mixing Mortar and Bonding Materials
- Repair and Renovation of Terrazzo
- Scaffold Safety Training
- Substrates, Mixing and Bonding Materials
- Terrazzo Materials and Handling
- Trade Math
Bricklayer
- Blueprint Reading
- Building Arches
- Building Codes
- Building Radius Walls
- Construction Sequence
- Cutting and Welding Steel
- Drawing and Sketching Techniques
- First Aid / CPR
- Green Construction, Design, Materials, Methods and Techniques, and LEED Certification
- Hand Tool and Equipment, Proper Use and Safety
- History of Masonry
- ICF (Insulated Concrete Forms)
- Interlocking Paving
- Laying Corner Leads
- Laying Headers, Soldiers, and Roloks
- Laying Piers
- Laying Pilasters
- Laying to the Line
- Lintel Beam Construction
- Materials, Identification, Characteristics and Estimating
- Metrics
- Mixing Mortar
- Pattern Bonds
- Paving
- Proto II Walls
- Read a Rule
- Rebar Identification and Installation
- Scaffold Safety
- Segmental Retaining Walls
- Trade Math
- Transit Familiarization
- Waterproofing

Marble, Pointer, Cleaner and Caulker Workers
- Basic Bricklaying Fundamentals
- Blueprint Reading
- Building Codes
- Caulking
- Cleaning and Polishing Marble
- Cleaning Masonry
- Construction Sequence
- Cutting and Welding Steel
- Deck Coatings
- Drawing and Sketching Techniques
• Drilling and Cutting Marble to Specific Dimensions
• Epoxy Injection
• First Aid / CPR
• Fundamentals of Marble Setting
• Green Construction, Design, Materials, Methods and Techniques, and LEED Certification
• Grouting and Caulking Slabs
• Hand Tool and Equipment
• Hand-Set Techniques
• Laying and Cutting Building Units
• Laying and Setting on Footings and Foundations
• Materials, Identification, Characteristics and Estimating
• Mechanical Anchoring
• Metrics
• Mixing Mortar and Epoxy
• Move and Store, Rig and Hoist Materials
• Patching Marble and Related Materials
• Pinning
• Pointing, Caulking, and Cleaning
• Prepare Marble for Setting, Including Anchoring and Plugging
• Rigging
• Scaffold Erection and Safety Training
• Substructure Preparation
• Trade Math
• Tuckpointing
• Waterproofing
• First Aid / CPR

Sheets Metal

Building Trades Service
• Advanced Electricity for Sheet Metal Air Conditioning Service
• Air Conditioning, Commercial Systems, and Heating
• Basic Electricity for Sheet Metal Air Conditioning Service
• Basics of Architectural Sheet Metal
• Commercial Systems, Heat Loads, and Piping
• First Aid / CPR
• Properties of Air Distribution for Sheet Metal Air Conditioning Service
• Refrigeration for Sheet Metal Air Conditioning Service
• Refrigeration Theory for Sheet Metal Air Conditioning Service
• Sheet Metal Control Systems

Energy Management Test and Balance
• Advanced Architectural
• Advanced Layout and Fabrication
• Advanced Welding
- Architectural Sheet Metal
- Basics of Architectural Sheet Metal
- CAD Detailing
- Codes and Standards
- Fabrication and Shortcuts
- Field Installation
- Final Architectural / Industrial Project
- Final HVAC Project
- First Aid / CPR
- Foreman Training
- HVAC Air Systems and Duct Design
- HVAC Energy Conservation
- Industrial and Stainless Steel Introduction
- Intermediate CAD
- Measuring and Sketching
- Metal Roofing
- Parallel Line Fittings
- Plans and Specifications
- Project Management, Takeoffs, and Estimates
- Radial Line Layout and Ogee Offsets
- Service Basics for Sheet Metal Workers
- Submittals and Shop Drawings
- Triangulation Fittings
- Welding I: Process and Safety Overview, GMAW
- Welding II: GMAW & FCAW

Building Trades Sheet Metal
- Advanced Architectural
- Advanced Layout and Fabrication
- Advanced Welding
- Architectural Sheet Metal
- Basics of Architectural Sheet Metal
- CAD Detailing
- Codes and Standards
- Fabrication and Shortcuts
- Field Installation
- Final Architectural / Industrial Project
- Final HVAC Project
- First Aid / CPR
- Foreman Training
- HVAC Air Systems and Duct Design
- HVAC Energy Conservation
- Industrial and Stainless Steel Introduction
- Intermediate CAD
- Measuring and Sketching
- Metal Roofing
- Parallel Line Fittings
- Plans and Specifications
- Project Management, Takeoffs, Estimates
- Radial Line Layout and Ogee Offsets
- Service Basics for Sheet Metal Workers
- Submittals and Shop Drawings
- Triangulation Fittings
- Welding I: Process and Safety Overview, GMAW
- Welding II: GMAW & FCAW

Residential HVAC
- Common Furnace Features
- Filters and Filter Housings
- First Aid / CPR
- Furnace Installation
- Installing Thermostats, Flues and Vents
- Piping
- Residential AC Units
- Residential Duct Systems
- Residential Structure and Sheet Metal Work

**OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)**
- OSHA 10
- OSHA 30

**Class/Lab/E-Learning Hours**
8-260 (Job Number 11)

**Pre-Apprentice**

Trainees may receive any of the following:

**COMMERCIAL SKILLS**
Multi-Craft Curriculum
- Construction Training
- Green Construction
- Tools and Materials
- Basic Blueprint Reading
- First Aid / CPR
- Hazard Awareness
- Electrical Safety
- Personal Protective Equipment
- Health Hazards
- Scaffold and Safety
- Hand and Power Tools
- Stairway and Ladders

**LITERACY SKILLS**
- Vocational Math
- Vocational English
- Soft Skills (Workplace Readiness)

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

**BUSINESS SKILLS**
- Communications
  - Leadership
  - Critical Thinking
  - Problem Solving
  - Team-Work
- Trade Awareness

**OSHA 10 (OSHA Certified Instructor)**
- Introduction to OSHA
  - Electrical Safety
  - Hazzard Awareness
  - Health Hazards
  - Personal Protective Equipment
  - Scaffold and Safety
  - Stairway and Ladders
  - Tools- Hand and Power

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

---

Note: Reimbursement for retraining is capped at 200 total hours per trainee for Job Number 1 and 210 total hours for Job Numbers 2-10, regardless of method of delivery. Reimbursement for new hire training is capped at 260 total training hours per trainee (Job Number 11).
Training Proposal for:

Carpenters Training Committee for Northern California

Agreement Number: ET19-0905

Panel Meeting of: July 27, 2018

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

**PROJECT PROFILE**

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Apprenticeship</th>
<th>Veterans</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Northern California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat Contractor:</td>
<td>Yes</td>
</tr>
<tr>
<td>Union(s):</td>
<td>Yes</td>
</tr>
</tbody>
</table>

| Turnover Rate:        | ≤20%                 |
| Managrs/Supervisors:  | N/A                  |

**FUNDING DETAIL:**

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>$877,910</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Support Costs</td>
<td>$61,678 8%</td>
</tr>
</tbody>
</table>

Total ETP Funding = $949,588

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>Pre-Apprentice</td>
<td>Commercial Skills, Literacy Skills</td>
<td>70</td>
<td>8-200</td>
<td>0</td>
<td>$3,706</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 165</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Journeyman</td>
<td>Commercial Skills, Continuous Improvement, OSHA 10/30</td>
<td>39</td>
<td>8-200</td>
<td>0</td>
<td>$1,112</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Apprentice</td>
<td>Commercial Skills</td>
<td>210</td>
<td>8-200</td>
<td>0</td>
<td>$2,695</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 120</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Apprentice Veteran</td>
<td>Commercial Skills</td>
<td>30</td>
<td>8-200</td>
<td>0</td>
<td>$2,695</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 120</td>
<td></td>
</tr>
</tbody>
</table>

Minimum Wage by County: Priority Industry Statewide Average Wage: $22.77 per hour.
Health Benefits: ☑ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☐ Yes ☑ No ☐ Maybe

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></td>
<td>70</td>
</tr>
<tr>
<td>Apprentice and Veteran Apprentice Carpenter</td>
<td></td>
<td>240</td>
</tr>
<tr>
<td>Journeyman Carpenter</td>
<td></td>
<td>39</td>
</tr>
</tbody>
</table>

INTRODUCTION

Carpenters Training Committee for Northern California (CTCNC) [www.ctcnc.org](http://www.ctcnc.org) is the educational organization that provides Pre-Apprentice, Apprentice, and Journeyman training services for union carpenters throughout Northern California. CTCNC is funded by a joint labor and management trust, as agreed to in collective bargaining. The CTCNC Apprenticeship training program has been established for many years as approved by the Division of Apprenticeship Standards (DAS).

Representatives from the United Brotherhood of Carpenters and Joiners of America, which includes 27,500 journeymen carpenters, serves on CTCNC and the Board of Trustees. Signatory employers also serve on both the Committee and the Board, through the Construction Employers’ Association of California (CEA).

CTCNC also provides training for 5,600 registered Apprentices in 46 counties across Northern and Central California. To better serve industry needs and reduce turnover, CTCNC operates a Pre-Apprentice training program to build worker skill levels prior to entering apprenticeship.
This is the eighth ETP Agreement between ETP and CTCNC, the sixth within the last five years. Veterans are included as a distinct cohort of trainees. CTCNC has been successful in its efforts to serve Veterans: 135 Apprentice Veterans were enrolled and trained under its active contract.

The number of Apprentices in its program has increased by over 20% in the last year. There are 1,000 more apprentices in training than a year ago. Employer demand for apprentices is likely to result in 400 more apprentices registered by the end of 2018. This rate of program expansion is expected to continue.

Employer Demand for Training

There is continued significant demand for carpenters and other construction workers in Northern and Central California as the economy remains strong and construction expands. Among the larger projects where carpenters are working includes commercial building construction in San Francisco and Silicon Valley, Stanford Hospital facilities, the expansion of the UC Merced campus, and a new stadium in Oakland. These, and many other construction projects, are driving CTCNC to recruit more Pre-Apprentices and indenture more Apprentices.

Apprenticeship Program

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 proposal, the Carpenters Apprentice program is four years.

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

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5, reducing the priority industry rate from $26 to $21 per hour. The ETP wage for all trainees is no less than $22.77 per hour, tracking the Special Employment Training wage as modified for priority industries.

PROJECT DETAILS

All training is class/lab and center-based. CTCNC is headquartered in Pleasanton, and operates five training centers. The Fairfield center consists of two buildings, 10 classrooms, 60,000 square feet of shop space, and a welding facility. The 52,000 square foot Pleasanton center will be replaced with a new 86,000 square foot center with 16 classrooms, an auditorium, and a welding shop with 50 welding booths. The Hayward center has 40,000 square feet of training space and a welding shop. The Fresno center is 12,000 square feet with a welding shop and two classrooms. The Morgan Hill enter is 32,000 square feet and will be expanded to 53,000 square feet with 8 classrooms and a welding shop.

Training under this proposal will begin in August 2018 and is estimated to be completed by December 2018.
Training Plan

Pre-Apprentice – Job Number 1

Commercial Skills - Pre-Apprentice training will provide basic skills needed to perform productive work on a job site, including use of lifts and scaffolding, basic hand and power tools, material handling, framing, layout, basic blueprint reading, and concrete framework. The Pre-Apprentice training improves retention rates within the industry and serves the signatory employers who hire Apprentices. Persons who successfully complete the Pre-Apprentice training have the basic skills needed to succeed on a construction jobsite and keep working in the construction industry. This training reduces turnover and builds skills.

Literacy Skills - Training will include Basic Algebraic Equation, Communication Skills, Fractions, Decimals, Positive and Negative Numbers, Math Skills for Construction, and Understanding the Numbering System to give trainees the proper foundation to be successful Apprentices.

Journeyman – Job Number 2

Commercial Skills - Training will be offered in advanced skills such as Bridge Building, Advanced Millwright Skills, Green Building, Hardwood Flooring, Lead Abatement, Pile Driving Setup and Operation, Stairs, Roofs, and Welding. These courses will be more advanced than Apprentice courses. This training will supply employers with journey level carpenters with specialty skills and certifications, including welding, commercial construction practices, and advanced rigging and scaffolding.

Continuous Improvement - Training will include Team Skills and Team-Leader Skills to ensure that trainees can lead teams at their worksites.

OSHA 10/30 – OSHA 10/30 is a series of courses “bundled” by industry sector and occupation. Typically, it is delivered to workers in the building trades. OSHA 10 consists of 10 hours of training and OSHA 30 consists of 30 hours of training. 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 OSHA is delivered via Computer-Based Training (CBT), 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. Journeymen trainees may receive OSHA 10 and/or OSHA 30 training.

Apprentices – Job Numbers 3 and 4

Commercial Skills - Training will be offered in Carpenter Apprenticeship, and customized skills as a Drywall/Lather, Insulator, Pile Driver, Shingler, Acoustical Installer, Hardwood Floor Layer, Millwright or Scaffold Erector Apprentice to ensure trainees have the various skills required for the construction industry.

Veterans

The training curriculum for Veterans will be the same as above. Veterans are recruited directly into first-year Apprenticeships by CTCNC, bypassing the Pre-Apprentice requirement. CTCNC works in cooperation with Helmets-to-Hardhats, a national joint labor-management program (www.ctcnc.org/helmets-to-hardhats) to help transition active duty military personnel into employment in the construction industry, including Apprenticeship programs.
Employer Needs Assessment

This training program was created and is governed by a joint labor management committee established through collective bargaining. Industry needs are determined by the committee, which provides feedback on effectiveness; assessment of employer-specific job requirements; employer discussions to ensure that industry trends are being addressed in each training program; feedback from the labor and management team that administers the program; and evaluations from trainees and program staff.

Marketing and Support Costs

Employers participate as members of CTCNC, which is a joint labor-management committee. They are notified of training through CTCNC’s website, mailings, and presentations. Although these are signatory employers, additional recruitment is still needed for Pre-Apprentice training, Journeyman awareness, and trainee assessment. CTCNC requests, and staff recommends, 8% in support costs for marketing, recruitment, and assessment activities.

Commitment to Training

CTCNC has provided training to this trade for over 50 years. Signatory employers will continue to contribute to the training trust for every hour worked by Apprentices and Journeymen. Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law.

Impact/Outcome

Trainees will receive industry certifications specific to their training including the following:

Aerial Lift Safety
Asbestos Abatement
Bridge Building
Commercial Door Hardware
Concrete Formwork
Confined Space Entry
Fall Protection
Fork Lift Operator Safety
Green Building Awareness
Hazardous Waste General Site Worker
Lead Abatement
Lockout/Tag out
Material Safety Data Sheets
OSHA10/30
Rigging
Scaffold Erecting
Scaffold User
Solid Surface Materials Installation
Welding
Trainer Qualifications and Administrative Infrastructure

Trainers are qualified Journeymen with extensive practical and training experience employed by CTCNC. Four additional CTCNC staff members are responsible for training coordination, including but not limited to marketing, recruitment, needs assessments, scheduling, and ETP administration.

Electronic Recordkeeping

Staff has approved the CTCNC’s use of a Learning Management System for recordkeeping.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by CTCNC 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>*ET18-0903</td>
<td>$949,327</td>
<td>07/05/2017-07/04/19</td>
<td>433</td>
<td>1,367</td>
<td>1,367</td>
</tr>
</tbody>
</table>

*All training was completed by May 10 2018. ETP records show that 1,367 trainees have been placed. The ETP On-Line system indicates 87,923 reimbursable hours have been tracked which equates to over 100% of the Agreement amount. Fiscal Close-out will be submitted in July 2018.

PRIOR PROJECTS

The following table summarizes performance by CTCNC 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>ET17-0902</td>
<td>Central &amp; Northern California</td>
<td>08/01/2016-07/01/2017</td>
<td>$948,970</td>
<td>$948,970 (100%)</td>
<td></td>
</tr>
<tr>
<td>ET16-0907</td>
<td>Central &amp; Northern California</td>
<td>08/01/2015-07/31/2016</td>
<td>$948,416</td>
<td>$948,416 (100%)</td>
<td></td>
</tr>
<tr>
<td>ET15-0903</td>
<td>Central &amp; Northern California</td>
<td>07/01/2014-06/30/2016</td>
<td>$1,191,507</td>
<td>$1,191,507 (100%)</td>
<td></td>
</tr>
<tr>
<td>ET14-0900</td>
<td>Central &amp; Northern California</td>
<td>07/01/2013-06/30/2015</td>
<td>$847,977</td>
<td>$847,977 (100%)</td>
<td></td>
</tr>
<tr>
<td>ET12-0175</td>
<td>Central &amp; Northern California</td>
<td>11/21/2011-11/20/2013</td>
<td>$723,370</td>
<td>$722,224 (99%)</td>
<td></td>
</tr>
</tbody>
</table>
DEVELOPMENT SERVICES

CTCNC retained Steve Duscha Advisories in Sacramento to assist with development of this proposal for a flat fee of $10,000.

ADMINISTRATIVE SERVICES

CTCNC also retained Steve Duscha Advisories to perform administrative services for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Job Number 1: Pre-Apprenticeship

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Architect’s Scale
- Basic Blueprint Reading
- Basic Hand Tools
- Basic Roof Structures
- Carpenter Terminology
- Compressors
- Concrete Formwork
- Construction Math
- Drywall Framing
- Exterior Finish Applications
- Forklift
- Foundation walls
- Framing
- Green Awareness
- Hazard Communicating
- Job site roles and responsibilities
- Job site systems
- Layout
- Lead and Asbestos Awareness
- Material Handling
- Measurement
- Negotiating with co-workers at the job site
- Orthographic Drawing
- Power Tools
- Safe Working Conditions
- Scaffold Use
- Solar installation
- Using lifts
- Wood and Metal Framing

LITERACY SKILLS

- Basic Algebraic equation
- Communication Skills
- Fractions, decimals, positive and negative numbers
- Math skills for construction
- Understanding the numbering system

Literacy Training cannot exceed 45% of total training hours per-trainee.
Class/Lab Hours
8-200

Job Number 2: Journeymen

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Acoustical Ceilings
- Advanced millwright skills
- Aerial Lift Safety
- Asbestos Abatement Worker or Supervisor
- Blueprint Reading
- Bridge Building Certification
- Bridge Falsework
- Cleanroom Protocol & Construction
- Commercial Door Hardware
- Commercial Interior Systems
- Commercial Metal Lath (Drywall/Lather)
- Commercial Solar Installation
- Concrete Formwork
- Confined Space Awareness
- Confined Space Entry
- Construction Calculator
- Construction Math & Intro to Working Drawings
- Ergonomics for Carpenters
- Fall Protection
- Firestop Installation
- Fork Lift Operation
- Framing
- Framing Square
- Green Building
- Hardwood Floor Layers/Floor Sanding & Finishing
- Hardwood Flooring
- Hazardous Waste General Site Worker
- Installation of Strip Floors
- Insulation Installation
- Layout Instruments
- Lead Abatement
- Managing safety at the worksite
- Material Safety Data Sheets (MSDS)
- Metrics In Construction
- Pile Driving Setup and Operations
- Rigging
- Roofs
- Safe working conditions
- Scaffolds
- Shaft Liner Construction
- Solid Surface Materials Installation
- Stairs
- Steel Framing
- Superintendent/Leadership Training
- Suspended Ceilings and Soffits
- Welding
- Working Drawings
- Working with gas turbines for millwrights
- Working with pumps for millwrights

**CONTINUOUS IMPROVEMENT**
- Team skills
- Team leader skills

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

**Class/Lab Hours**
8-200

**Job Numbers 3 and 4: Apprentices/Veteran Apprentices**

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

**Carpenter Apprentice**
- Foundations & Floors
- Blueprint Reading - Basic
- Wood Framing
- Concrete Formwork
- Exterior Finish
- Blueprint Reading - Advanced
- Concrete Bridge Building
- Interior Finish
- Concrete Structures/Equipment/Safety/Green Technologies
- Rigging
- Layout Instruments
- Engineered Structural Systems
- Commercial Steel Framing
- Commercial Door Hardware
- Stair Building
- Roof Framing
- Introduction to Welding & Cutting

**Drywall/Lather Apprentice**
- Drywall/Lathing, Trade Safety
- Basic Applications
- Mathematics Review
- Commercial Framing Systems and Fire Stop
- Doors, Frames, Hardware & Windows
- Blueprint Reading I
- Blueprint Reading II
- Applied Blueprint Technology
- Welding (Heavy Plate)
- Welding (Light Gauge)
- Residential Metal Stud Framing
- Exterior Systems & Trims
- Interior Metal Lath Systems
- Shaft Protection & Ceiling Systems
- Arches, Furring & Advanced Systems
- Advanced Construction Techniques

**Insulator Apprentice**
- Construction Math, Intro to Working Drawings for Insulators, Firestop,
- Residential Blueprint Reading for Insulators, Fork Lift, Driver Safety Training
- Residential Insulation Installation and Weatherization
- Commercial Blueprint Reading for Insulators, Welded Frame-Mobile Tower Scaffolds
- Commercial & Industrial Insulation Installation, Aerial Lift
- Energy Conservation Codes and Standards for Insulators
- Green Advantage
- CalGreen

**Pile Driver Apprentice**
- Worker Safety & Tool Skills for Pile Drivers - Fall Protection
- The Pile Driver Apprentice & The Trade, Construction Math
- Rigging
- Concrete & Formwork
- Welding 1 - SMAW (Shielded Metal Arc Welding) 1F, 2F, 3F, 4F
- Introduction to Pile Driving Land & Water - Aerial Lifts
- Welding 2 - SMAW 1G, 2G - Fork Lifts
- Advanced Pile Driving - Land & Water
- Wharfage & Marine Structures
- Welding 3 - SMAW 3G Certification
- Introduction to Structural Blueprints & Layout Instruments
- Bridge Building & Advanced Structural Blueprints
- Falsework, Shoring & Heavy Timber Framing
- Advanced Formwork
- Welding 4 - SMAW 4G Certification
- Welding 5 - FCAW 3G Certification
- Welding 6 - FCAW 4G Certification

**Shingler Apprentice**
- Blueprint Reading - Basic, Union Benefits Presentation
- Flashing, Shakes & Composition
- Blueprint Reading - Advanced
- Shingles, Sidewalls, Tile & Metal
- Rigging

**Acoustical Installer Apprentice**
- Blueprint Reading - Basic, Union Benefits Presentation
- Commercial Steel Framing
- Installation of Exposed & Concealed Grid Ceilings
- Welded Frame & Mobile Tower Scaffold
- Special Ceiling Systems, Aerial Lift.
- Introduction to Welding & Cutting
- Access Floor Systems
- Integrated Ceilings & Special Techniques
- Blueprint Reading - Advanced
- Layout Instruments

Hardwood Floor Layer Apprentice
- Tools of The Trade, Installation of Wood Floors
- Athletic Floors, Finishing & Repairing Floors
- Blueprint Reading - Basic, Union Benefits Presentation
- Blueprint Reading – Advanced

Millwright Apprentice
- Millwright 16 Hour Safety & Millwright Tool Skills
- The Millwright Apprentice & The Trade
- Math Applications - Fall Protection
- Rigging
- Materials of Construction
- Layout Procedures - Fork Lift (Industrial & Rough Terrain)
- Optical Instruments
- Blueprint Reading - Aerial Lift
- Cutting & Welding 1
- Welding 2 - SMAW
- Monorails
- Conveyors
- Installation of Machinery
- Maintenance of Machinery
- Precision Tools & Shaft Alignment
- Turbines
- Welding 3 – Certification

Scaffold Erector Apprentice
- Introduction to Scaffolds - Confined Space
- Welded Frame & Mobile Tower Scaffold
- Blueprint Reading - Basic, Union Benefits Presentation
- System Scaffold
- Hazard Awareness - Aerial Lift
- Blueprint Reading - Advanced
- Suspended Scaffolds, Shoring Systems
- Tube & Clamp Scaffold
- Layout Instruments
- Blueprint Reading for Scaffold Erectors
- Rigging
- Introduction to Welding & Cutting
- Welding
Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery
Training Proposal for:
District Council 16 Northern California Journeymen and Apprentice Training Trust Fund

Agreement Number: ET19-0914

Panel Meeting of: July 27, 2018

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

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprenticeship</td>
<td>Construction</td>
</tr>
<tr>
<td>Priority Rate</td>
<td>Green Technology</td>
</tr>
<tr>
<td>Retraine</td>
<td>Priority Industry: Yes No</td>
</tr>
<tr>
<td>Veterans</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statewide</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 Various Local Unions (17 in total) Painters Union Locals No. 3, 83, 272, 376, 487, 507, 567, 741, 913, and 1176; Floor Covering Locals No. 12, 1237; Glaziers Locals No. 169, 718, 767, 1621, and Mixed Trades Local No. 294</td>
<td>≤20%</td>
</tr>
</tbody>
</table>

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>$1,642,048</td>
<td>$113,728</td>
<td>$1,755,776</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></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Priority Rate Journeymen</td>
<td>Commercial Skills, OSHA10/30</td>
<td>200</td>
<td>8-200</td>
<td>0</td>
<td>$1,112</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Apprentice Painters &amp; Drywall Finishers</td>
<td>Commercial Skills, OSHA10/30</td>
<td>360</td>
<td>8-210</td>
<td>0</td>
<td>$1,976</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Apprentice Floor Covering Installer</td>
<td>Commercial Skills, OSHA10/30</td>
<td>100</td>
<td>8-210</td>
<td>0</td>
<td>$1,976</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Apprentice Glaziers</td>
<td>Commercial Skills, OSHA10/30</td>
<td>300</td>
<td>8-210</td>
<td>0</td>
<td>$1,976</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Apprentice Veterans - All Trades</td>
<td>Commercial Skills OSHA10/30</td>
<td>16</td>
<td>8-210</td>
<td>0</td>
<td>$1,976</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** SET Priority Industry: $22.77 per hour.

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

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

To meet the post-retention hourly wage of $22.77, up to $1.85 for Job Number 2; up to $3.88 for Job Number 3; and up to $4.79 for Job Numbers 4 and 5. Health benefits are per collective bargaining agreement.

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journeymen All Trades</td>
<td></td>
<td>200</td>
</tr>
<tr>
<td>Apprentice Painter and Drywall Finisher</td>
<td></td>
<td>360</td>
</tr>
<tr>
<td>Apprentice Floor Covering Installer</td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>Apprentice Glazier</td>
<td></td>
<td>300</td>
</tr>
<tr>
<td>Veteran Apprentice – All Trades</td>
<td></td>
<td>16</td>
</tr>
</tbody>
</table>

INTRODUCTION

The District Council 16 Northern California Journeymen and Apprentice Training Trust Fund (DC16 JATTF) ([www.dc16apprentice.org](http://www.dc16apprentice.org)) was formed in June of 2006. The JATTF is comprised of three formerly separate training trusts that have been merged into one in order to consolidate expenses and focus revenue on training and infrastructure. District Council 16 covers four “master” collective bargaining agreements representing four trades: Floorcovering Installers, Painters, Glaziers, and Drywall Finishers.
DC16 JATTF provides funding for three separate apprenticeship programs, for the four trades identified above. Each is registered with the Division of Apprenticeship Standards (DAS) as outlined below:

1. Northern California Floor Covering JATC (DAS #04789)
2. Northern California District 16 Glaziers, Architectural Metal and Glass Workers JATC (DAS #000370)
3. Painter & Decorating JATC of the Bay Area, Inc. (DAS #00040 and #00076) [Note: Painter & Decorating JATC is one sponsor covering two programs for the allied occupations of Painters & Decorators and Tapers.]

There are currently more than 515 signatory employers organized under four trade associations for purposes of bargaining. It is anticipated that an estimated 30% of the signatory employers will participate in this project, of which approximately 70% are small businesses. Employer contributions are being made to DC JATTF on behalf of 5,805 Journeymen and 1,200 Apprentices within California.

DC16 JATTF is administered by four union trustees and four employer trustees, one from each of the four trades. DC16 JATTF operates a 100,000 square foot training center in San Leandro and an 11,000 square foot training center in Sacramento. Training will occur at both centers.

This is the fourth ETP Agreement between ETP and DC16 JATTF in the last five years. This is the second time a Veterans component has been included.

The JATTF’s request for a substantial increase in funding over prior contract is a result of the following factors:

- The first-time request for funding of its Journeymen training program;
- An expansion of the number of registered Apprentices across all 4 programs;
- All of the four trades represented are in the process of adding an extra year to their classroom training programs. (e.g. New apprentice painters will have five years of classroom training, not four years);
- A significant increase in employer demand.

**Employer Demand**

New residential and commercial building construction is driving demand for workers. In addition, home improvement and remodeling projects are expected to create jobs as existing homes and commercial buildings age and need retrofitting and repair. DC16 JATTF will train Apprentice and Journeymen Painters, Drywall Finishers, Glaziers and Floor Covering Installers to prepare them to work on projects like the following:

- Santa Rosa Junior College Burbank Auditorium
- Colleges of Marin, multiple sites
- Marin General Hospital
- BioMarin, multiple sites
- Santa Rosa Hyatt
- Sonoma County Detention Facility
- Marin Water District Clarifiers
- Sausalito Sanitary District upgrades
- Sonoma County Court House
- Eureka Juvenile Hall
- Eureka Airport
- Humboldt Bridge Repaint
- State of California Buildings O & P, Sacramento
- Cache Creek Casino Hotel Expansion, Esparto
- Sacramento Regional Waste Water Treatment Plant, Elk Grove
- Rio Vista Bridge, Rio Vista
- Jiboom Street Bridge, Sacramento
- Kaiser Riverside, Roseville
- UC Davis Projects, Lecture Hall, Fitness Center & Davis Center
- Tuolumne County Courthouse, Sonora
- UC Davis Medical Center North Tower
- California High Speed Rail
- UC Merced 2020 project
- Clovis Community Hospital
- Tulare County Detention Facility (Porterville)
- Fresno Surface Water Treatment Facility
- Matilda Torres High School Complex (Madera)
- Chawanakee K thru 8 (Madera)
- Merced Mental Health Facility
- UC Merced Downtown Center
- Tulare Wastewater Treatment Facility
- Selma Police Department Headquarters
- Cal Poly Student Housing and New Cafeteria
- Lucile Packard Children’s Hospital in Palo Alto
- Stanford Hospital facilities in Palo Alto
- Apple Campus in Cupertino
- Google campus in Sunnyvale
- Diridon Station downtown San Jose
- Oakland Global Logistics Center
- Brooklyn Basin
- Lennar tower at 1900 Broadway in Oakland, 33 stories
- MacArthur Transit Village, 25 stories
- 1911 Telegraph Avenue in Oakland, 27 stories
- 1700 Webster St. in Oakland, 23 stories
- 1721 Webster St. Oakland, 25 stories
- 1640 Broadway in Oakland, 28 stories
- 2201 Valley St. in Oakland, 27 stories
- 601 12th St. City Center in Oakland, 24 stories
- Salesforce Tower
- 181 Fremont
- 41 Tehema
- Transbay Terminal
- Grand Hyatt SFO
- 5M Development
- Chase Center/Warriors Arena
- Parkmerced
- Mission Rock/Pier 70
- Candlestick Point/GIANTS, phase 2
- Treasure Island
- Millbrae Bart
Apprentice Pilot

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements 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: 48 months for Tapers; 60 months for Painters, 48 months for Floor Covering Installers (aka Carpet, Linoleum, & Soft Tile Layers); and 60 months for Glaziers.

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

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5, reducing the priority industry rate from $26 to $21 per class/lab hour. The ETP wage for Apprentices and Journeymen is no less than $22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel’s information.

Veteran Apprentice

DC16 JATTF 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), a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades. Veterans who qualify and apply for an apprenticeship can skip the first stage (the written assessment) and go directly to the second stage (the interview).

The JATTF also participates in the new Painters Apprenticeship Training (PAT) (http://pat-vp.org/?page_id=693 ) entry program. The JATTF sets up training for active military members who are about to leave the military. After trainees go through PAT, they have direct entry into the JATTF’s program.

PROJECT DETAILS

Training is scheduled to commence in August at facilities in San Leandro and Sacramento. The trades have added new curriculum topics as a result of technology upgrades. There are 8 full-time trainers who will assist with the training. The trainers are former or current DC16 JATTF workers and are experts in their field.

Green/New Materials and Technology

DC16 JATTF’s training programs emphasize skills training for both Journeymen and Apprentices in green technologies, advanced equipment operation, and new materials. For example, today’s workers must learn to work with many recycled and energy-saving materials. The installation and maintenance of these new green floorcoverings, wallcoverings, and glass require different skills than in the past. Examples of new coursework includes:

- EcoQuip and Vapor Abrasive Blasting equipment which generates less dust and uses less water and media than traditional wet blasting equipment.
- Spider cranes can collapse and expand to allow plate glass to move through the internal space of building. In the past, the glass would have been moved externally.
- Concrete floor polishing creates a finished floor surface using less resources and lasts longer than previous methods.
- Safeway QuikDeck and Safespan bridge platform systems help industrial bridge painting be more safe and efficient.
- Silica training will teach trainees to identify existing and foreseeable respirable crystalline silica hazards in the workplace and take or report prompt corrective measures to eliminate or minimize hazards. Currently this is not a certification program, but trainees will be awarded a silica training card. This card will be necessary to work on certain construction projects.
- Synthetic turf training, the newest generation of turf, is created from recycled plastics. Trainees need to learn to work with the synthetic turf efficiently and safely.
- Total Station Device, an electronic/optical instrument used in modern surveying and building construction, is integrated with an electronic distance meter to read slope distances from the instrument to a particular point. This skill is necessary to ensure a project such as a multi-story building is laid out correctly before construction begins.
- A Refinery Safety Overview 24-hr training class ensures workers meet safety requirements to perform work at the refineries.

**Journeyman Training**

**Commercial Skills** Many of the proposed classes were not in place at the time trainees went through their apprentice programs or if they were offered, the class level was for workers with less work experience. The introduction of new green products also requires new kinds of classes for journeymen. Below is a brief list of the specifics of each trade’s skill needs:

Glaziers need to learn advanced techniques to install, remove, and cut many different glass products for both commercial and residential projects. They also need upgraded skills to complete building and room layouts.

Drywall finishers (aka Tapers) need more knowledge about how to apply specialized finishes in a wide variety of construction situations.

Floor Covering Installers need to be more skilled at scribing, self-leveling, heat welding and seaming, especially when working with new materials and methods. Skills are needed in new green products and adhesives demanded by project designers.

Painters need to improve their skills related to removing, specializing, and creating using paints, stains, and coatings on interior and exterior walls, new buildings, and other structural surfaces. Painters also need improved skill levels in applying materials to manufactured products, such as furniture, toys, pottery, trucks, buses, boats, airplanes, bridge surfaces, and refinery surfaces.

**Apprenticeship Training**

**Commercial Skills**

Glaziers will learn to use the tools and equipment of the trade; handle, measure, cut, and install glass and metal framing; cut and fit moldings; and install and balance glass doors. Training will also cover blueprints and specifications for size, color, type, and thickness of glass to be used.

Drywall installers will learn to mount walls and ceilings securely and safely; spread multiple coats of spackle over cracks, indentations, and any remaining imperfections; and use a mechanical
applicator, a tool that spreads sealing compound on the wall joint while dispensing and setting tape at the same time. They also apply special faux finishes using a variety of specialized techniques.

Floor Covering Installers must be skilled in scribing, self-leveling, heat welding and seaming. They must also learn how to measure according to blueprints or drawings; prepare working areas for coverings; glue down borders, carpet, linoleum and new green floor coverings; and work on different areas such as stairs and internal and external spaces.

Painters apply, remove, specialize, and create paints, stains, and coatings to interior and exterior walls, new buildings, and other structural surfaces. Painters may also apply materials to manufactured products, such as furniture, toys, and pottery, as well as transportation equipment including trucks, buses, boats, and airplanes.

**OSHA 10/30**

Certified Safety Training

OSHA 10/30 will be offered to both Journeymen and Apprentices. This training is a series of courses “bundled” by industry sector and occupation. The coursework is geared to construction work. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Curriculum Development

The training curriculum was developed by DC16 JATTF with input from both union and employer representatives and customized to address the needs of its members, participating employers, and the industry. Feedback comes directly from employer and union representatives based on workplace performance, as well as student course evaluations.

Class/Lab Trainer-to-Trainee Ratio

While the majority of classes will be provided at the standard class/lab ratio of 1:20 for Journeymen, DC16 JATTF is requesting a 1:25 ratio. Class/lab training at the training centers is typically conducted with a trainer-to-trainee ratio of less than 1:20. However, scheduling classes at an exact ratio is difficult because Journeymen may not be available at a particular time and date. If trainees cannot get into a particular class and maintain their work schedules, they may have to wait six months to a year before that class is offered again.

Impact/Outcome

Potential certifications which could be earned for the Journeyman and Apprenticeship training listed in the proposed curriculum include: Green Advantage Curtainwall Installer Certification, the Carpet Installer’s Certification, various Welding certifications, OSHA 10/30, Booms and Lifts, Confined Space, Hazardous Waste Operations and Emergency Response, Spider Crane Operator, National Commission of Crane Operators (NCCO), Flagging and Traffic Control, Total Station, 24 Hour Lead, Repair, Remedial and Prevention, Swing Stage, and Rigging. All of these certifications are in high demand with area employers. All apprentices who complete the program receive completion certificates from the Division of Apprentice Standards and the Department of Labor.
Commitment to Training

Each of the signatory employers contributes to the education training fund. DC16 JATTF certifies that signatory employers will continue to pay into their respective trust funds for both apprentice and journeymen training. ETP funds supplement and do not displace employer contributions to training. DC16 JATTF represents that safety training is, and will continue to be, provided by the participating employers in accordance with all requirements under state and federal law.

Marketing and Support Costs

DC16 JATTF is requesting 8% in support costs to fund marketing to employers; to recruit apprentices; and to conduct ongoing assessments of employer-specific job requirements. There are five staff people in the DC16 offices that will assist with the marketing, recruitment, needs assessments and scheduling of training.

DC16 JATTF and the various local unions will publicize the availability of training through direct mailings, brochures/flyers, personal contacts, telephone calls, public service announcements and e-mail announcements. It will also promote this training program at labor-management meetings and industry assemblies; and site visits to local schools, trade shows, and vocational outreach organizations. Staff recommends the 8% in support costs.

➤ Training Infrastructure

The Training Director and DC16 JATTF’s five administrative staff assist in ETP administration including scheduling of training and collection of rosters. Training attendance is kept by each instructor and passed to the administrative staff at the two training sites. The enrollee and employer data, demographics, training hours attended, and work hour data is then sent to Strategy Workplace which uploads the data to ETP websites.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by DC16 JATTF 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>ET16-0926</td>
<td>$949,048</td>
<td>05/31/2016–05/30/2018</td>
<td>776</td>
<td>714</td>
<td>165</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 73,522 reimbursable hours have been tracked as of June 13, 2018 sufficient to support earnings of over 100%. All training will be completed by the July Panel meeting. The Contractor projects final earnings of 100% based on high employment rates in the geographic area served by the JATC.
PRIOR PROJECTS

The following table summarizes performance by DC16 JATTF 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>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0922</td>
<td>Statewide</td>
<td>1/28/2013 – 1/27/2015</td>
<td>$352,698</td>
<td>$352,698 (100%)</td>
</tr>
<tr>
<td>ET15-0912</td>
<td>Statewide</td>
<td>9/02/2014 – 9/01/2016</td>
<td>$445,172</td>
<td>$445,172 (100%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

California Labor Federation in Sacramento and Strategy Workplace Communications in Burlingame 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)

Journeymen Training

Trainees may receive any of the following:

COMMERCIAL SKILLS

All Trades
- Booms & Lifts
- Confined Space
- Emergency Response
- Fall Protection
- Flagging & Traffic Control
- Focus 4/Hazardous-Communications
- Hazardous Waste Operations
- Refinery Safety Overview
- Renovation Repair Painting, Lead Renovation & Repair
- Rigging
- Scaffold
- Scaffolds, Ladder Safety & Fall Protection
- Silica Training
- Survival of the Fittest
- Swing Stage Certification
- Welding

Drywall Finishers
- Drywall Repair-Texture Match
- Drywall Textures Spray Techniques
- Drywall Venetian Plastering
- The Graco Mark 5

Floorcovering Installers
- Carpet Stair Work
- Concrete Floor Grinding/Polishing
- Conventional Carpet
- Cove Pattern
- Heat Welding
- Scribing
- Synthetic Turf
- TEC-TALK-Moisture Mitigation & Floor Prep

Glaziers
- Glazing Blueprint & Layout
- Glazing Door Hardware/Panics
- Rigging & Hoisting “A”
- Rigging & Hoisting “B”
- Spider Crane Training
- Total Station A (Intro & Math)
- Total Station B (Coordinate (x-y-z))
- Total Station C (Coordinate & Layout)
- Total Station D (Coordinate & Layout II)
- Welding Certification 101

**Painters**
- Advanced Faux Finishes
- Advanced Wall Covering
- CAS (Certified Application Specialist) Training “B”
- CAS (Certified Application Specialist) Training “C”
- CAS (Certified Application Specialist) Training “A”
- Drywall Repair for Painting Industry
- EcoQuip and Vapor Abrasive Blasting Equipment
- Green Advantage Curtainwall Installer
- Intro to Faux Finishes
- Intro to Spray Techniques
- Intro to Wall Covering
- Lead Refresher
- Safeway QuikDeck and Safespan Bridge Platform Systems
- Spray Techniques II
- 24 Hour Lead, Repair, Remedial and Prevention

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

**Class/Lab Hours**
8-210 (Job Numbers 2-5) **Apprenticeship Training**

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

Drywall Finishers Job Numbers 2 & 5:

2nd Year and above
- Advanced Applications, Level 1,2,3
- Advanced Materials Applications
- Blue Prints/ Job Economics
- Commercial/Residential Spec Finish
- Commercial-Residential Applications
- Drywall Finishes and Surface Prep
- Drywall Finishes Old/New Walls
- Final Projects
- Levels of Finish
- Special Finishes
- Spray-Hand Fin & Texture Paint
Painters Job Numbers 2 & 5:

2nd Year and above
- 24-Hour Lead
- 24-Lead and 8-RRP
- Abrasives, CAS Intro
- Advanced Spraying/SSPC C12 (new)
- Blasting Techniques (new)
- Coating Failure Analysis
- Coatings (new)
- Color, Mix & Match
- Contractor Quality Management
- Faux Finishes
- Final Exam
- Industrial Deleading/SSPC C3 (new)
- Instruments and Testing Fundamentals
- Preparing for Blasting (new)
- Specialty Applications (new)
- Spray All/Safety and Technology
- Spray Applications (new)
- Wallcovering, Estimating and Installing

Floorcovering Installer Job Numbers 3 & 5:

2nd Year and above
- Blue Prints and Plans
- Carpet (basic)
- Carpet Sewing and Stair Work
- Cove Installation
- Exit Examination
- Floor Preparation
- Heat Welding
- Knifing Skills and Flat Pattern
- Laminate, Prefinished Hardwood and Specialty Tile
- Review Flat Pattern and Intro to Coving
- Scribe and Seams (Hard Surface)
- Specialty Projects or Finish Exit Examination
- Stair Treads and Vinyl Composition Tile at Angle
- Synthetic Turf
- Vinyl Composition Tile

Glaziers Job Numbers 4 & 5:

2nd Year and above
- Center for Construction Research and Training
- Curtain Wall System
- Door Hardware
- Fabrication & Layout Techniques
- Finals
- Floor Closer and Shower Doors
- Hardware
- Intro Solar and Energy Efficient Systems
- Intro to Solar Install & PV Systems
- Longs Drugs and Projects
- Mirrors & Shower Doors
- Putty Glazing & Scaffold
- Shop Drawings, Caulking & Sealants
- Storefront
- Transits and Levels
- Welding

**All Job Numbers:**
- First Aid/CPR
- Silica Training

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

---

**Note:** Reimbursement for retraining is capped at 200 total training hours for Job Number 1 and 210 total training hours for Job Numbers 2-5 per-trainee, regardless of method of delivery.
### Training Proposal for:

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

**Agreement Number:** ET19-0913

**Panel Meeting of:** July 27, 2018

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

**Analyst:** D. Woodside

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraining</th>
<th>Priority Rate</th>
<th>Apprenticeship</th>
<th>Veterans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector:</td>
<td></td>
<td></td>
<td>Construction</td>
<td></td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Statewide</th>
<th>Repeat Contractor: Yes</th>
<th>No</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Yes</th>
<th>No Laborers International Union Locals 73, 185, 261, 270, 294, 304, 324 and 1130</th>
</tr>
</thead>
</table>

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

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

### FUNDING DETAIL:

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>$888,480</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Costs</td>
<td>$61,335</td>
</tr>
<tr>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total ETP Funding</th>
<th>$949,815</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
<th>50% of Total ETP Funding Required</th>
<th>Inherent</th>
</tr>
</thead>
</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>Journeyman Priority Rate Retrainee</td>
<td>Commercial Skills, Business Skills, OSHA10/30</td>
<td>145</td>
<td>8-200 0</td>
<td>$667</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 24</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Apprentice Retrainee</td>
<td>Commercial Skills, OSHA10/30</td>
<td>450</td>
<td>8-210 0</td>
<td>$1,796</td>
<td>$19.20</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 80</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Apprentice Veteran Retrainee</td>
<td>Commercial Skills, OSHA10/30</td>
<td>25</td>
<td>8-210 0</td>
<td>$1,796</td>
<td>$19.20</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 80</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:**  
- Job Number 1 (SET/Priority Industry): $22.77 per hour
- Job Numbers 2 & 3 (Collective Bargaining Agreement): $19.20 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 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>Journeyman Construction Craft Laborer</td>
<td>145</td>
<td></td>
</tr>
<tr>
<td>Apprentice Construction Craft Laborer</td>
<td>450</td>
<td></td>
</tr>
<tr>
<td>Veteran Apprentice Construction Craft Laborer</td>
<td>25</td>
<td></td>
</tr>
</tbody>
</table>

## INTRODUCTION

In 1995, the Northern California District Council of Laborers (representing labor) and the Associated General Contractors of California (representing employers) created the Laborers’ Training and Retraining Trust Fund for Northern California and the Laborers’ Joint Apprenticeship Training Center (No CA Laborers JATC). Today, the JATC serves eight Northern California Laborers Union Locals (73, 185, 261, 270, 294, 304, 324 and 1130), representing 29,000 journeymen and 3,400 apprentices who work as construction craft laborers.

This is the JATC’s fourth ETP Agreement. The additional funding is driven by the demand of the construction industry for skilled Apprentices and Journeyman Construction Craft Laborers in Northern California. Specifically, the JATC needs to train more Apprentices to meet employer demand. The JATC reports that the number of apprentices has doubled in the previous two-year period.
Employer Demand

Training will expand laborers’ skills in preparation for current and upcoming construction projects in Northern California. This includes waste water treatment plants, freeway overpasses and bridges, asphalt rehabilitation on major highways, and significant hospital and school construction projects. Specific projects include the PG&E pipeline upgrades, High Speed Rail and BART Extension into San Jose, the Apple Computer and Facebook Campus upgrades, and the new Sacramento Soccer Stadium. Additional construction projects include the Highway 99 Realignment from Madera to Fresno, a new prison in Tuolumne County, a new VA hospital in Stockton, a new casino in Wheatland (between Sacramento and Marysville) and a new hospital in Redding.

Funding will primarily support apprenticeship training. Many of the types of construction (pouring concrete, laying asphalt, installing storm drains and water mains, working on bridges and driving tunnels) are learned at the Laborers Training Center in San Ramon. Apprentices then go to worksites to practice their new skills.

Training will also be provided to Journeymen. Overall, employers are experiencing an increase in the complexity of construction projects requiring retraining for experienced employees. Under this proposal, Journeymen will expand their green skills and receive employer-driven certification classes such as: green construction awareness, weatherization and OSHA 10/30. Trained workers keep projects on-time and on-budget, and reduce injuries.

Apprenticeship Program

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 proposal, the program is two years in length.

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

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5, reducing the priority industry rate from $26 to $21 per hour. Journeymen training is reimbursed at the priority industry retraining rate of $26 per hour. The ETP wage Journeymen trainees is no less than $22.77 per hour. The actual wage per collective bargaining for Apprentices (Job Numbers 2 & 3) is the minimum required wage for this proposal.

Veteran Apprentice

These trainees are in a separate Job Number to better track performance toward the goal of improved outreach for Veterans. Veterans who apply for an apprenticeship receive direct entry into the program, which includes free training and assistance in finding work with employers throughout the area.

The JATC is committed to supporting job-related training that helps Veterans transition into the California workforce. No CA Laborers JATC recruits Veterans in cooperation with Helmets-to-
Hardhats, a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades.

First-Year Apprentices

The JATC requests that first year Apprentices be allowed to participate in training. The Laborers Apprenticeship Program is unique from other trades, as it does not separate the apprentices into different levels depending on their year. Instead trainees are allowed to select from different sets of courses that correspond to their skill level and previous work experience. For instance, a trainee can be a first year in course work, but be a second year in work status; or, on the other hand, a trainee can be a second year in course work, but a first year in work status. The JATC gives credits for work or course experience. Hence the distinction between first and second year apprentices is unclear, making eligibility for the ETP program difficult to determine.

The No CA Laborers JATC apprenticeship program is for those workers with little or no experience in the construction trades who want to begin a career as a Construction Craft Laborer. It is a two-year program and many graduates go on to train in more highly skilled construction trades. The JATC has strong ties to local government and non-profit organizations and their pre-apprenticeship programs. These programs, such as City Build (San Francisco Office of Workforce Development), Northern California Construction Training (Sacramento and Yolo Counties), Project Stripe (Sacramento County), Cypress Mandela Training Center (Oakland and Alameda County), and Youth Build (San Joaquin County) serve as pathways to the JATC’s program providing local hires, minorities, and other under-served individuals with the opportunity to gain skills to enter and successfully complete a trades apprenticeship.

PROJECT DETAILS

Training Plan

All training is center-based and will be conducted at the San Ramon Training Center and other designated training facilities throughout the Central Valley, Northern California, and San Francisco Bay Area.

Journeyman Training

Commercial Skills: Laborers will learn about photovoltaic installation concepts, mechanical integration and solar dynamics, and weatherization to meet clean energy standards. Training will also include higher cutting, welding and pipe layout techniques. Laborers with a Mechanical Pipe II certification must acquire a Mechanical Pipe IV certification to learn how to place pipes onto panels for reverse osmosis water treatment systems.

Business Skills: Training will assist Journeymen to follow certification guidelines; use more collaborative bidding and project development practices; interact with other types of construction workers; and implement green solutions in traditional work environments. Trainees will gain the skills to plan, organize, and manage construction projects resulting in more efficient and on-time work. Training will also include team-building and leadership skills to lead and participate in teams effectively.

OSHA 10/30: Laborers often work outside lifting and transporting heavy materials. Thus, the potential for injury or even death for themselves and bystanders is significant. Many employers require that workers take these classes before they are allowed on a worksite.
Apprenticeship Training

Commercial Skills: Apprentices will learn to set up, build, and maintain commercial, industrial and residential construction sites. Training will also include building scaffolding, laying pipes, removing and replacing concrete, welding, using air tools, and driving skid steers and forklifts.

Although a laborer’s work is usually outdoors, a large number of tunnel projects in Northern California necessitate that Apprentices gain new skills to work in enclosed areas. This work is physically demanding because of long hours of using tools and machines while bending, sitting, climbing, standing, and crouching in small spaces. Trainees will also take classes on how to work around, and safely remove, hazardous waste, lead and asbestos.

OSHA 10/30: Training is a series of courses “bundled” by industry sector and occupation. The coursework must be approved by, and the instructors must be certified by Cal-OSHA. OSHA 10/30 is not included in the 10% limitation on safety training. Completion of the training results in a certificate that expands employment opportunities.

The work done by construction craft laborers is conducted outside, year-round, and involves hand/eye/foot coordination, finger dexterity and heavy lifting. Improper use of equipment and unsafe transport of material can lead to immediate injuries or future chronic injuries. Therefore, laborers require additional training to perform their work efficiently and safely.

Curriculum Development

The JATC, with input from both labor and management representatives, customized the Laborers International Union of North America (LIUNA) curriculum to address the local needs of its members, participating employers and industry. The LIUNA was directly involved in the development of the apprenticeship curriculum. In addition, local hiring demands have shaped the curriculum and course offerings. The local hiring demands of Northern California have helped to shape the Journeymen curriculum, such as the need for laborers with the ability to work with green materials and on more technically advanced construction projects. Feedback comes directly from the employers, based on workplace performance, requests of customers, needs of the industry as well as course evaluations that are completed by students.

Impact/Outcome

ETP funds will expand the Journeyman training program and the Apprentice classes, which will include the addition of employer-driven certification classes. Certifications to be earned include: OSHA 10, OSHA 30, Rigging and Lifting, Traffic Control, Flagging, Hazardous Waste Removal, Scaffold User, Scaffold Builder, Confined Space, Forklift and Welding.

Commitment to Training

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

Five JATC staff will assist in ETP administration including marketing, recruitment, and needs assessments. The JATC staff will also coordinate training scheduling and have retained Strategy Workplace to assist. Training will be delivered by in-house experts.

Marketing and Support Costs

Nor Cal Laborers JATC is requesting 8% in support costs to fund recruitment and conduct ongoing assessments of employer-specific job requirements. The JATC and the eight union locals publicize training through their websites, newsletters, direct mailings, brochures/flyers, personal contacts, telephone calls, public service announcements and e-mail announcements. It will promote this training at labor-management meetings and industry assemblies, site visits to local schools, trade shows, industry meetings, and vocational outreach organizations. Staff recommends the 8% in support costs.

Tuition Reimbursement

Apprentices 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.

Trainer-to-Trainee Ratio

While the majority of both journeymen and apprentice classes will be provided at the standard class/lab ratio of 1:20, the JATC is requesting a waiver that this ratio be expanded to 1:25 for all trainees including Journeymen.

The JATC is requesting a trainer-to-trainee ratio of 1:25 for both Journeymen and Apprentices. Scheduling classes at an exact ratio is difficult because Journeymen and Apprentices work full-time and may not be available to attend classes as readily at a particular time and date. If trainees cannot get into a particular class and maintain their work schedules, they may have to wait six months to a year before that class is offered again. Because of the unique structure of JATC training serving individuals who work many hours and then have to commute to a training center, staff recommends that the waiver request be granted. The JATC estimates that less than 10% percent of training will require the 1:25 ratio.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by Nor Cal Laborers 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>ET17-0901</td>
<td>$530,512</td>
<td>08/01/16-07/31/18</td>
<td>551</td>
<td>915*</td>
<td>0</td>
</tr>
</tbody>
</table>

*This number reflects the Number of Trainees completing the minimum of 8 hours of training; final payment will most likely reflect 282-300 trainees completing training and retention. Based on the ETP Online
Tracking system, there are 25,160 reimbursable hours as of June 7, 2018 for potential earnings of $402,226 (over 75% of the approved Agreement amount). The Contractor projects final earnings of 100%. Trainees are in the process of completing their retentions.

PRIOR PROJECTS

The following table summarizes performance by No CA Laborers JATC 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>ET15-0908</td>
<td>Statewide</td>
<td>09/02/14 – 09/01/16</td>
<td>$269,744</td>
<td>$269,744 (100%)</td>
</tr>
<tr>
<td>ET13-0908</td>
<td>Statewide</td>
<td>10/08/2012–10/07/2014</td>
<td>$327,548</td>
<td>$324,746 (99%)</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)

Trainees may receive any of the following:

Journeyman

COMMERCIAL SKILLS
- Aerial Boom Lift
- Aerial Platform
- Aerial Work Platform Initial
- Aerial Work Platform Recertification
- Air Tools
- Arc Welding
- Area and Volume, Calculating and Estimating
- Asbestos Abatement Worker
- Asbestos Awareness
- Asbestos Contractor/Supervisor Initial
- Asbestos Initial
- Asbestos Removal Initial Class
- Asbestos Recert
- Asbestos Removal Recertification
- Asbestos Contractor/Supervisor Recertification
- Asphalt Paving Techniques
- Asphalt Remove & Replace Builders Level Math
- Basic Computer Skills Orientation
- Basic Construction Math
- Blasting and Coating Operator Qualification (OQ)
- Blue Print Reading
- Blue Print Reading - Basic
- Blueprint Reading - Intermediate
- Boom Lift Safety
- Brick Tender Fundamentals
- Brick Tending
- Bulkheads, Batter Boards, Overhead Screed
- Commercial Green Construction Awareness
- Competent Person
- Concrete and Asphalt
- Concrete Coring & Saw Cutting
- Concrete Finisher
- Concrete Placement and Finishing, Floors, Drives and Walk Behind Power Trowel
- Concrete Techniques
- Confined Space Awareness
- Confined Space Entry
- Construction Craft Laborer
- Demolition and Deconstruction Awareness
- Drilling - Horizontal Directional Drilling
- Drilling Air Track Orientation
- Drilling Air Track Advanced
- Drilling Directional
- Environmental Hazards of Highway Work
- Environmental Passport
- Excavation Competent Person
- Fall Protection
- Fire Watch
- First Aid/CPR
- Flagging
- Forklift and Forklift Safety
- Forklift Orientation Initial
- Forklift Orientation Recertification
- Form Setting, Curb and Gutter, Alley Gutter, Pour in Place Walls
- Fractions and Decimals, Inches to Decimals
- Form Setting, Sidewalk, Driveway, Approach, Handicapped Ramp
- Fundamentals of Construction
- Grade Checking Orientation
- Hand & Power Tools
- Hazardous Waste Awareness
- Hazardous Waste Initial
- Hazardous Waste Removal Initial
- Hazardous Waste Recert
- Hazardous Waste Removal Recertification
- Hazardous Waste Worker
- Hazworker 40
- Hoisting and Rigging
- Jobsite Erosion Control
- Laborer’s Supervisor
- Landscape 1: Planting & Maintenance
- Landscape 2: Construction Math & Irrigation Systems
- Landscape 3: Erosion Control, Grading & Drainage
- Landscape 4: Retention Walls, Dividers & Flatwork
- Landscape Laborer Advanced Course
- Landscape Laborer Introductory Course
- Lead Awareness
- Lead Abatement Initial Class
- Lead Initial
- Lead Abatement Recertification
- Lead Recertification
- Lead Abatement Worker
- Lead Supervisor Initial
- Lead Supervisor Recertification
- Material Handling, Storage, Use and Disposal
- Mechanical Pipe I
- Mechanical Pipe II
- Mine Safety
- Mine Safety
- Mine Safety Recertification
- Mini Excavator
- Mold Remediation Initial
- Mold Remediation Recertification
- OnBoarding for Flaggers OQ
- Oxyfuel Cutting
- Permit Required Confined Space Entry
- Photovoltaics I
- Photovoltaics II
- Photovoltaics Orientation
- Pipe Coating
- Pipe Fusion
- Pipe Fusion OQ
- Pipe Fusion OQ- Polyethylene
- Pipe Laying Techniques
- Placement and Finishing, Panel, Patios, Drives, Decks, Tilt-Up
- Placement, Finishing Tools, Concrete Procedures, Control Joints
- Plaster Tender Fundamentals
- Recognition and Hazard on the Jobsite
- Refinery Safety Orientation
- Respiratory Awareness
- Retention Walls, Dividers & Flatwork
- Rigging and Signaling
- Sandblasting
- Scaffold Builder
- Scaffold User
- Scope of Work, Personal Protective Equipment, Materials and Tools
- Shotcrete Techniques
- Signal Person
- Skid Steer Loader Initial
- Skid Steer Loader Recertification
- Solar
- Squaring Principles, Triangulation
- Steward Training
- Storm Water Management
- Sub-Grade Preparation, Line Setting and Forming Techniques
- Survey, Station, Percentages
- Tilt-Up Construction
• Tools and Equipment: Pick and Pick Mattocks, Shovels, Digging Bars, Jackhammer, Rivet Buster, Chipping Gun and Clay Spades
• Torch Cutting and Burning
• Traffic Control
• Traffic Control and Flagging
• Trench Plates & Shoring
• Tunnel Safety and Preparedness
• Weatherization Technician and Installer
• Welding
• Welding Recert
• Welding Certification – Basic
• Welding Recertification – Basic

BUSINESS SKILLS
• Advanced Time Management
• Conflict Resolution
• Creating Master Plan for Future Improvements
• Creating Project Bids
• Customer Service Skills
• Decision Making Skills
• Filling Out Work Documents and Reports Accurately
• Green Awareness Training and Green Certifications
• Inventory Checklist
• Leadership Skills
• Problem Solving
• Project Management
• Teambuilding Skills

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

Apprentice

Class/Lab Hours
8-210 (Job Numbers 2 & 3)
Trainees may receive any of the following:

COMMERCIAL SKILLS
• Aerial Boom Lift
• Aerial Platform
• Aerial Work Platform Initial
• Aerial Work Platform Recertification
• Air Tools
• Arc Welding
• Area and Volume, Calculating and Estimating
• Asbestos Abatement Worker
• Asbestos Awareness
• Asbestos Contractor/Supervisor Initial
• Asbestos Initial
• Asbestos Removal Initial Class
• Asbestos Recert
• Asbestos Removal Recertification
• Asbestos Contractor/Supervisor Recertification
• Asbestos Paving Techniques
• Asphalt Remove & Replace Builders Level Math
• Basic Computer Skills Orientation
• Basic Construction Math
• Blasting and Coating OQ
• Blueprint Reading – Basic
• Blueprint Reading - Intermediate
• Boom Lift Safety
• Brick Tender Fundamentals
• Brick Tending
• Bulkheads, Batter Boards, Overhead Screed
• Commercial Green Construction Awareness
• Competent Person
• Concrete and Asphalt
• Concrete Coring and Saw Cutting
• Concrete Placement and Finishing, Floors, Drives and Walk Behind Power Trowel
• Concrete Techniques
• Confined Space Awareness
• Confined Space Entry
• Construction Craft Laborer
• Demolition and Destruction Awareness
• Drilling – Horizontal Directional Drilling
• Drilling Air Track Orientation
• Drilling Air Track Advanced
• Drilling Directional
• Environmental Hazards of Highway Work
• Environmental Passport
• Excavation Competent Person
• Fall Protection
• Fire Watch
• First Aid/CPR
• Flagging
• Forklift and Forklift Safety
• Forklift Orientation Initial
• Forklift Orientation Recertification
• Form Setting, Curb and Gutter, Alley Gutter, Pour in Place Walls
• Fractions and Decimals, Inches to Decimals
• Form Setting, Sidewalk, Driveway, Approach, Handicapped Ramp
• Fundamentals of Construction
• Grade Checking
- Hand & Power Tools
- Hazardous Waste Awareness
- Hazardous Waste Initial
- Hazardous Waste Removal Initial
- Hazardous Waste Recert
- Hazardous Waste Removal Recertification
- Hazardous Waste Worker
- Hazworker 40
- Hoisting and Rigging
- Jobsite Erosion Control
- Laborer’s Supervisor
- Landscape 1: Planting & Maintenance
- Landscape 2: Construction Math & Irrigation Systems
- Landscape 3: Erosion Control, Grading & Drainage
- Landscape 4: Retention Walls, Dividers & Flatwork
- Landscape Laborer Advanced Course
- Landscape Laborer Introductory Course
- Lead Abatement
- Lead Awareness
- Lead Abatement Initial Class
- Lead Initial
- Lead Recertification
- Lead Supervisor Initial
- Lead Supervisor Recertification
- Lead Recertification
- Lead Abatement Worker
- Lead Supervisor Initial
- Lead Supervisor Recertification
- Material Handling, Storage, Use and Disposal
- Mechanical Pipe I
- Mechanical Pipe II
- Mine Safety
- Mine Safety
- Mine Safety Recertification
- Mini Excavator
- Mold Remediation Initial
- Mold Remediation Recertification
- Onboarding for Flaggers OQ
- Oxyfuel Cutting
- Permit Required Confined Space Entry
- Photovoltaics Orientation
- Photovoltaics I
- Photovoltaics II
- Pipe Coating
- Pipe Fusion
- Pipe Fusion OQ
• Pipe Fusion OQ- Polyethylene
• Pipe Laying Techniques
• Placement and Finishing, Panel, Patios, Drives, Decks, Tilt-up
• Placement, Finishing Tools, Concrete Procedures, Control Joints
• Plaster Tender Fundamentals
• Recognition and Hazard on the Jobsite
• Refinery Safety Orientation
• Respiratory Awareness
• Rigging and Signaling
• Sandblasing
• Scaffold Builder
• Scaffold User
• Scope of Work, Personal Protective Equipment, Materials and Tools
• Shotcrete Techniques
• Signal Person
• Skid Steer Loader Initial
• Skid Steer Loader Recertification
• Solar
• Squaring Principles, Triangulation
• Steward Training
• Storm Water Management
• Sub-Grade Preparation, Line Setting and Forming Techniques
• Survey, Station, Percentages
• Tilt-Up Construction
• Tools and Equipment: Pick and Pick Mattocks, Shovels, Digging Bars, Jackhammer, Rivet Buster, Chipping Gun and Clay Spades
• Torch Cutting and Burning
• Traffic Control and Flagging
• Trench Plates & Shoring
• Tunnel Safety and Preparedness
• Weatherization Technician and Installer
• Welding
• Welding Certification - Basic
• Welding Recertification - Basic

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

---

**Note:** Reimbursement for retraining is capped at 200 total training hours for Job Number 1 and 210 total training hours for Job Numbers 2 and 3 per-trainee, regardless of method of delivery.
Training Proposal for:

Pipe Trades Joint Apprenticeship and Training Committee of Santa Clara and San Benito Counties

Agreement Number: ET19-0915

Panel Meeting of: July 27, 2018

ETP Regional Office: San Francisco Bay Area      Analyst: C. Hoover

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
<th>Apprenticeship</th>
<th>Veterans</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
<th>Green Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Santa Clara, San Benito</td>
<td>Repeat Contractor:</td>
<td>Yes</td>
<td>No</td>
<td>United Association of Journeymen and Apprentices of the Plumbing and Pipe Fitting Industry of the United States and Canada (UA Local 393)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>≤20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors: (% of total trainees)</td>
<td>N/A</td>
<td></td>
<td></td>
<td></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>$909,600</td>
<td>$63,216</td>
<td>$972,816</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>Retraineep Journeyman Priority Rate</td>
<td>Comm’l. Skills, Computer Skills, OSHA 10/30</td>
<td>75</td>
<td>4-200 0</td>
<td>$1,112</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Apprentice</td>
<td>Comm’l Skills, Computer Skills, OSHA 10/30</td>
<td>178</td>
<td>8-210 0</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Veteran Apprentice</td>
<td>Comm’l Skills, Computer Skills, OSHA 10/30</td>
<td>20</td>
<td>8-210 0</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** SET/Priority Industry: $22.77 per hour  
**Health Benefits:** ☑ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:** ☑ Yes ☐ No ☐ Maybe  
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>Journeyman Plumber, Steamfitter/Pipefitter, Plumbing Service and Repair Mechanic, Refrigeration and Air Conditioning Mechanic</td>
<td>75</td>
<td></td>
</tr>
<tr>
<td>Apprentice Plumber, Steamfitter/Pipefitter, Plumbing Service and Repair Mechanic, Refrigeration and Air Conditioning Mechanic</td>
<td>178</td>
<td></td>
</tr>
<tr>
<td>Veteran Apprentice Plumber, Steamfitter/Pipefitter, Plumbing Service and Repair Mechanic, Refrigeration and Air Conditioning Mechanic</td>
<td>20</td>
<td></td>
</tr>
</tbody>
</table>

### INTRODUCTION

The Pipe Trades Joint Apprenticeship and Training Committee of Santa Clara and San Benito Counties (Pipe Trades JATC) (http://www.pipetradestraining.org/) opened the Lloyd E. Williams Pipe Trades Training Center in 1961 in San Jose. The training center serves 2,200 union
members represented by the Plumbers, United Association Local Union 393. The JATC was created in collective bargaining between Local 393 and management represented by the South Bay Piping Industry and the Santa Clara Valley Contractors Association. This will be Pipe Trades JATC’s fifth ETP Agreement, and the fourth in the last five years.

Pipe Trades JATC provides Apprentice and Journeymen classes to all the pipe trades involved in commercial, industrial, and residential plumbing. Courses are designed to provide Commercial Skills, Computer Skills and OSHA 10/30 training with an emphasis on green technology. The training center is a modern, 100,000 square-foot facility with 48 classrooms and with welding and computer laboratories.

Affiliated with Foothill Community College, this apprentice program is accredited through the Division of Apprenticeship Standards (DAS) to offer apprenticeship opportunities in Residential Plumbing, Commercial Plumbing, Steam Fitting, and Refrigeration/Heating, Ventilation and Air-Conditioning (HVAC). ETP funds will help create a stable, flexible and skilled workforce for the local construction industry to meet continued demand for pipe-trades’ workers generated by new construction projects and backfilling jobs created by retiring Journeymen.

**Employer Demand**

Demand for Apprentices has continued to climb over the past few years with 381 Apprentices currently registered. Pipe Trades JATC graduated 76 Apprentices last year and anticipates 74 graduates this year. Graduates of this program work in construction and repair for industries that include: semiconductor, energy, biopharmaceutical, healthcare, aerospace, education, housing, water treatment, and technology industries. There is currently a high demand for welders in the area. A sample of local construction projects generating demand for Apprentices and Journeymen include:

- Large-scale, corporate headquarters (e.g. - Goggle Campus)
- Ongoing construction projects at Stanford University Campus with completion of New Stanford Hospital and Lucille Packard Children’s Hospital
- Renovation project at the existing Old Stanford Hospital
- Ongoing construction projects at Old Stanford Hospital, El Camino Hospital in Mountain View, Palo Alto VA Hospital, and Santa Clara Valley Medical Center
- California Infrastructures Projects (e.g. – BART)
- Future Apple Campus projects within Santa Clara County
- Continuing work planned at San Jose State University and Santa Clara University
- Large-scale, high-density residential and commercial high-rise and low-rise development projects in Santa Clara, N. San Jose and downtown San Jose
- Continued San Jose Airport Terminal expansion

Participating employers and union representatives have identified the following specific reasons for the need for more training:

- Pipe Trades Training Center HVACR 13 Course Certification
- Energy Management Classification at Local 393
- CAD Detailing at Local 393 created a new skill set
- Green mandates require workers to use new materials and skills
- Non-union and out-of-state bidding requires unionized contractors to show a track record of meeting (not exceeding) labor and materials costs
- Customers have higher quality standards, so workers need wider skill sets and to be able to perform tasks according to new Green requirements.
- Title 24 Verification Courses

Out of the 131 signatory employers, 60% are small. All of Pipe Trades JATC’s training will be delivered to Priority Industry employers. This is the second time Veterans have been introduced as a distinct cohort of Apprentice trainees.

**Veteran Apprentice**

Pipe Trades JATC 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), a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades.

In addition, the Veterans in Piping (VIP) program (http://www.uavip.org/veterans) offered by the United Association (UA) of Journeymen and Apprentices of the Plumbing and Pipe Fitting Industry of the United States and Canada offers high-quality skills training and jobs in the pipe trades to active duty military personnel preparing to leave military service. The VIP program consists of 18 weeks of highly specialized, intensive training in marketable skills such as welding, heating, ventilating, air conditioning and refrigeration (HVACR), and sprinkler fitting. The UA provides Veterans with additional skills’ training opportunities after they complete this program by connecting them to established apprenticeship training programs.

The VIP program has been recognized as one of the leading programs in the country for assisting Veterans. VIP does this at no cost to the military, government, or participants because all costs are paid by the UA and its contractors.

**Apprenticeship Program**

The Panel funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding supplements cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case, the program is 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 from $26 to $21 per hour. The ETP wage for Apprentices is no less than $22.77 per hour. However, the actual wages paid are shown above in the Training Plan Table for the Panel’s information.
PROJECT DETAILS

Journeyman Training

Commercial Skills: Training for all trades will focus on new construction, service, and repair techniques and equipment. Advanced skills training will expand the availability of employer-driven certification classes such as welding, and will also focus on new materials and the modernization of the industry, including the shift to green materials. Because plumbing, pipefitting, and refrigeration work revolves around energy management, many commercial and industrial businesses are seeking LEED certification.

Computer Skills: Training will include scheduling, planning and modeling software. AutoCAD and Job Tracking applications will provide trainees with tools to modify blueprints, look-up project requirements, build budgets and timelines, design virtual buildings, and adjust computerized control systems.

Waiver Request (Journeyman Minimum Hours)

Pipe Trades JATC requests a waiver from the eight-hour minimum training requirement to a four-hour training minimum for 35 Journeyman trainees. Classes for journey-level workers train on a focused scope of work or specialty. Many of these upgrade courses are only four hours. The journey-level workers often do not need to take two 4-hour classes, and the JATC cannot require that the workers come in for additional classes. In the past, the JATC has not been able to include many of its journey-level trainees in ETP-funded training contracts since these trainees attend only one 4-hour class. The journey-level workers need re-certification of NFPA99 2015/ASSE 6000 (National ITC Corporation- NITC Medical Gas System Personnel), which will require a four-hour refresher course- Medical Gas (Installation, System Test, Maintenance, Repair, Standard and Brazing) and need the four-hour minimum waiver.

Apprentice

Commercial Skills: Training will include topics such as trade math, blueprint reading, and all plumbing and mechanical systems in use, in addition to basic skills required across all pipe trades. Training will help apprentices gain the skills needed to work safely and productively across industries. Training will also cover courses in green construction compliance, practices and materials; new equipment, welding and industry certifications; and safety competency and awareness. Because this JATC operates in a highly competitive construction and service market, all training must meet the demands of Silicon Valley’s construction industry.

Computer Skills: Training for apprentices also covers CAD and 3-D software applications.

Certified Safety Training (10%): Journeymen and Apprentice plumbers and related occupations may work under extremely dangerous conditions and on tight timelines. OSHA 10/30 is not included in the 10% limitation on safety training nor in the 50% limitation on CBT.

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.
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.

➢ Training Infrastructure

The Training Director and the JATC’s administrative staff will administer the program. A third-party administrator, Strategy Workplace Communications will assist with the administration. Training will be delivered by in-house experts

Curriculum Development

The curriculum is employer-driven, based on local industry needs. The JATC’s instructors also work with the National Competency Testing Institute to create industry-driven curriculum. In addition, local projects and their hiring demands have resulted in a comprehensive and technically advanced curriculum. It is designed to address employer needs as determined by customers, energy efficiency changes that are quickly becoming standard in the plumbing industry, and local hiring demands and projects. Feedback on all training also comes directly from employer and union representatives, based on workplace performance, requests of customers, needs of the industry and student course evaluations completed at the end of each course.

Impact/Outcome

Certifications earned for the journeymen and apprentice training may include: OSHA 10, OSHA 30, Medical Gas Installer, Medical Gas Brazer, Foreman’s Certification, Industrial Rigging, Signalperson, National Environmental Balancing Bureau Commissioning, Backflow, Blueprints, Star Review and various welding certifications.

Marketing and Support Costs

The JATC is requesting 8% in support costs to fund recruiting and qualify additional participating employers for this program. The JATC Training Coordinator, along with two assistant coordinators and five administrative assistants, will be responsible for marketing, recruiting, and conducting needs assessments. While many participating employers have already been recruited, the JATC still needs to perform additional recruitment and assessment activities with employers to support apprenticeship training. The projected budget costs for personnel alone will exceed the ETP support cost funding.

The JATC will disseminate class information throughout the year to all apprentice and journeyman within the local’s jurisdictions, as well as to the contractors who employ them through direct mailings, personal contacts, telephone calls, public service announcements, emails, and its website. The JATC is also active in the local workforce investment board in northern Santa Clara County (NOVA) where the JATC has a representative that serves as a board member, executive board member, youth subcommittee chairperson, and NOVA Youth Foundation board member. Staff recommends 8% support costs.

RECOMMENDATION

Staff recommends approval of this proposal.
ACTIVE PROJECTS

The following table summarizes performance by Pipe Trades 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>ET17-0917</td>
<td>$538,900</td>
<td>11/7/16 – 11/6/18</td>
<td>260</td>
<td>370</td>
<td>41</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 33,046 reimbursable hours have been tracked for potential earnings of $470,581 (87% of approved amount). The Contractor projects final earnings of 100% based on high employment rates in the local area.

PRIOR PROJECTS

The following table summarizes performance by Pipe Trades JATC 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>ET16-0901</td>
<td>San Jose</td>
<td>8/8/15 – 8/7/17</td>
<td>$642,410</td>
<td>$557,535</td>
<td>(87%)</td>
</tr>
<tr>
<td>ET13-0924</td>
<td>San Jose</td>
<td>4/2/13 – 4/1/15</td>
<td>$502,706</td>
<td>$409,559</td>
<td>(82%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

California Labor Federation in Sacramento and Strategy Workplace Communications in Burlingame 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/E-Learning Hours
4-200 (Job Number 1)

Trainees may receive any of the following:

JOURNEYMAN

COMMERCIAL SKILLS

- Green Compliance
  - Energy Efficiency in Existing Equipment and Materials
  - Design and Installation of New Energy Efficient Equipment and Materials
  - LEED Standards
- BACnet Programming
- Johnson Controls Courses
- Robotic Total Station
- Start Test and Balance
- Solar Installations
- Specialty Seminars for Service Work
- Johnson DX9100 (Brand of Digital Controller)
- Compressor Overhaul
- Direct Digital Controls (Principals of Operation, Calibration, Documentation, Shutdowns)
- Orbital Welding
- Welding
- Brazing
- Safe Working Conditions (All training supplements Cal-OSHA required safety training)
  - Foreman and Worker Responsibility
  - Scaffolding
  - Fall Protection
  - Electrical Safety
  - Falling Objects
  - Working in Confined Spaces
  - Working Around Pipelines
- Certifications
  - Industrial Rigging
  - Signalperson
  - National Environmental Balancing Bureau Commissioning (Certification for Heating & Cooling Systems)
  - NFPA99 2015/ASSE 6000 (National ITC Corporation- NITC Medical Gas System Personnel)
    - Medical Gas - Installation, System Testing, Maintenance, Repair, Standards and Brazing (4.0 hours)
  - Medical Gas -- Installation, System Testing, Maintenance, Repair, Standards and Brazing
  - Foreman
  - Backflow
  - Orbital Welding
  - Star Review
  - Blueprints
- Boilers
**COMPUTER SKILLS**
- Computer-Aided Drafting
  - Bluebeam and PlanGrid Software
- 3-D Drawings Software

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

**Class/Lab/E-Learning Hours**
8 – 210 (Job Numbers 2 & 3)

**APPRENTICE**

**COMMERCIAL SKILLS**
Plumbing and Steamfitters
- 2nd year
  - Code/Water Supply
  - Drawing I
- 3rd year
  - Drawing II
  - Welding
  - Oxygen/Acetylene Training
  - Pipe Fitting
- 4th year
  - Steam Systems
  - Rigging
  - Pipefitting and Service
  - Hydronics/Steam
  - Medical Gas Certification
  - Signal Person Certification
- 5th year
  - Advanced Drawing/Layout
  - Code II
  - Junior Mechanics Review and Exam

Refrigeration
- 2nd year
  - Basic Electricity
  - Advanced Electricity
  - Pneumatic DDC Introduction
- 3rd year
  - Controls I
  - Electro Pneumatics
  - Controls II
Pipe Trades JATC

- Advanced Pneumatics
  - Calibration
  - Hydronics
- 4th year
  - Start, Test and Balance I
  - Start, Test and Balance II
- 5th year
  - Chillers
  - HVAC Star Certificate
  - Special Systems
  - Heating Ventilation Air Conditioning Refrigeration Star Review and Exit Exam

All Trades
- Trade Math
- Industry Math
- Rigging
- Drawing
- Blueprint Reading
- Welding
- Cutting
- Industrial Safety
- Industrial Install
- Medical Gas Install
- Backflow Certification
- Foreman Certification
- Rigging Certification
- Direct Digital Controls
- Compressor Overhaul

**COMPUTER SKILLS**
- Computer-Aided Drafting
  - Bluebeam and PlanGrid Software
- 3-D Drawings Software

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

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

Note: Reimbursement for Job Number 1 (Journeyman) training is capped at 200 total training hours per trainee. Reimbursement for Job Number 2 & 3 (Apprentice) training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA for a total of 210 hours regardless of the method of training delivery.
Training Proposal for:

United Association Local Union 342 Joint Apprenticeship and Training Committee
Agreement Number: ET19-0906

Panel Meeting of: July 27, 2018

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

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Apprenticeships</th>
<th>Priority Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td>Construction</td>
<td>Green Technology</td>
<td></td>
</tr>
<tr>
<td>Priority Industry: Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>County Served:</td>
<td>Alameda, Contra Costa</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repeat Contractor: Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Union: Yes</td>
<td>No United Association of Journeymen and Apprentices of the Plumbing and Pipe Fitting Industry of the United States and Canada (Local 342)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>≤20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors: (% of total trainees) N/A</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>$786,600</td>
<td>$54,450 8%</td>
<td>$841,050</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>Retraine Apprentice</td>
<td>Commercial Skills, OSHA10/30</td>
<td>270</td>
<td>8-210</td>
<td>$2,470</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraine Apprentice</td>
<td>Commercial Skills, OSHA10/30</td>
<td>30</td>
<td>8-210</td>
<td>$2,470</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td>Veteran</td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Journeyman</td>
<td>Commercial Skills, OSHA10/30</td>
<td>150</td>
<td>8-200</td>
<td>$667</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td>Priority Rate</td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

### Minimum Wage by County:
- SET Priority Industry: $22.77 per hour.

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

### Used to meet the Post-Retention Wage?
- ☐ Yes ☒ No ☐ Maybe
  - 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>Apprentice/Veteran Apprentice Plumber, Pipefitter, Steamfitter, Refrigeration Fitter/Air Conditioning Mechanic</td>
<td>300</td>
<td></td>
</tr>
<tr>
<td>Journeyman Plumber, Pipefitter, Steamfitter, Refrigeration Fitter/Air Conditioning Mechanic</td>
<td>150</td>
<td></td>
</tr>
</tbody>
</table>

## INTRODUCTION

The United Association Local Union 342 Joint Apprenticeship and Training Committee (UA Local 342 JATC) (www.ua342.org/training) trains Apprentices and Journeymen for the piping industry in Northern California. The JATC serves 2,000 Journeymen and 520 Apprentices working primarily in Alameda and Contra Costa counties.

Employers are represented by the Industrial Contractors UMIC, Inc., the Northern California Piping Contractors, the Mechanical Contractors Association of Northern California, the Air Conditioning & Refrigeration Contractors Association of Northern California; and the Residential Plumbing and Mechanical Contractors Association of Northern California. Workers to be trained are employed by a variety of firms, including plumbing and mechanical contractors, utility contractors, refineries, building and industrial plant owners, utility and pipeline companies.

The UA Local 342 JATC operates a 45,000 square-foot, fully equipped Training Center located in Concord where all ETP-funded training will occur. The Training Center offers apprentice programs (Plumber, Pipefitter, Steamfitter, Refrigeration Fitter and Air Conditioning Mechanic) registered
through the DAS. Funding for Journeymen training will allow the JATC to offer specialized training leading to certifications that are nationally recognized in the pipe trades industry.

This will be JATC’s fourth ETP Agreement, and the fourth in the last five years. All training has been delivered under the prior Agreement, and there is sustained employer demand for skilled pipe trade workers. ETP funding will help the JATC expand its classes to meet growing employer demand for certified journey level workers, and to train more registered Apprentices. This will be the first time UA Local 342 has a defined cohort of Veteran Apprentices (Job Number 2) to track their long-time commitment to training Veterans.

The JATC provides training for Apprentices and Journeymen in the pipe trades who build and service everything from sanitary plumbing in homes to ultra-pure process piping systems in semiconductor and biotech plants. Examples of work performed include:

- Installation, service, and repair of plumbing and sanitary systems, water and gas piping and fixtures in homes, commercial enterprises and other institutions.
- Construction, service and repair of refrigeration and HVAC systems that maintain the comfort, health, and safety of building occupants or operate in various industrial and commercial applications.
- Design-build, installation and service of high-purity process piping for semiconductor, biotechnology, and pharmaceutical manufacturing.
- Construction, service, and replacement of pipeline systems, including pumps and other installations.
- Installation, service, and repair of piping systems that provide hospital patients with life-giving oxygen and other medical gases.
- Construction, service and repair at oil refineries.

Plumbers create new systems and service, repair, and remodel existing plumbing systems in residential, commercial, and industrial buildings. Refrigeration and air conditioning mechanics install and retrofit all types of refrigeration equipment, from small air conditioning systems to HVAC units used in hospitals, schools, and other complex installations. Steamfitters/pipefitters are responsible for designing and installing complex heating systems, and special piping for acid, gas, oil, air, oxygen, nitrogen, and ultra-high-purity water and gas systems.

**PROJECT DETAILS**

**Employer Demand for Training**

Employers need training to acquire an adequate number of skilled craftsmen to work in specialized jobs and to replace retiring baby boomers. There is a national shortage in the pipe trades industry, especially for welders. There is also a shortage of workers trained in energy efficient “green” building technologies and procedures.

Because of employer demand and new green energy technologies and requirements, many construction contractors are requiring multiple certifications for both Apprentices and Journeymen. For example, HVAC workers performing Title 24 testing must be certified through approved training programs including courses included in this proposal such as Energy Audits, HVAC Star Mastery, and Start, Test, and Balance. The JATC 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 and laboratory training equipment.
Demand for trained workers in oil refineries has increased as a result of SB 54, which requires that an increasing percentage of refinery workers be registered Apprentices or graduates of apprenticeship programs. PG&E continues its program of replacing gas pipelines throughout Northern California which generates demand for skilled pipe trades workers.

In addition, the trade itself is changing. Work is becoming more complex and workers are expected to be more productive. New systems require fewer people to complete a job, but each person must be better trained. For example, many jobs are now laid out using hand-held computers with GPS systems. Workers use computer systems linked directly to satellites and advanced computer-aided design and building information modeling systems. There also is an increased demand for workers skilled in AutoCAD who can produce detailed construction plans.

Major construction projects continue to require more trained pipe trades workers. For example, workers are needed for projects in Oakland, including the Uber building; the Workday Office Buildings, a 30-story residential high-rise at 1640 Broadway; and Oakland Children’s Hospital.

Apprenticeship Program

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 proposal, the programs are five years.

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

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5, reducing the priority industry rate from $26 to $21 per hour. Journeymen training is reimbursed at the priority industry retraining rate of $26 per hour. The ETP wage for all trainees is no less than $22.77 per hour, tracking the statewide Special Employment Training wage as modified for priority industries. The actual wages paid are shown in the Training Plan Table for the Panel’s information.

Veteran Apprentice

The JATC 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), a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades.

In addition, the Veterans in Piping (VIP) program (http://www.uavip.org/veterans) offered by the United Association (UA) of Journeymen and Apprentices of the Plumbing and Pipe Fitting Industry of the United States and Canada, offers high-quality skills training and jobs in the pipe trades to active duty military personnel preparing to leave military service. The VIP program consists of 18 weeks of highly specialized, intensive training in marketable skills such as welding; heating, ventilating, air conditioning and refrigeration; and sprinkler fitting. The UA provides Veterans with additional skills training opportunities after they complete this program by connecting them to established apprenticeship training programs such as the UA Local 342 JATC. This program is a major factor in the JATC’s recruitment of Veterans.
Training Plan

All class/lab training is center-based and delivered at the JATC’s training center in Concord.

**Apprenticeship Training**

**Commercial Skills**: Training will include topics such as trade math, blueprint reading, and all plumbing and mechanical systems in use, in addition to basic skills required across all pipe trades. Training will help apprentices gain the skills needed to work safely and productively across industries. Training will also cover courses in green construction compliance, practices and materials; new equipment, welding and industry certifications; and more safety competency, as opposed to just safety awareness.

**Journeyman Training**

**Commercial Skills**: Training proposed in this application will give journeymen skills in valve repair, medical gas installation, welding, refrigerant handling, industrial rigging, foreman skills, geothermal systems, green awareness, instrumentation, and field computer systems. This specialized training leads to certifications that are recognized nationally in the pipe trades industry.

**Certified Safety Training**

**OSHA 10/30**: Journeymen and apprentices may receive OSHA 10/30. The coursework must be approved by, and the instructors must be certified by Cal-OSHA. OSHA 10/30 is not included in the 10% limitation on safety training. Training will help ensure safe working conditions and fulfill current mandates requiring a percentage of an employer’s on-site workforce be OSHA certified.

**Electronic Recordkeeping**

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

**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 provided by participating employers in accordance with all pertinent requirements under state and federal law.

- **Training Infrastructure**

Four staff work part time for the JATC and assist in ETP administration. The JATC staff will coordinate training scheduling. Training attendance will be kept by each instructor and passed to the administrative staff of the JATC, which maintains the data in the LMS. Training, demographic, and work hour data will be forwarded to Steve Duscha who uploads the data to ETP web sites. All training will be provided by in-house experts.

**Marketing and Support Costs**

UA Local 342 JATC requests, and staff recommends, 8% support costs to assist in trainee recruitment, employer outreach and assessment of employer-specific job requirements. All training is marketed through the various participating employer associations and through the JATC’s newsletters, public service announcements, personal contacts, telephone calls, the
Internet, emails, and the JATC’s website. While many participating employers have already been recruited, additional recruitment and assessment activities with employers must occur.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**CURRENT CONTRACT PERFORMANCE**

The following table summarizes performance by UA Local 342 JATC under its current 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>ET17-0931</td>
<td>$533,399</td>
<td>04/03/17 – 04/02/19</td>
<td>449</td>
<td>276</td>
<td>0</td>
</tr>
</tbody>
</table>

Based on the ETP tracking system, 37,832 reimbursable hours have been tracked (over 93% of the Agreement amount) as of May 30, 2018. All training has now ended under this Agreement. The Contractor projects final earnings of 100% based on employment retention.

**PRIOR PROJECTS**

The following table summarizes performance by the UA Local 342 JATC 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>ET16-0914</td>
<td>Concord</td>
<td>10/05/15 - 10/04/17</td>
<td>$534,555</td>
<td>$482,897</td>
<td>(90%)*</td>
</tr>
<tr>
<td>ET14-0916</td>
<td>Concord</td>
<td>05/5/14 - 05/4/16</td>
<td>$533,399</td>
<td>$524,591</td>
<td>(98%)</td>
</tr>
</tbody>
</table>

*An additional Final Payment Invoice for $37,701 is still being processed by ETP as of June 20, 2018. If the $37,701 is added to the $482,897, final earnings may be at $520,598 or 97% Payment Earned.

**DEVELOPMENT SERVICES**

Steve Duscha Advisories in Sacramento assisted with proposal development 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 Training

Class/Lab Hours
8 - 210

Trainees may receive any of the following:

COMMERCIAL SKILLS
Refrigeration Fitter/Air Conditioning Mechanic:
- Beginning Electrical Theory
- Mechanical Refrigeration Theory
- Electrical Theory/Beginning Schematics
- The Refrigeration Cycle
- Intermediate Electrics I
- Intermediate Mechanical Refrigeration I
- Intermediate Electrical II
- Intermediate Mechanical Refrigeration II
- Electrical Troubleshooting I
- Electrical Troubleshooting II
- Introduction to Direct Digital Controls
- Introduction to Variable Frequency Drivers
- Introduction to Market Refrigeration Systems
- Introduction to Pneumatic Controls
- Introduction to Boilers
- Advanced Compressor and Motor Theory
- Start Test Balance: Water Side I
- Start Test Balance: Air side I
- Start Test Balance: Water Side II
- Start Test Balance: Air Side II

Plumber/Pipefitter:
- CPR
- Trade Mathematics
- Computers in the Field
- Water Supply Systems
- Sewage Disposal
- Plumbing System Service and Repair
- Construction Management in Plumbing
- Medical Gas Systems
- Related Science in the Piping Trades
- Beginning Drawing & Plan Reading for the Piping Trades
- Advanced Drawing in the Piping Trades
- Plumbing Tool Workshop I
- Plumbing Tool Workshop II
- Plumbing Code I
- Plumbing Code II
- Welding for Plumbers
- Electricity for Plumbers
- Gas Installation in Plumbing
- Backflow Prevention
- Plumbing Fixtures
- Certification Preparation
Steamfitter:
- CPR
- Trade Mathematics
- Computers in the Field
- Use and Care of Tools
- Welding Safety/Plate Welding
- Oxygen/Acetylene Cutting
- Pipe Shop I
- Pipe Shop II
- Related Science in the Piping Trades
- Beginning Drawing and Plan Reading for the Piping Trades
- Advanced Drawing in the Piping Industry
- Instrumentation 1
- Instrumentation 2
- Steam Systems
- Electricity for Steamfitting
- Industrial Rigging
- Beginning AutoCAD
- Advanced AutoCAD
- Pumps
- Tube Bending
- Pipe Welding 1
- Welding 5
- Welding 6
- Welding 7
- Welding 8
- Welding 9
- Welding 10
- Orbital Welding
- Construction Management in Steamfitting

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

Class/Lab Hours
- 8-200

Journeymen Training

Trainees may receive any of the following:

COMMERCIAL SKILLS
- Auto CAD
- Advanced Drawing (Pipe Drafting)
- Advanced Plan Reading
- Basic Electricity
- Beginning Instrumentation
- Blueprint Reading
- Boiler
- Brazing
- Crane Operations
- Handling Refrigerants
- Construction Management
Detailing
Diametrics
Downhill Welding
Drawing
Foreman Training
Gas
Gas Installations (Plumbing)
Hand Fusion
HVAC Theory
Industrial Instrumentation (Tube Bending)
Instrumentation
Med Gas
Med-Gas Installer/Brazer (For UA Certification)
MIG
Orbital Welding
Plumbing Code
Plumbing Fixtures & Appliances (Plumbing)
Polyvinylidene Fluoride Products
Rigging
Signal Person
Tig & Fusion Welding
Trimble
Tube Bending
Variable Speed
Water Supply

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

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

Note: Reimbursement is capped at 210 total training hours per Apprentice trainee and 200 total hours for Journeymen regardless of the method of delivery.
Training Proposal for:

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

Agreement Number: ET19-0908

Panel Meeting of: July 27, 2018

ETP Regional Office: Sacramento Analyst: K. Jones

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
<th>Apprenticeship</th>
<th>Veterans</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>
</tbody>
</table>

| Counties Served:     | Stanislaus, San Joaquin |
| Repeat Contractor:   | ☒ Yes ☐ No |

| Union(s):            | ☒ Yes ☐ No Central Valley - Mother Lode Plumbers, Pipe and Refrigeration Fitters JATC Local Union 442 |

Turnover Rate: ≤20%
Managers/Supervisors: (% of total trainees) NA

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>$213,000</td>
<td></td>
<td>$14,799 8%</td>
<td></td>
<td>$227,799</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 Journeyman Priority Rate</td>
<td>Business Skills, Commercial Skills, OSHA 10/30</td>
<td>25</td>
<td>4-200 0</td>
<td>$667</td>
<td>$22.77</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>Retrainee Apprentice Priority Rate</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>43</td>
<td>8-210 0</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Retraine Apprentice Veterans Priority Rate</td>
<td>Commercial Skills, OSHA 10/30</td>
<td>4</td>
<td>8-210 0</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Minimum Wage by County:
Statewide Priority Industry Wage of $22.77

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

### Used to meet the Post-Retention Wage?
- Yes
- No
- Maybe
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>Job Number 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Journeymen Plumber, Pipefitter, Refrigeration Fitter</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Job Number 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apprentice Plumber, Pipefitter, Refrigeration Fitter</td>
<td>43</td>
<td></td>
</tr>
<tr>
<td>Job Number 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Veteran Apprentice Plumber, Pipefitter, Refrigeration Fitter</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

## INTRODUCTION

Central Valley Mother Lode Plumbers, Pipe and Refrigeration Fitters Joint Apprenticeship Training Committee (Central Valley) 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. Central Valley is funded by signatory employers pursuant to collective bargaining. Central Valley consists of equal representatives from labor and employers.
Central Valley is responsible for training over 460 journeymen and 80 apprentice workers to ensure that union plumbers, pipefitters and refrigeration fitters have the skills, knowledge and experience necessary to build and service commercial and residential buildings.

This is the fifth ETP Agreement with Central Valley, the fourth in the last five years. This is the second project including a veterans component.

**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 DAS. ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case, the programs are 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 standard and modified retention will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5, reducing the priority industry rate from $26 to $21 per class/lab hour. The ETP wage for Apprentices and Journeymen is no less than $22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel’s information.

**PROJECT DETAILS**

Training will expand trainees’ skills in preparation for projects in the Madera, Fresno and the Clovis area. Their new projects will include the Clovis Hospital expansion and new prison construction in Fresno and Madera counties.

There is an increasing need for skilled, experienced, and credentialed plumbers, pipefitters and refrigeration fitters at all levels. Well-trained employees are key to structural integrity and safety of construction projects. To win contracts and maintain employment levels, employers must have highly skilled and certificated workers.

In an effort to meet water and energy efficiency goals, Central Valley has included water efficiency training to its curriculum. The Green Mandate now requires workers to use new materials and skills to build and maintain water efficient buildings. In addition, clients have higher quality standards while requiring projects to stay on budget and on time. Training is needed for trainees to become proficient in the use of new materials and to reduce waste.

Plumbers will receive training in servicing, repairing, and remodeling existing plumbing systems in residential, commercial, and industrial buildings. Refrigeration Fitters will require training in installing and retrofitting all types of refrigeration equipment and refrigeration units used in hospitals, schools, and other complex installations. Pipefitters will learn to design and install complex heating systems, special piping for acid, gas, oil, air, oxygen, nitrogen, and ultra-high-purity water and gas systems.
Central Valley Mother Lode, Plumbing, Pipe and Refrigeration Fitters JATC
July 27, 2018

Training Plan

All class/lab training will be delivered at Central Valley’s headquarters in Modesto. Trainers are qualified Journeymen with extensive technical expertise and training experience, employed by Central Valley. All instructors meet standards set by the LEA.

Business Skills: Training will be delivered to Journeymen in topics such as Customer Service, Problem Solving, Inventory Checklist, Advanced Time Management, and Creating Project Bids. Training will give workers the skills needed to complete jobs quickly and with the highest quality workmanship.

Commercial Skills: Training will be offered to all occupations to develop high skills levels needed in the plumbing industry. Courses will include topics such as Medical Gas/Foreman’s Class, AC & Refrigerants, Valve Repair & Foreman’s Class, Plumbing Code Application & Drainage, and Water Supply, Backflow Prevention & Pumps.

Certified Safety Training

OSHA 10/30: Journeymen and Apprentices may receive OSHA 10/30. 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, OSHA training is delivered to workers in the building trades. This training is not required as a condition of doing business in California. Note: To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full course. OSHA 10/30 is not included in the 10% limitation on safety training. The trainer-to-trainee ratio is 1:40 for OSHA 10/30.

Veterans Program

Central Valley recruits Veterans in cooperation with Helmets to Hardhats, a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades.

Also, the Veterans in Piping (VIP) program offered by the National UA, offers high-quality skills training and jobs in the pipe trades to active-duty military personnel preparing to leave the service. Since 2008, the UA has trained over 1,000 Veterans. The VIP program consists of 18 weeks of highly specialized, intensive training in marketable skills such as welding, heating, ventilating, air conditioning and refrigeration and sprinkler-fitting. The UA provides participants with additional skills training opportunities after the Veterans complete this program by connecting them to established apprenticeship training programs. When they enter a local UA, the Veterans are given credit for the classes they have already taken.

The UA VIP Program is recognized as one of the leading programs in the country for serving veterans at no cost to the military.

Minimum Number of Training Hours Waiver

The minimum number of training hours during the contract term is 8. However, Central Valley is requesting a minimum of 4 training hours for Journeymen.

Journeymen are required to take a 4-hour Med Gas Refresher course in order to keep their certification through the National Inspection Testing and Certification Corporation. Many of Central Valley’s Journeymen need only this 4-hour course.
Commitment to Training

ETP funding will not displace Central Valley’s financial 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 provided by participating employers in accordance with all pertinent requirements under state and federal law.

➢ Training Infrastructure

The Training Coordinator and an Administrative Assistant, who were involved in previous ETP training Agreements, will assist with administration of this project. The staff will coordinate training and review attendance rosters for ETP compliance. Central Valley employs 12 part-time trainers who will deliver all training and document the training in accordance with ETP regulations. Central Valley has contracted with Strategy Workplace Communications to provide administrative services for the ETP Agreement.

Curriculum Development

Central Valley’s director along with the labor and management representatives have developed and customized a curriculum to address the local needs of its members, participating employers and the industry. Industry needs are determined by Central Valley, union representatives, and the United Association (UA) Instructor Training Program, which provides feedback on industry trends and new and evolving certification requirements. Central Valley also works with employers to perform assessments of employer-specific job requirements and collect feedback on workplace performance, requests of customers, and student course evaluations.

Marketing and Support Costs

Marketing is done through the Central Valley’s website, direct mailings, brochures/flyers, personal contacts, telephone calls, public service announcements and e-mail announcements. Central Valley also promotes this training program at labor-management meetings and industry assemblies.

Central Valley requests 8% support costs to fund its staff in recruiting and qualifying additional participating employers for this program. While many participating employers have already been recruited, additional recruitment and assessment activities with employers and Central Valley must occur to support apprenticeship training. Staff recommends 8% support costs.

Tuition Reimbursement

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by Central Valley under an active ETP Agreement:
Based on ETP Systems, 14,225 reimbursable hours have been tracked for potential earnings of $197,237 (94% of approved amount). The Contractor projects final earnings of 96% based on training currently committed to by employers and in progress through August 2018.

PRIOR PROJECTS

The following table summarizes performance by Central 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>ET15-0913*</td>
<td>Modesto, Stockton</td>
<td>09/01/14-08/30/16</td>
<td>$231,140</td>
<td>$144,455 (62%)</td>
</tr>
<tr>
<td>ET13-0910**</td>
<td>Modesto, Stockton</td>
<td>10/08/12-10/07/14</td>
<td>$236,927</td>
<td>$160,547 (68%)</td>
</tr>
</tbody>
</table>

*ET15-0913: Several planned projects were delayed during the term of this contract, resulting in apprentices not being able to meet the retention requirement. The subsequent Agreement (ET17-0919) was right sized to reflect earnings awarded under the ET15-0913 Agreement.

**ET13-0910: Performance was lower than anticipated because the local industry was still recovering from the recession. Trainees were not able to complete retention.

DEVELOPMENT SERVICES

California Labor Federation of Sacramento assisted with development of this proposal at no cost.

ADMINISTRATIVE SERVICES

Strategy Workplace Solutions of Oakland will perform administrative services for a fee not to exceed 13% payment earned.

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
4-200 Job Number 1

Journeyman

Trainees may receive any of the following:

COMMERCIAL SKILLS
- 1st period Class; Soldering, Tools & Materials
- 2nd Period Class; Math & Beginning Rigging
- 3rd Period Class; Drawing Interp. Science, Basic Electricity
- 4th Period Class; Shielded Metal Arc Welding
- 5th Period Class; Pipe Fitting & the Calculator, G-PRO Cert
- HVAC 3rd Refrigeration (Volume I & II), Customer Service
- HVAC 4th AC & Refrigerants
- HVAC 5th Electronics for MES
- HVAC 6th DC Electronics
- HVAC 7th Refer II & Pneumatics
- HVAC 8th Motor Alignment & AC
- HVAC 9th Air & Water Balance
- Pipefitter 6th Patterns, Pumps, Hydronic, & Steam Systems
- Pipefitter 7th Fitter Advanced Plan Reading, CAD & Math Chpt 6
- Pipefitter 8th Instrumentation, Tube Bending & Rigging Cert
- Pipefitter 9th Detail & Layout of Piping/Advanced Welding
- Pipefitter 10th Valve Repair & Foreman’s Class
- Plumber 6th Plumbing Code Application & Drainage
- Plumber 7th Plumbing Service & Gas Installations
- Plumber 8th Advanced Plan Reading, CAD & Math Chpt. 6
- Plumber 9th Water Supply, Backflow Prevention & Pumps
- Plumber 10th Medical Gas/Foreman’s Class

BUSINESS SKILLS
- Advanced Time Management
- Conflict Resolution
- Creating Master Plan for Future Improvements
- Creating Project Bids
- Customer Service
- Decision Making
- Filling Out Work Documents and Reports Accurately
- Green Awareness Training and Green Certifications
- Inventory Checklist
- Leadership
- Problem Solving
- Project Management
- Teambuilding

OSHA 10/30 (OSHA Certified Instructor)
- OSHA 10
- OSHA 30
Class/Lab Hours
8-210 Job Numbers 2 & 3

Apprentice

Trainees may receive any of the following:

COMMERCIAL SKILLS

Plumbing, Pipe Fitters and Refrigeration Fitters
- 1st period Class; OSHA 30, Soldering, Tools & Materials
- 2nd Period Class; Math & Beginning Rigging
- 3rd Period Class; Drawing Interp. Science, Basic Electricity
- 4th Period Class; Shielded Metal Arc Welding
- 5th Period Class; Pipe Fitting & the Calculator, G-PRO Cert
- HVAC 3rd Refrigeration (Volume I & II), Customer Service
- HVAC 4th AC & Refrigerants
- HVAC 5th Electronics for MES
- HVAC 6th DC Electronics
- HVAC 7th Refer II & Pneumatics
- HVAC 8th Motor Alignment & AC
- HVAC 9th Air & Water Balance
- Pipefitter 6th Patterns, Pumps, Hydronic, & Steam Systems
- Pipefitter 7th Fitter Advanced Plan Reading, CAD & Math Chpt 6
- Pipefitter 8th Instrumentation, Tube Bending & Rigging Cert
- Pipefitter 9th Detail & Layout of Piping/Advanced Welding
- Pipefitter 10th Valve Repair & Foreman’s Class
- Plumber 6th Plumbing Code Application & Drainage
- Plumber 7th Plumbing Service & Gas Installations
- Plumber 8th Advanced Plan Reading, CAD & Math Chpt. 6
- Plumber 9th Water Supply, Backflow Prevention & Pumps
- Plumber 10th Medical Gas/Foreman’s Class

OSHA 10/30 Certified OSHA Instructor
- OSHA 10
- OSHA 30

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee in Job Number 1 and capped at 210 total training hours per trainee for Job Numbers 2 & 3, regardless of the method of delivery.
Training Proposal for:
Central Valley Roofers, Waterproofers & Allied Workers Joint Apprenticeship and Training Committee
Agreement Number: ET19-0911

Panel Meeting of: July 27, 2018
ETP Regional Office: Sacramento  Analyst: K. Jones

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Apprenticeship</th>
<th>Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Priority Industry:</td>
<td>Yes</td>
<td>No</td>
<td>Priority Industry:</td>
<td>Yes</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Fresno, Madera, Kings, Tulare, Kern, Mono, Inyo</td>
<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>Roofers and Waterproofers Local 27</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>≤20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors: (% of total trainees)</td>
<td>N/A</td>
<td></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>$163,640</td>
<td>+</td>
<td>$11,340 8%</td>
<td>=</td>
<td>$174,980</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>Retrainees</td>
<td>Comm'l. Skills, Computer Skills, OSHA 10/30</td>
<td>40</td>
<td>8-200</td>
<td>0</td>
<td>$444</td>
</tr>
<tr>
<td></td>
<td>Journeyman Priority Rate</td>
<td>Weighted Avg: 16</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainees</td>
<td>Comm'l. Skills, Computer Skills, OSHA 10/30</td>
<td>70</td>
<td>8-210</td>
<td>0</td>
<td>$2,246</td>
</tr>
<tr>
<td></td>
<td>Apprentice Priority Rate</td>
<td>Weighted Avg: 100</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** Job Number 1 (SET/Priority Industry): $22.77 per hour  
Job Number 2 (Collective Bargaining Agreement): $20.85 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 $6.48 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>Journeyman Roofer, Waterproofer</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apprentice Roofer, Waterproofer</td>
<td>70</td>
<td></td>
</tr>
</tbody>
</table>

### INTRODUCTION

Founded in 1919 and located in Fresno, Central Valley Roofers and Waterproofers Joint Apprenticeship and Training Committee (Central Valley Roofers) is jointly sponsored by Roofers and Waterproofers Local 27. Central Valley Roofers trains Apprentices and Journeymen for the roofing and waterproofing industry. Central Valley Roofers serve 300 union members across seven counties (Fresno, Madera, Kings, Tulare, Kern, Mono, Inyo). There are five signatory employers, 40% of which are small businesses.

The Training Center is located in Fresno County and offers apprentice programs (Roofer and Waterproofer) accredited through the Division of Apprenticeship Standards. This is Central Valley Roofers’ first ETP Agreement.
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 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 42 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 $26 to $21 per hour. The ETP wage for Apprentices is no less than $22.77 per hour. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $22.77, for both Apprentices and Journeymen.

PROJECT DETAILS

The roofing and waterproofing industry is changing from the traditional Hot Tar systems to Single-Ply and other modified roofing systems. According to Central Valley Roofers, Single-Ply is cost effective, energy-efficient and in high demand from commercial and residential clients. However, these roofing systems are more complex and workers require training to be efficient and knowledgeable in these new techniques.

Central Valley Roofers has also seen an increased demand for advanced roofing systems such as photovoltaic, vegetative and rainwater harvesting. Employers have requested that workers receive training on these types of roofing systems to ensure trainees have the flexibility and skills to work with a variety of roofing materials.

Employers must acquire an adequate number of skilled craftsmen to work in specialized jobs and to replace retiring Journeymen. There is a regional shortage of Roofers and Waterproofers in the industry, especially at the journey level. For Central Valley Roofers to meet employer demand, Journeymen and Apprentice trainees require training to attain the skills and experience necessary to reach the journey level.

Training Plan

All Class/Lab training is center-based and delivered at the Central Valley Roofers training center in Fresno.

Commercial Skills: Training will be provided to Apprentices and Journeyman based on skill level and time-in. Topics include Rigging and Hoisting, Metal Roofing, Asphalt and Wood Shingles, Following Project Plans, Green Roofs, Rainwater Harvesting Systems, Roof Pumps and Tankers, and Air Barriers for Ventilation and Heat Escape. Training will help Apprentices and Journeymen gain the skills needed to work safely and productively in the roofing industry.

Computer Skills: Training will be offered to all occupations in computer software programs available while on the job. Topics include Computer Operations for Construction and Construction Modeling.
Certified Safety Training

OSHA 10/30: Journeymen and Apprentices may receive OSHA 10/30. 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, OSHA training is delivered to workers in the building trades. This training is not required as a condition of doing business in California. Note: To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full course. OSHA 10/30 is not included in the 10% limitation on safety training. The trainer-to-trainee ratio is 1:40 for OSHA 10/30.

DAS Completion Rates

The average completion rate for Apprentices in the Roofing and Waterproofing industry is 24% as measured by DAS over the most recent five-year reporting period: CY2012 through CY2016. When the average completion rate for an apprenticeship program is less than half the industry average (benchmark), the Panel requires a justification for funding.

In this proposal, the DAS completion rate for Central Valley Roofers is 7%, which is below the benchmark. Due to discrepancies in management, documentation and record retention, the completion rate for apprentices suffered. However, Central Valley Roofers have taken steps to increase their completion rate. These steps include recruiting a new Training Coordinator from a JATC that has a successful completion rate, and a new Director of Training. The Director of Training has implemented a new record retention process that will keep the Central Valley Roofers organized and increase the DAS completion rate.

Commitment to Training

ETP funding will not displace the Central Valley Roofers financial 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 provided by participating employers in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

The Training Coordinator and Training Director will coordinate training. Central Valley Roofers employs part-time trainers who will deliver all training. Central Valley Roofers has retained Steve Duscha Advisories to provide administrative services. Training will be delivered by in-house experts.

Impact/Outcome

Certifications for Journeymen and Apprentice training include OSHA 10/30, fall prevention, scaffold safety and torch application.

Curriculum Development

The Central Valley Roofers’ Training Director along with the labor and management representatives have developed a customized curriculum to address the local needs of its members and participating employers. Industry needs are determined by Central Valley Roofers, union representatives, and the United Association Instructor Training Program, which provides feedback on industry trends and new and evolving certification requirements. Central Valley Roofers also works with employers to perform assessments of employer-specific job requirements.
and collect feedback on workplace performance, requests of customers, and student course evaluations.

**Marketing and Support Costs**

Marketing is done through the Central Valley Roofers website, direct mailings, brochures/flyers, personal contacts, telephone calls, public service announcements and e-mail announcements. Central Valley Roofers also promotes this training program at labor-management meetings and industry assemblies.

Central Valley Roofers requests 8% support costs to fund its staff in recruiting and qualifying additional participating employers for this program. While many participating employers have already been recruited, additional recruitment and assessment activities with employers and Central Valley Roofers must occur to support apprenticeship training. Staff recommends 8% support costs.

**Tuition Reimbursement**

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

Steve Duscha Advisories in Sacramento assisted with development for a flat fee $5,000.

**ADMINISTRATIVE SERVICES**

Steve Duscha Advisories will also perform administrative services for a fee not to exceed 12.2% of payment earned.

**TRAINING VENDORS**

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200 Job Number 1

Journeymen

Trainees may receive any of the following:

COMMERCIAL SKILLS
- Advanced Concepts in Waterproofing and Dampproofing
- 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
- Creating and Implementing Project Plans
- Green Roof Specific Safety Issues
- Handling Pressurized Equipment
- Infection Control in Healthcare Facilities
- Project Management Systems
- Rainwater Harvesting Systems
- Rigid Roofing
- Roofing Materials
- Single-Ply Products and Uses
- Title 24 Energy Standards for Roofing
- Torch-On Product
- Vegetative Roofs
- Waterproofing on Vertical Surfaces
- Wind Uplift and Load Issues Related To Rreen 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 & Testing
- Estimating Systems
- Project Management Software

OSHA 10/30 (OSHA Certified Instructor)
- OSHA 10
- OSHA 30
Class/Lab Hours
8-210 Job Number 2

Apprentice

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
- Infection Control in Healthcare Facilities
- Insulation Materials
- Low Slope Roofing
- Maintenance and Repair
- Measurement and Calculation Problems in Roofing
- Metal Roofing
- Mopping Operations
- Rainwater Harvesting Systems
- 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 and Systems
- Single-Ply Roofing 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
- OSHA 30

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee in Job Number 1. Reimbursement for retraining is capped at 210 total training hours per trainee in Job Number 2, regardless of the method of delivery.
Training Proposal for:

Fresno Area Plumbers, Pipe and Refrigeration Fitters Joint Apprenticeship Training Committee

Agreement Number: ET19-0909

Panel Meeting of: July 27, 2018

ETP Regional Office: Sacramento

Analyst: K. Jones

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Apprenticeship Veterans</th>
<th>Priority Rate</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 ☐ No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Fresno, Madera, Tulare, Kings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat Contractor:</td>
<td>☑ Yes ☐ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>☑ Yes ☐ No UA Local 246</th>
</tr>
</thead>
<tbody>
<tr>
<td>Turnover Rate:</td>
<td>≤20%</td>
</tr>
</tbody>
</table>

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

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>$313,800</td>
<td></td>
<td>$21,812</td>
<td></td>
<td>$335,612</td>
</tr>
</tbody>
</table>

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

ETP 130 - MEC (06/05/09) Exhibit B
## 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 Journeyman Priority Rate</td>
<td>Commercial Skills, Computer Skills, OSHA 10/30</td>
<td>15</td>
<td>4-200</td>
<td>0</td>
<td>$1,112 $22.77</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>Retrainee Apprentice Priority Rate</td>
<td>Commercial Skills, Computer Skills, OSHA 10/30</td>
<td>65</td>
<td>8-210</td>
<td>0</td>
<td>$4,492 $22.77</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>3</td>
<td>Retrainee Apprentice Veteran Priority Rate</td>
<td>Commercial Skills, Computer Skills, OSHA 10/30</td>
<td>6</td>
<td>8-210</td>
<td>0</td>
<td>$4,492 $22.77</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>
</tbody>
</table>

### Minimum Wage by County:
Statewide Priority Industry Wage of $22.77

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

### Used to meet the Post-Retention Wage?:
- Yes □ No □ Maybe

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>Job Number 1 (Journeymen)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plumber and Pipefitter</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Refrigeration and Air Conditioning Mechanic</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Job Number 2 (Apprentice)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plumber and Pipefitter</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>Refrigeration and Air Conditioning Mechanic</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Job Number 3 (Veteran Apprentice)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plumber and Pipefitter</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Refrigeration and Air Conditioning Mechanic</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

## INTRODUCTION

Founded in 1942, Fresno Area Plumbers, Pipe and Refrigeration Fitters Joint Apprenticeship Training Committee (Fresno Area Plumbers) trains Apprentices and Journeymen for the piping industry. Fresno Area Plumbers serves 600 union members across 4 counties (Fresno, Madera, Kings and Tulare), and consists of three management representatives from the Mechanical Contractors Association and three members from UA Local 246 representing labor. There are 18 signatory employers, 90% of which are small business.
The UA Local 246 maintains an 18,000-square-foot building containing the Union Offices, Meeting Hall, and Training Center. Affiliated with Fresno County Office of Education/Regional Occupation Program, the Training Center offers apprentice programs (Plumber, Pipe and Refrigeration Fitter) accredited through the DAS.

This is Fresno Area Plumbers’ third ETP Agreement and third in the last five years. This is the second time Veterans have been introduced as a distinct population 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 five years.

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

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5, reducing the priority industry rate from $26 to $21 per class/lab hour. The ETP wage for Apprentices is no less than $22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel’s information.

**PROJECT DETAILS**

Training will expand trainees’ skills in preparation for projects in the Fresno area. New projects include a high speed rail station in Fresno County, a new pipeline in Fresno Country, and construction on the Fresno Jail.

Plumbers will receive training in servicing, repairing, and remodeling existing plumbing systems in residential, commercial, and industrial buildings. Fresno Area Plumbers will also receive Water Supply training to meet clients’ water and energy efficiency goals.

Refrigeration and Air Conditioning Mechanics will receive training in installing and retrofitting all types of refrigeration equipment, from small air conditioning systems to the air conditioning and refrigeration units used in hospitals, jails, schools, and other complex installations. Pipefitters will also learn to design and install complex heating systems and special piping for acid, gas, oil, air, oxygen, nitrogen, and ultra-high-purity water and gas systems.

**Training Plan**

Training will cover plumbing and piping equipment, updated building standards and green business practices. Training will be delivered at Fresno Area Plumbers headquarters in Fresno. Trainers are qualified Journeymen with extensive technical expertise and training experience, employed by the JATC. All instructors meet standards set by the LEA.
**Commercial Skills:** Training will be offered to all occupations to develop high skill levels needed in the plumbing industry. Courses provided include Orbital Welding, Brazing, Pipefitting, Rigging, Plumbing Code, and Tube Bending.

**Computer Skills:** Training will be offered to all occupations. Topics include Computer-Aided Drafting, and 3-D Drawings Software.

**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 training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and instructors must be certified by Cal-OSHA.

**Veterans Program**

Fresno Area Plumbers recruits Veterans in cooperation with Helmets to Hardhats, a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades.

Also, the Veterans in Piping (VIP) program offered by the National United Association (UA), offers high-quality skills training and jobs in the pipe trades to active duty military personnel preparing to leave the service. Since 2008, the UA has trained over 1,000 Veteran. The VIP program consists of 18 weeks of highly specialized, intensive training in highly marketable skills such as welding, heating, ventilating, air conditioning and refrigeration and sprinkler-fitting. The UA provides participants with additional skill training opportunities after the Veterans complete this program by connecting them to established apprenticeship training programs. When they enter a local UA, the Veterans are given credit for the classes they have already taken.

**Minimum Number of Training Hours Waiver**

The minimum number of training hours during the contract term is typically 8 hours. However, Fresno Area Plumbers is requesting a decrease to the minimum number of hours from 8 training hours to 4 training hours for Journeymen. Journeymen are required to take a 4-hour Med Gas Refresher course in order to keep their certification through the National Inspection Testing and Certification Corporation. Many of Fresno Area Plumbers will only need this course over the next two-year contract and will be ineligible for ETP reimbursement under the current training hour minimum requirement.

**Commitment to Training**

ETP funding will not displace the Fresno Area Plumbers’ financial 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 provided by participating employers in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

The Training Coordinator and an Administrative Assistant, who were involved in previous ETP training Agreements, will assist with administration. They will coordinate training and review attendance rosters for ETP compliance. Fresno Area Plumbers employs 10 part-time trainers who
will deliver and document training in accordance with ETP regulations. The JATC has also contracted with Strategy Workplace Communications to provide administrative services for the ETP Agreement.

**Marketing and Support Costs**

The Fresno Area Plumbers will disseminate class information throughout the year to all Apprentice and Journeymen plumbers and pipe and refrigeration fitters within the local's jurisdictions as well as the plumber, pipe, and refrigeration fitter contractors who employ them. The Fresno Area Plumbers JATC will market through newsletters, personal contacts, telephone calls, advertisements via the Internet, emails, its website and participation with the local Workforce Investment Board.

Some employers have already been recruited. Additional recruitment will be on-going. Assessment of employer-specific job requirements will continue during the contract term. The Fresno Area Plumbers requests, and staff supports, the 8% support costs used for these purposes.

**Impact/Outcome**

Certifications for Journeymen and Apprentice training include OSHA 10/30, Medical Gas Installer, Medical Gas Brazer, Foreman’s Certification, Crane Signal Person Certification, Backflow Certification, Industrial Rigger Certification, HVAC STAR Certification and various welding certifications.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

The following table summarizes performance by Central Valley 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>ET17-0911</td>
<td>$237,800</td>
<td>09/26/16 – 09/25/18</td>
<td>112</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 11,665 reimbursable hours have been tracked for potential earnings of $172,312 (73% of approved amount). The Contractor projects final earnings of 90% based on training completed by employers through June 2018.
PRIOR PROJECTS

The following table summarizes performance by Central 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>
<th>$</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>*ET14-0911</td>
<td>Fresno, Madera, Kings, Tulare</td>
<td>2/3/2014-2/2/2016</td>
<td>$179,420</td>
<td>$130,432 (72%)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*ET14-0911: According to the JATC, performance was lower than anticipated because several construction projects had been delayed preventing 20 Journeymen trainees from completing the retention period.

DEVELOPMENT SERVICES

California Labor Federation of Sacramento assisted with development of this proposal at no cost.

ADMINISTRATIVE SERVICES

Strategy Workplace Solutions of Oakland will perform administrative services for a fee not to exceed 13% payment earned.

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
4-200 Job Number 1

Trainees may receive any of the following:

Journeyman

COMMERCIAL SKILLS
- Backflow Prevention Certification
- BACnet Programming
- Brazing
- Compressor Overhaul
- Crane Signal Person Certification
  - Design & Installation of New Energy Efficient Equipment & Materials
- Direct Digital Controls – Principals of Operation, Calibration, Documentation, Shutdowns
  - Electrical Safety
  - Energy Efficiency in Existing Equipment and Materials
  - Fall Protection
  - Falling Objects
  - Foreman and Worker Responsibility
- Foreman Certification
- Green Compliance
- HVACR UA Star Certification
- Hydronics Systems and Refrigeration
- Industrial Rigging Certification
- Johnson Controls Courses
- Johnson DX9100 (Brand of Digital Controller)
  - LEED Standards
- Medical Gas Installation
- Medical Gas Installation, System Testing, Maintenance, Repair, Standards and Brazing Certification
- National Environmental Balancing Bureau Commissioning Certification
- Orbital Welding
- Orbital Welding Certification
- Pipefitting
- Robotic Total Station
- Safe Working Practices
  - Scaffolding
- Solar Installations
- Specialty Seminars for Service Work
- Start Test and Balance
- Welding
- Welding and Burning
  - Working Around Pipelines
  - Working in Confined Spaces

COMPUTER SKILLS
- 3-D Drawings Software
- Computer-Aided Drafting
OSHA 10/30 (OSHA Certified Instructor)
- OSHA 10
- OSHA 30

Class/Lab Hours
8-210 Job Numbers 2 & 3

Apprentice

COMMERCIAL SKILLS

Plumbing and Pipefitters
2nd year
- Gas Installations
- Oxy Fuel Cut & Weld
- Pipefitting, Valves, Supports
- Rigging
- Water Supply

3rd year
- Drainage
- Green Systems
- Pipefitting Layout
- Plumbing Code
- Plumbing Fixtures
- Plumbing Service
- Pumps
- Related Science
- Steam Systems
- Welding for Certification

4th year
- Advanced Pipefitting
- Advanced Plan Reading
- Advanced Plumbing
- Backflow Prevention
- Crane Signal Certification
- Crane Signal Person
- Exit Exam Review
- Hydronics
- Plumbing Code Review
- Related Math
- Rigging for Certification
- Tube Bending

5th year
- AutoCad
- AutoCad 3D
- Foreman Training
- Instrumentation & Process Control
- Medical Gas
- Review and Exit Exam
Refrigeration
2nd year
- A/C 1
- A/C 2
- Basic Electricity
- Customer Service
- Electric Controls
- Electric Motors

3rd year
- Basic Computers
- Customer Service
- Hydronics
- Refrigerant Controls
- Refrigeration 2

4th year
- Air & Water Analysis
- Basic DDC/Advanced DDC
- Building Controls
- Crane Signal Person
- Energy & Water Audits
- G-Pro
- Motor Alignment
- Pneumatics
- Start, Test, and Balance

5th year
- Boilers
- Chillers
- HVACR Performance & Compliance
- HVACR Review and Exit Exam
- HVACR STAR Mastery Review and Certification

COMMERCIAL SKILLS (All Trades)
- Backflow Certification
- Blueprint Reading
- Compressor Overhaul
- Cutting
- Direct Digital Controls
- Drawing
- Foreman Certification
- Industrial Install
- Industrial Safety
- Industry Math
- Medical Gas Install
- Rigging
- Rigging Certification
- Trade Math
- Welding
**COMPUTER SKILLS (All Trades)**
- 3D Drawings Software
- Computer-Aided Drafting

**OSHA 10/30 (All Trades)** (Certified OSHA Instructor)
- OSHA 10
- OSHA 30

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee in Job Number 1 and 210 total training hours per trainee in Job Numbers 2 and 3, regardless of the method of delivery.
Training Proposal for:

Fresno, Madera, Kings and Tulare Counties Electrical Industries Joint Apprenticeship and Training Committee

Agreement Number: ET19-0907

Panel Meeting of: July 27, 2018

ETP Regional Office: Sacramento                      Analyst: D. Jordan

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th></th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprenticehip</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retraine</td>
<td>Priority Rate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Veterans</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>☒ Yes</td>
<td></td>
<td>☐ No</td>
</tr>
</tbody>
</table>

| Counties Served:     | Repeat Contractor: |                     |              |
|----------------------|                   | ☒ Yes               | ☐ No         |

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>International Brotherhood of Electrical Contractors Local 100</th>
</tr>
</thead>
<tbody>
<tr>
<td>☒ Yes</td>
<td></td>
</tr>
<tr>
<td>☐ No</td>
<td></td>
</tr>
</tbody>
</table>

| 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>$430,050</td>
<td>$29,867</td>
<td>$459,917</td>
</tr>
</tbody>
</table>

(8%)

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>Retraineee Priority Rate Journeyman</td>
<td>Business Skills, Comm’l Skills, Computer Skills, OSHA 10/30</td>
<td>75</td>
<td>4-200 0</td>
<td>$667</td>
<td>$22.77</td>
</tr>
<tr>
<td>2</td>
<td>Retraineee Apprentice</td>
<td>Comm’l Skills, OSHA 10/30</td>
<td>86</td>
<td>8-210 0</td>
<td>$4,492</td>
<td>$22.77</td>
</tr>
<tr>
<td>3</td>
<td>Retraineee Apprentice Veterans</td>
<td>Comm’l Skills, OSHA 10/30</td>
<td>5</td>
<td>8-210 0</td>
<td>$4,716</td>
<td>$22.77</td>
</tr>
</tbody>
</table>

Minimum Wage by County: SET/Priority Industry: $22.77 per hour

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

Used to meet the Post-Retention Wage?: ☐ Yes ☐ No ☐ Maybe
Up to $2.14 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</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Journeyman Inside Wiremen (Electrician)</td>
<td></td>
<td>75</td>
</tr>
<tr>
<td>Job Number 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apprentice Inside Wireman (Electrician)</td>
<td></td>
<td>86</td>
</tr>
<tr>
<td>Job Number 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Veteran Apprentice Inside Wireman (Electrician)</td>
<td></td>
<td>5</td>
</tr>
</tbody>
</table>

INTRODUCTION

Fresno, Madera, Kings & Tulare Counties Electrical Industries Joint Apprenticeship and Training Committee (Fresno Electrical JATC) (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).

This is Fresno Electrical JATC’s third ETP Agreement in the last five years.

**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 Journeymen 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.

- Amazon Distribution Center (Fresno County)
- Madera High School
- High Speed Rail Projects, Traffic Signals
- State Center Community College Lighting Retrofit
- 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 funds Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding 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 from $26 to $21 per hour. The ETP wage for Apprentices is no less than $22.77 per hour. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $22.77, 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:** 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:** 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:** 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 giving workers the skills to stay employed in a rapidly changing industry.

**OSHA Skills 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.

Apprentice Training

**Commercial Skills:** 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:** 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). 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.

**Minimum Number of Training Hours Waiver**

The minimum number of training hours during the contract term is typically 8 hours. However, Fresno Electrical JATC is requesting a decrease to the minimum number of hours from 8 training hours to 4 training hours for Journeymen. Journeymen are required to take a 4-hour industry specific courses (Boomlift, Forklift, Scissor Lift and Skid Steer Certifications) in order to keep their certification through the National Inspection Testing and Certification Corporation. Many of Fresno Electrical JATC will only need this course over the next two-year contract and will be ineligible for ETP reimbursement under the current training hour minimum requirement.

**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 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 Journeymen 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. Staff supports this request.

**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>ET17-0928</td>
<td>$403,700</td>
<td>01/27/17 – 01/26/19</td>
<td>205</td>
<td>11</td>
<td>11</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 22,253 reimbursable hours have been tracked for potential earnings of $310,241 (77% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress.

**PRIOR PROJECTS**

The following table summarizes performance by Fresno Electrical 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>ET15-0917</td>
<td>Fresno</td>
<td>02/02/15 – 02/01/17</td>
<td>$317,520</td>
<td>$203,927</td>
<td>(64%)</td>
</tr>
</tbody>
</table>

Apprentice performance issues caused low performance in this Agreement. Some Apprentices would arrive late for class/work and Fresno Electrical JATC required their apprentices to pay for their books which made them not eligible. Fresno Electrical JATC no longer has that policy which has improved performance going forward.

**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
4 - 200

Trainees may receive any of the following:

COMMERCIAL SKILLS
- Codeology
  - Arc Flash
  - National Electrical Code
  - Other Recognized Standards (Installation Changes)
  - Plan, Build, and Use
  - Related Standards (Mandatory and Permissive Rules)
  - Special Occupancies and Equipment

- Analog/Digital Circuit Principles
  - Generators
  - Inductance/Reactance
  - Math for Electricians
  - Ohm’s Law
  - 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
  - LonWorks and Building Automation
  - Magnetic Motor Control and the Code
  - Transformers and the Code

- Voice, Data and Video
  - Audio Distribution
  - CCTV Security Surveillance
  - Computer Networking
  - Fiber Optics
  - Telephonic Interconnect

- Industry Specific Skills
  - Advanced Instrumentation and Motor Controls
  - Advanced Welding
  - Architecture Designs and Advanced Plan Reading
  - Automated Demand Response Metering
  - Basic Welding
  - Blueprints and Schematics
  - Building Automation Systems
  - Boom Lift Certification
  - CALCTP Acceptance Testing
  - Conduit Bending
  - Confined Space Entry
  - Electric Vehicle Charging Stations
  - Electric Vehicle Infrastructure Training Program
  - ESAM-TAC Energy Storage
  - Firestop Installation
  - Forklift Certification
  - Management and Monitoring of Materials
  - Medium Voltage Cable Splicing
  - Programmable Logic Controllers
  - Proper Equipment Set-Up (Green Training)
  - Proper Installation & Use of Testing & Auditing Materials & Equipment (Green Training)
  - Scissor Lift Certification
  - Skid Steer Certification
Rigging and Lifting
- Safe Working Practices
- Solar Panel Installation
- Solar Photovoltaics
- Specialized Tools
- Testing Materials and Equipment-Proper Set-Up and Use (Green Training)
- Traffic Signalling
- Understanding Changes to Industry Standards (Green Training)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- Work Flow and Resources

California Advanced Lighting Control Program
- Advanced Lighting Control Systems
- Lighting Control Strategies
- Line Voltage Switching Controls
- Low Voltage Switching Control
- Dimming Controls
- Occupancy Sensors
- Photosensors

BUSINESS SKILLS
- Advanced Time Management
- Conflict Resolution
- Creating Project Bids
- Customer Service Skills
- Decision Making Skills
- Filling Out Work Documents and Reports Accurately
- Green Awareness Training and Green Certifications
- Inventory Checklist
- Leadership Skills
- Problem Solving
- Project Management
- Teambuilding Skills

COMPUTER SKILLS
- Auto Computer-Aided Design
- Job Tracking System
- Scheduling & Planning Jobs

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

Apprentice Training

Class/Lab Hours
8 - 210
Trainees may receive any of the following

COMMERCIAL SKILLS
- 2nd Year
- AC Theory, Level I
- Application #5: Conduit Bending
- Application #6: Conduit Bending
- Application #7: Comb. Circuit Wiring
- Application #8: Transformer Connections
- Blueprints, Level I
- Codeology, Level I
- Electrical Safety-Related Work Practices, Level I
- Orientation, Level II
- Test Instruments, Level I
- Transformers, Level I

3rd Year
- AC Theory
- Blueprints
- Cad-Welding
- Code and Practices
- COMET
- Conduit Bending: Rigid & EMT, Chicago & 555
- CPR/First Aid Refresher
- Electrical Safety-Related Work Practices
- Fire Alarm Systems
- Ground Testing
- Grounding and Bonding
- Lighting Control Panels
- Motor Controls: Relays & Start/Stop
- Transformer wiring
- Transformers

4th Year
- Blueprints & Layout Yard
- Code Calculations
- Code Prep
- Field Trip to Motor Repair Shop and Folsom Power House
- Grounding and Bonding
- Lighting Essentials
- Lightning Protection
- Motor Control
- Motor Control Labs
- Motor Controls: Mag Starter & 3-Wire Control
- Motors
- PLC’s
- VFD’s

5th Year
- CALCTP
- Code and Practices
- Code Calculations
- CPR/First Aid Refresher
- EVITP
- Foreman Training: Managing the Work including NECA/IBEW Presentations
- Motor Control
- Orientation
- PV/Solar Installer
- Rigging
- Torque

- All Years
  - Automated Demand Response Metering
  - Electric Vehicle Charging Stations
  - ESAM-TAC Energy Storage

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. Reimbursement for Apprentice training is capped at 210 total training hours per trainee.
DELEGATION ORDER

Training Proposal for:
Asian Investment Corporation dba SQA Solution

Small Business

ET19-0147

Approval Date: July 11, 2018

ETP Regional Office: San Francisco Bay Area  Analyst: A. Townsend

CONTRACTOR

• Type of Industry: Services
  Technology/IT

• Priority Industry: ☑ Yes ☐ No

• Number of Full-Time Employees
  California: 19
  Worldwide: 25
  Number to be trained: 2
  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: $3,120
• In-Kind Contribution: $5,330
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</td>
<td>2</td>
<td>8-60 0-30</td>
<td>$1,560 $18.22</td>
<td>N/A</td>
</tr>
</tbody>
</table>

- Reimbursement Rate:
  - Job #1: $26 SB Priority
- County(ies):
  - San Mateo County
- Occupations to be Trained:
  - Sourcer, Executive
- Union Representation:
  - Yes
  - No
- Health Benefits:
  - N/A

SUBCONTRACTORS

- Development Services:
  - N/A
- Administrative Services:
  - N/A
- Training Vendors:
  - Recruiting Toolbox
  - San Francisco

OVERVIEW

Founded in 2001 and headquartered in Daly City, Asian Investment Corporation dba SQA Solution (Asian Investment) is a Quality Assurance (QA) software testing company that provides services to several Fortune 500 companies, requiring QA testing, consultations in recruitment and staffing specific to QA software testing.

The Company recently expanded the scope of its services to include recruitment, staffing and consultation in overall technical engineering department. Therefore, the Company needs to train a few employees in staffing, sourcing and recruitment in both QA solutions testing and engineering department requirements. Training is required for an entry level recruitment position, sourcer, that identifies and qualifies candidates with specific job skills required by clients. Training is also needed for an Executive who handles daily operations.

The company uses recruiting tools; LinkedIn and Indeed among others, for recruitment services. These tools allow easy sourcing and provide recruitment strategies necessary to qualify and assess the right candidate for the right client.
Training Plan

This is Asian Investment’s first ETP project. The Company proposes training in Business and Computer Skills. All training will be delivered with a combination of Class/Lab and CBT.

**Business Skills:** This training will be offered to the Sourcer and the Executive in strategies, leadership, sales and marketing, as well as testing functions, engineering, staffing, consulting and recruitment.

**Computer Skills:** This training will be offered to both occupations necessary to achieve customer satisfaction and provide efficient delivery of services. Trainees will learn to customize the existing Systems/Process software in sales, sourcing and recruiting, uncover the system barriers, and acquire expertise in manipulating the system to satisfy client requirements.

**Computer Based Training:** The Executive will receive CBT hours in Project and Product Management Institute Certification. The trainee will learn how to efficiently manage projects and acquire advanced professional skills in project management. The trainee will receive up to 30 hours of CBT.

➢ Training Infrastructure

The Company is ready to begin training upon approval of this proposal. The CEO will oversee training and project administration. Training will be delivered by Recruiting Toolbox in its San Francisco office.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Trainees may receive any of the following:

### Class/Lab Hours

8-60

**BUSINESS SKILLS**

- Recruiting Strategy
- Recruiting Leadership
- Sourcing
- Interviewing of candidates for clients
- Selling and Closing
- Talent Advisor
- Hiring Manager Selling

**COMPUTER SKILLS**

- SYSTEMS/Process in Sourcing and Recruiting

### CBT Hours

0-30

**COMPUTER BASED TRAINING (CBT)**

- Project and Product Management Institute (PMI) Certification

Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
DELEGATION ORDER

Retraine - Job Creation
Training Proposal for:
Bowyer Environmental Consulting, Inc.

Small Business
ET19-0150

Approval Date: June 27, 2018

ETP Regional Office: San Diego Analyst: H. Bernard

CONTRACTOR

• Type of Industry: Services
  Priority Industry: ☒ Yes ☐ No

• Number of Full-Time Employees
  California: 7
  Worldwide: 7
  Number to be trained: 10
  Owner ☒ Yes ☐ No

• Out-of-State Competition: No OSC
• Special Employment Training (SET): ☒ Yes ☐ No
• High Unemployment Area (HUA): ☐ Yes ☒ No
• Turnover Rate: 15%
• Repeat Contractor: ☐ Yes ☒ No

FUNDING

• Requested Amount: $10,400
• In-Kind Contribution: $15,439
# 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, Commercial Skills, Computer Skills, Cont. Imp., HazMat, HAZWOPER, PL-Comm Skills</td>
<td>7</td>
<td>8 - 60</td>
<td>N/A</td>
<td>$1,040</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraineepriority Rate SB &lt;100</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Imp., HazMat, HAZWOPER, PL-Comm Skills</td>
<td>3</td>
<td>8 - 60</td>
<td>N/A</td>
<td>$1,040</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Reimbursement Rate:** $26 SB Priority
- **County(ies):** San Diego
- **Occupations to be Trained:** Technical Staff, Administrative Staff, Owner
- **Union Representation:**
  - Yes
  - No
- **Health Benefits:** Job #1 only: $2.50 per hour

## SUBCONTRACTORS

- **Development Services:** Training Funding Source in Seal Beach assisted with development of this proposal for a flat fee of $500.
- **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

Bowyer Environmental Consulting, Inc., (BEC) (https://bowyerenvironmental.com/), established in 2017, is an environmental consulting firm providing property redevelopment support, litigation services, site investigation and remediation, and groundwater quality studies. Customers include commercial developers, property owners, law firms and other industries including Southwest Airlines, Sunkist Growers, and Dry Cleaners. Bowyer environmental has a small office in Huntington Beach and an office in Long Beach. Most training will occur at the Long Beach facility.
Need for Training

Three years ago BEC shifted its business model to focus on hiring newly graduated and/or less experienced engineers. This allowed the Company to mold new staff to meet growing business needs. However, this model requires significant technical training for staff. The Company must train staff on soft skills including time management, communication skills and dispute resolution to ensure staff understand the proper ways to work with clients.

BEC works in an industry where regulations and technologies change regularly. As a result, staff must be able to adjust quickly to incorporate these changes. This includes updates to software programs such as complex software modeling systems, database program updates and AutoCAD. Each customer is unique and requires diverse services. As such, the Company must ensure staff are trained on a myriad of topics to meet each customer’s needs.

Retrainee Job Creation

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

In order to meet customer’s needs, BEC is expanding existing business capacity by adding newly-hired employees to an existing job function and is committed to hiring 3 new staff (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Training will be delivered by internal subject-matter experts and vendors via Classroom/Laboratory and Productive Laboratory methodologies. Training will be provided as follows:


Commercial Skills: Aquatic Toxicology, Biological/Habitat Evaluations, Dredged Material Assessment and Management, Environmental Risk Assessment, Sediment Remediation

Computer Skills: Air Quality and Dispersion Modeling, AutoCAD, Environmental/Data Visualization, Geotechnical and Geoenvironmental Boring Log Software and Web Design

Continuous Improvement: Process Improvement, Quality Improvement and Goal Setting

Certified Safety Training

Hazardous Waste Operations and Emergency Response Standard (HAZWOPER): This training is a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 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.
**Hazardous Materials (HAZMAT):** This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. (In this proposal, trainees 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 is the Department of Transportation.

**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.

PL training will be provided to seven Technical Staff in Commercial Skills. PL training in the field is essential for Technical Staff as it enables the Company to teach. BEC expects that production will be slowed while training is occurring and productivity will be greatly impacted. The Company is requesting a trainer-to-trainee ratio of 1:2, as the staff frequently work in pairs. Total PL training hours will not exceed 24.

**Training Infrastructure**

BEC’s President will oversee and administer the ETP project. The Company’s management staff will assist in scheduling training and submitting completed ETP training rosters. In addition, Training Funding Source was retained to assist with administration.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 60 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Accounting
- Budgeting and Financial Management
- Client Building and Negotiations
- Communication Skills
- Contract Development
- Leadership Skills
- Marketing Skills
- Organizational and Time Management
- Product /Service Knowledge
- Project Analysis and Management
- Technical Writing
- Team Building

**COMMERCIAL SKILLS**
- Air Quality and Permitting
- Aquatic Toxicology
- Biological/Habitat Evaluations
- Building industry measurements
- California Environmental Quality-Act (CEQA)
- Confined Space
- Dredged Material Assessment and Management
- Electrical Safety
- Equipment Operator
- Engineering and Geology procedures
- Environmental Techniques
- Environmental Risk Assessment
- Excavation Safety
- Green Building
- Green Remediation
- Industrial Hygiene Techniques
- Leadership in Energy and Environmental Design (LEED)
- Programmable Logic Controller (PLC) Programing
- Remedial Applications and Technology
- Sediment Quality Assessments
- Sediment Remediation
- Stormwater Planning and Management
- Wetlands Evaluations

**COMPUTER SKILLS**
- Air Quality and Dispersion Modeling
- Aquifer Test Solution Software (AQTESOLV)
- ARC-GIS
- AutoCAD
- Contaminant Transport Modeling
• Computer Graphics, Design & Drafting
• Database Software Program Upgrades
• Document Conversion
• Environmental/Data Visualization
• Environmental Economics
• ESRI (Environmental Systems Research Institute)
• Financial Accounting
• Foxit Phantom PDF
• Geotechnical and Geoenvironmental Boring Log Software (gINT)
• Google Earth Pro-Sketchup
• Ground Water Modeling
• Human Health Risk Assessment and Modeling
• Information Technology Program Certifications
• Johnson-Ettinger Model
• Litigation Software Programs
• Microsoft Certification Programs, Office
• Modular Water Flow (MODFLOW)
• ProUCL- Computing Statistical Intervals
• Rockworks
• SharePoint Development, Design and Management
• Scientific Data Evaluation
• Infiltration Model Software (SESOIL)
• Statistical Analysis Software
• Stator
• Surfer
• Vadose Zone Modeling
• Web Design and Graphics Software

CONTINUOUS IMPROVEMENT
• Goal Setting
• Planning
• Process Improvement
• Quality improvement

HAZARDOUS MATERIALS
• Hazardous Waste Manifests
• Hazardous Materials

HAZWOPER
• Hazwoper
• Hazwoper Update
• Hazwoper Management

**PL Hours**
0 – 24

PRODUCTIVE LAB (PL) (limited ratio 1:2)
• Dust Monitoring and Control
• Environmental Monitoring
• Indoor Air Testing
• Groundwater and Vadose Zone Well Installation
• Groundwater Injection Program
- Groundwater Pump Operation and Maintenance
- Groundwater Well Development
- Groundwater Well Sampling
- Stormwater Monitoring
- Soil Sampling
- Subslab Sampling
- Vapor Extraction System Operation and Maintenance
- Vapor Probe Survey

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

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:

D. T. Mattson Enterprises, Inc. dba Pro-Line Racing

Delegation ≤ $75,000 Single Employer

ET19-0152

Approval Date:  July 2, 2018

ETP Regional Office:  San Diego  Analyst:  M. Ibarra

CONTRACTOR  www.prolineracing.com

- Type of Industry:  Manufacturing
- Priority Industry:  Yes  No
- Number of Full-Time Employees  Small Business
  - California:  47
  - Worldwide:  47
  - Number to be trained:  48
  - Owner:  Yes  No
- Out-of-State Competition:  4416(i)(1)
  4445(c)
- Special Employment Training (SET):  Yes
- High Unemployment Area (HUA):  Yes
  - 48  Number of trainees in HUA location
- Turnover Rate:  11%
- Repeat Contractor:  Yes

FUNDING

- Requested Amount:  $74,880
- In-Kind Contribution:  $72,944
## 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>ETP Required Wage*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HUA Priority Industry</td>
<td>Business Skills, Computer Skills, Continuous Improv, Mfg Skills, PL-Mfg Skills</td>
<td>44</td>
<td>8-200 0-100</td>
<td>$1,560</td>
<td>*$12.53</td>
</tr>
<tr>
<td>2</td>
<td>HUA Priority Industry</td>
<td>Busines Skills, Computer Skills, Continuous Improv, Mfg Skills, PL-Mfg Skills</td>
<td>4</td>
<td>8-200 0-100</td>
<td>$1,560</td>
<td>*$11.00</td>
</tr>
</tbody>
</table>

*ETP Required Wage is ETP’s modified High Unemployment Area wage when trainees are located in an HUA (regardless if a wage modification is requested). It will be made a condition of contract that trainees will never be paid less than the statewide or local minimum wage rate in effect at the end of retention regardless of wage expressed in this table & Contract.

- Reimbursement Rate: $26 Priority/ Program Initiatives
- County: Riverside
- Occupations to be Trained: Administrative Support Staff, Sales/Marketing Staff, Design Staff, Production Staff, Supervisor/Manager, and Owner
- Union Representation for Trainees: Yes
- Health Benefits: (Employer Paid to Meet ETP Wage) Up to $0.53 per hour may be included to meet ETP Required Wage for Job # 1.

## OVERVIEW

<table>
<thead>
<tr>
<th>Year Company Founded:</th>
<th>1982</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Headquarters:</td>
<td>Single location Banning, California</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Facility location(s) where training will occur (cities &amp; Counties)</th>
<th>Banning (Riverside County)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature of Business</td>
<td>Designs and manufactures wheels, tires, accessories, and bodies for 1/10-scale radio-controlled (RC) cars and trucks.</td>
</tr>
<tr>
<td>Customer Base:</td>
<td>Race Car Owners</td>
</tr>
<tr>
<td>Business / Industry Needs / Changes</td>
<td>The RC market is extremely competitive and can shift dramatically. Consequently, the Company must keep up with technology as customers demand high performance parts. Additionally, the Company’s competitors are outsourcing the majority of manufacturing overseas for a price advantage.</td>
</tr>
</tbody>
</table>
Training Plan:

Need for Training:
- **New Equipment/Software:** Pro-Line Racing is purchasing a new five-axis Computer Numerical Control (CNC) machine with a new five-axis software system. The new machine and software system will assist the Company’s Tool and Die workers to be more efficient.
- **Process Improvement:** Pro-Line will continue to deliver Lean manufacturing training to reduce bottlenecks, streamline operations, and improve customer satisfaction.

Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- [x] Class/lab
- [ ] E-Learning
- [x] CBT
- [x] Productive Lab

<table>
<thead>
<tr>
<th>Business Skills</th>
<th>Computer Skills</th>
<th>Continuous Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing Skills</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Productive Laboratory</th>
<th>New Equipment</th>
<th>New Production Procedures</th>
<th>Certification Standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>PL Hours per-trainee: 24</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Trainees receiving PL: 27</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Occupations Receiving PL Training: Production Staff</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The PL instructor will be dedicated to training. The trainer-to-trainee ratio will be 1:1, and trainees will receive no more than 40 hours of PL.

**Job Creation Justification**
- Expanding existing business capacity by adding newly-hired employees to an existing function; or,

**Training Infrastructure & Administrative Plan**

**Trainers:** In-house subject-matter experts and, if necessary, vendors.

**Project Manager:** Accounting Manager, who managed prior ETP contract, will oversee the overall administration and implementation (coordinating & scheduling) of training with assistance of support staff.

**Administrative Duties:** Will contract with an administrative subcontractor to assist with project administration. Staff will submit copies of completed attendance rosters to administrative subcontractor for uploading in the ETP online system.

**Repeat Contract**

- **Number Of Agreements in last 5 years:** 1
- **Training provided in last Agreement:**
  - New equipment and software systems training to support new
laser system and an automated inventory system.
- Average of 57 training hours to 28 trainees

**Difference in Training Plan:**
- Banning is now located in a High Unemployment Area; therefore, more trainees meet ETP wage eligible. The increased funding amount is due to the increased number to train.
- New Equipment & Software training need

<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>ET16-0197</td>
<td>Banning</td>
<td>9/15/2015-9/14/2017</td>
<td>$39,780</td>
<td>$39,780 (100% )</td>
</tr>
</tbody>
</table>

**RECOMMENDATION**

Staff recommends approval of this proposal and modifications.

**SUBCONTRACTORS**

<table>
<thead>
<tr>
<th>Subcontractor Type</th>
<th>Subcontractor Name</th>
<th>City</th>
<th>Cost / %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development</td>
<td>Training Funding Source</td>
<td>Seal Beach, CA</td>
<td>$3,900</td>
</tr>
<tr>
<td>Administrative</td>
<td>Training Funding Source</td>
<td>Seal Beach, CA</td>
<td>Not to exceed 13% of earned amount</td>
</tr>
<tr>
<td>Training Vendors</td>
<td>To Be Determined</td>
<td></td>
<td>N/A</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 200

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Lead with Purpose
- Leadership Skills
- Sales Skills
- Teambuilding Techniques

**COMPUTER SKILLS**
- Adobe
- Autodesk
- Customer Relationship Management (CRM) System
- Dreamweaver
- Enterprise Resource Planning (ERP) System
- Flash/CSS
- Inventory Management and Control
- MS Office
- Paperless Solution
- Solidworks
- Starship
- Social Media

**CONTINUOUS IMPROVEMENT**
- 2 Second Lean Principles
- Metric Development and Maintenance
- Plant Layout and Flow Analysis
- Research and Development System
- Scrap Reduction Techniques
- Set up Minimization

**MANUFACTURING SKILLS**
- CNC Controlled Processes
- Equipment Operations
- Good Manufacturing Practices
- Injection Molding
- Equipment Maintenance & Troubleshooting
- Raw Materials
- Rubber Chemistry and Properties
- Shop Procedures/Standard Operating Procedures
- Thermoforming
- Tool Design & Production

Productive Lab Hours
0 – 24

**MANUFACTURING SKILLS (1:1 training ratio)**
- Equipment Operations and Maintenance
CBT Hours
0 – 100

BUSINESS SKILLS
- Payroll Processes, Level 1 (80 minutes)
- Payroll Processes, Level 2 (70 minutes)
- Standard Operating Procedures (60 minutes)
- E-Verify (40 minutes)
- Year-End Reconciliation (45 minutes)
- Payroll Administrators (75 minutes)
- Performance Improvement (30 minutes)
- Training Processes and Procedures (120 minutes)

COMPUTER SKILLS
- Self-Service Portal (85 minutes)
- Software Templates (60 minutes)
- Internet, Social Media, and Electronic Communication (60 minutes)

Reimbursement for retraining is capped at 200 total hours per-trainee, regardless of method of delivery.
Retrainee - Job Creation
Training Proposal for:

Firstline Security Systems, Inc.

Small Business
ET19-0145

Approval Date: June 25, 2018

ETP Regional Office: San Diego

Analyst: J. Davey

CONTRACTOR

- Type of Industry: Construction
  Services
- Priority Industry: Yes No

- Number of Full-Time Employees
  California: 55
  Worldwide: 55
  Number to be trained: 58
- Owner Yes No
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 11%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: $49,972
- In-Kind Contribution: $62,324
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, Cont. Imp., OSHA 10/30</td>
<td>55 8-200 0</td>
<td>$832</td>
<td>$17.03</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Business Skills, Comm'l. Skills, Cont. Imp., OSHA 10/30</td>
<td>3 8-200 0</td>
<td>$1,404</td>
<td>*$14.19</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): Orange, San Diego
- Occupations to be Trained: Administration, Engineer, Installation, Supervisor/Manager, Owner
- Union Representation: Yes, No
- Health Benefits: Job #’s 1 & 2: $2.50 per hour

SUBCONTRACTORS
- Development Services: Training Funding Source (TFS) in Seal Beach assisted with development for a flat fee Of $2,900.
- Administrative Services: TFS will also provide administrative services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW
Located in Anaheim and founded in 1992, Firstline Security Systems, Inc. (Firstline)(www.FirstlineSecurity.com) designs, installs and services integrated security solutions in the commercial, utilities, healthcare and financial services industries. The Company’s products include surveillance systems, access control systems, alarm and threat detection/deterrence systems, identity recognition systems and related customized security systems. Frontline works directly with its clients to design and install a customized solution for its security needs. (Firstline does not provide security-monitoring services). The Company
maintains two facilities: a San Diego office and its main office in Anaheim, where training will take place.

Due to increasing competition, Firstline must train its employees in skills to increase efficiencies in all areas to compete in California. Changes in new building codes, building standards, and environmental improvements in the construction industry require Firstline to innovate and expand its services, while improving quality assurance and productivity. The Company’s clients also demand the latest innovative and sustainable engineering designs for its security systems.

In addition, the increase of Computer-Aided Design software (CAD) use in the engineering and installation process is now an industry requirement. The importance of CAD software training, as well as project management and time management techniques, are areas that Firstline’s employees need to keep pace in the industry. The Company must also improve its staff industry knowledge to provide better service to its clients. Finally, Firstline's clients require increased communication, evaluation and cooperation with construction teams and internal staff.

Training is crucial to the vitality and growth of the Company, will increase employee satisfaction and communication, and create an environment where creativity can thrive. The Company's principals encourage the development of its staff's skills in all areas to promote the growth of firm’s collective knowledge, to better serve its clients, and be a leader in its industry.

**Training Plan**

**Business Skills:** Training will be offered in Customer Relations, Goal Setting, Leadership, Product & Service Knowledge and related skills.

**Commercial Skills:** Training will be offered in Access Control Systems, Alarm Systems, Product & Service Knowledge, Threat Deterrence and related skills.

**Computer Skills:** Training will be offered in Adobe software, Certified Wireless Network Administrator, Cloud Solutions, CAD, MS Office, related software and network skills.

**Continuous Improvement:** Training will be offered in Performance Improvement, Quality and Productivity Improvement, Teamwork and related skills.

**Certified Safety Training**

OSHA 10/30 training is provided as a series of “bundled” courses, customized 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. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. Firstline will train selected Installation, Engineering and Supervisors/Managers in a customized, “bundle” of skills to meet their specific OSHA safety requirements.

**Modifications**

Firstline requests an increase in the maximum range of hours from 60 to 200. The Company plans to train select staff (25 Installation) for more than 60 total hours.
Training Infrastructure

Firstline is ready to begin training upon approval. The CFO, the San Diego Office Branch Manager, and internal administrative staff will coordinate to ensure that training materials are prepared, scheduled, staff is released for training and ensure that attendance forms are completed. The Company also retained Training Funding Source to assist with administration. Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

BUSINESS SKILLS
- Admin Processes & Procedures
- Coaching/Communication
- Customer Relations
- Goal Setting
- Leadership
- Marketing & Business Development/Sales
- Performance Management
- Planning
- Product and Service knowledge
- Time Management

COMMERCIAL SKILLS
- Access Control/Systems, Intercoms, CCTV, Emergency Call System
- Alarm: ACO-6029 (Alarm Company Operator)
- Audit Platforms (Security System)
- CSA Security, Trust & Assurance Registry
- Engineering & Design
- Electrical: Computer, Telephone, Video Integrators
- Healthcare Security Certifications (ex: FISMA, HIPAA, etc.)
- Identity & Access Management Strategy Development
- Incident Response
- Installation
- ISO 27001: 2013
- NERC/FERC, PCI DSS, PA-DSS Compliance (National & Federal Regulatory Standards)
- Product and Service knowledge
- Risk Assessments-Cyber
- Security Networks/Systems/Response/Maintenance
- Solution Implementation
- Standard Operating Procedures
- Systems Integration & Testing
- Video Analytics: Surveillance Cameras, Facial Recognition
- Network Access Control/Protection, Application Protection, Endpoint Protection
- NIST 800-53 Control Compliant, COMPTIA Trustmark Certification
- Product and Service knowledge
- PCI DSS version 3.0 Level 1 Certified (ROC), HIPAA Compliance, SSAE-16 SOC 2, Type II Certification
- Security Operations: Networks/Systems/Response/Maintenance
- SuperScale Analytics
- Threat Deterrence, Simulation and Response, ThreatWatch®, Threat Recon Unit
COMPUTER SKILLS
- American Society for Industrial Security Physical Security Professional
- Adobe (PDF, InDesign, Photoshop, Illustrator, etc.)
- Certified Wireless Network Administrator
- Cloud Solutions
- Customer Relationship Management
- CAD
- Crystal Reports
- Domo
- Dropbox
- ERP (Syspro) Quickbooks/SAP, Timberline
- E-Mail Marketing Tools
- Microsoft Office/Project/Sharepoint, Microsoft Certified Systems Engineer
- Payroll/HR
- Time Tracking - About Time
- WordPress, Web Design and Graphics Software

CONTINUOUS IMPROVEMENT
- ISO
- Performance Improvement
- Process/Quality Improvement/Efficiency/Workflow
- Quality and Productivity Improvement
- Teamwork
- Quality Management Office

OSHA 10/30 (Certified OSHA Instructor)

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:
Four Star Meat Co., Inc.

Small Business
ET19-0133

Approval Date:  June 25, 2018
ETP Regional Office:  North Hollywood  Analyst:  E. Wadzinski

CONTRACTOR

• Type of Industry:  Manufacturing
  Priority Industry:  ☑ Yes  □ No

• Number of Full-Time Employees
  California:  45
  Worldwide:  45
  Number to be trained:  47
  Owner  ☑ Yes  □ No

• Out-of-State Competition:
  NAICS Code Eligible

• Special Employment Training (SET):  □ Yes  ☑ No
• High Unemployment Area (HUA):  □ Yes  ☑ No
• Turnover Rate:  13%
• Repeat Contractor:  ☑ Yes  □ No

FUNDING

• Requested Amount:  $49,660
• In-Kind Contribution:  $55,040
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, Mfg. Skills, Cont. Imp.</td>
<td>45</td>
<td>8-140 0</td>
<td>$1,040</td>
<td>$17.54</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraine SB &lt;100 Job Creation</td>
<td>Business Skills, Computer Skills, Mfg. Skills, Cont. Imp.</td>
<td>2</td>
<td>8-140 0</td>
<td>$1,430</td>
<td>*$14.62</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 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: Production, Administration, Sales, Supervisor/Manager, Owner
- Union Representation: □ Yes □ No
- Health Benefits: Job #’s 1 & 2: $2.50 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach developed the proposal for a flat fee of $2,900.
- Administrative Services: TFS will also provide administration services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Located in Long Beach and founded in 1969, Four Star Meat Co., Inc. (FSM) (fourstarmeat.com) is a family-owned and operated business that provides meat processing and wholesale food distribution services. Customers include fast food, coffee shops and restaurant establishments. The Company produces 100% pure ground beef patties, steaks, ground pork burgers and other cuts of meat. FSM also distributes poultry, cheese, turkey, ham and bacon, pork, gyros, seafood, pastrami, roast beef, fries and hash browns. FSM recently added fresh
and frozen protein items, produce and dairy to its product list in an effort to become a one-stop-shop its customer base.

In 2017, FSM acquired another company, which expanded its product line and purchasing power within the industry. Since then, FSM’s customer base has almost doubled. To address the expansion, the Company recently added a second shift, and is now operating 24 hours a day, seven days a week. To support this transition, FSM must implement new customer service and sales techniques; as well as new processes and procedures.

Need for Training

FSM is also migrating to a new software system, Target. This new software includes a wholesale and distribution edition to address FSM’s rapid growth. Training on this software system will be companywide as it provides software related to finance, customer information, order fulfillment, sales data, inventory control, radio frequency bar coding, demand planning and purchasing and vendor management.

FSM is also implementing Appian, a new software program to become more efficient in routing and scheduling for multi-stop and multi-order fleet operations. This software will keep drivers on time, improve vehicle utilization and maintain cost control of distribution and service operations.

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.

FSM has committed to hiring two new employees (Job Number 2) to support an increased business demand related to recent acquisition; as well as, to support transition to a 24 hour a day, seven days a week, work environment.

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

This is FSM’s second ETP Agreement, and the second in the last five years. Training In the first proposal focused on software program, Entrée. In this proposal, training will include Business, Computer, Continuous Improvement and Manufacturing Skills.

Business Skills: Training will be offered to all occupations and include Accounting/Auditing, Coaching/Communication, Customer Relations, Goal Setting, Inventory Control, Product Knowledge, Project Management, Selling tactics, Time Management and Writing.

Computer Skills: Training will be offered to all occupations. Training includes Appian Routing System, Crystal Reports, Electronic Data Interchange, E Commerce tools, E-Mail marketing tools, Microsoft Office, SQL Server, Script writing for Report generation and Target System.

Continuous Improvement: Training will be offered to all occupations in Process Improvement, Quality Improvement and Leadership. Training will provide skills to provide quality products while improving inventory control and on-time delivery, to meet increasing customer demands. Leadership courses will include Team Building and Negotiation Skills.
Manufacturing Skills: Training will be provided to Production and Managers/Supervisors. Training will include equipment and production processes, maintenance, correct sanitation and changeover practices. Staff will be cross-trained on equipment and processes to address the Company’s shift to operating 24 hours a day, seven days a week.

Training Infrastructure

FSM is ready to start training upon approval. The Office Manager, who was lead coordinator of FSM’s prior project, will continue to oversee training and project administration. FSM has also retained Training Funding Source (TFS) to assist with the administration. In-house experts and vendors as needed will deliver training.

Training Hours Limitation

FSM is requesting to modify the maximum number of training hours allowed for a Small Business from 60 hours to 140 hours. An estimated 15 trainees in Production, including three Supervisors/Managers, may need up to 140 hours of training. Training for these occupations focuses on equipment operations and specialized processes for meat cutting. Development of these specialized skills in this type of industry would reasonably require up to 140 hours.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by FSM 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>ET16-0354</td>
<td>Long Beach</td>
<td>01/29/16 – 01/28/18</td>
<td>$43,680</td>
<td>$43,680</td>
<td>(100%)</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab Hours

8-140 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Accounting/Auditing
- Coaching/Communication
- Credit & Collection Skills
- Customer Relations
- Goal Setting, Company Vision
- Inventory Control
- Product Knowledge
- Project Management
- Selling Tactics
- Time Management
- Writing

**COMPUTER SKILLS**
- Appian Routing System
- Crystal Reports
- Electronic Data Interchange
- E Commerce Tools
- E-Mail Marketing Tools
- Microsoft Office
- SQL Server
- Script Writing for Report Generation
- Target System

**CONTINUOUS IMPROVEMENT**
- Quality Improvement
- Process Improvement
- Leadership

**MANUFACTURING SKILLS**
- Equipment Operations
- Good Manufacturing Practices
- Food Inspection Techniques
- Inventory Control-Cycle Counting
- Meat Cutting/Processing Techniques
- Operations Skills (Distribution, Receiving, Shipping, Order, Picking, Packing)
- Quality Control
- Mechanical Skills Training

Note: Reimbursement for retraining is capped at 140 total hours per-trainee, regardless of method of delivery.
Training Proposal for:

Hi-Temp Insulation, Inc.

Agreement Number: ET19-0189

Approval Date: July 13, 2018

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainee Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Manufacturing Aerospace and Defense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Ventura</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: 524</td>
<td>U.S.: 524</td>
<td>Worldwide: 524</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>14%</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>$67,860</td>
<td>$0</td>
<td>$0</td>
<td>$67,860</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $104,373
**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>Retraining Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Improv., Haz. Mat., Literacy Skills, Mfg. Skills</td>
<td>145</td>
<td>8-200</td>
<td>0</td>
<td>$468</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $16.70 per hour for Ventura County.

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

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

Up to $2.24 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>Production Staff</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Quality Assurance Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Manager/Supervisor</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1964 and located in Camarillo, Hi-Temp Insulation, Inc. (Hi-Temp) (www.hi-tempinsulation.com), is a manufacturer of acoustic and thermal insulation products for the Aircraft, Missile and Aerospace industries. The Company specializes in metal foil, soft goods and sewn insulation designs. Its products include molded fiberglass and duct insulation, metal foil blanket insulation, thrust reverser blankets, multi-layered insulation blankets, soft flex blankets and other sewn and quilted products for protection from extreme temperatures. With over 50 years of extensive experience in providing solutions for solving thermal and acoustic problems, Hi-Temp has become a major sub-contractor for critical industry programs such as the Space Shuttle, Boeing and Airbus commercial aircraft, Atlas and Delta Rockets, F-16, F-18, F-22 and JSF Fighter Jets. Major customers include Boeing, Spirit, UTAS, Northrop, Middle River and Lockheed Martin.

Hi-Temp is operating in a highly competitive aerospace industry. Maintaining the technical expertise of its workforce provides competitive advantages in contract bidding and acquiring new business. Hi-Temp was recently awarded new contracts to build highly rated platforms for 737 Max, A320 NEO, 777X and Lockheed F35, which included new equipment, robotics and manufacturing processes. As the business grows and technology advances, the Company constantly strives to improve its products and services to meet customer expectations and
demands. With new product lines and business upgrades, Hi-Temp anticipates a 5% increase in sales and shipments each year.

PROJECT DETAILS

This will be Hi-Temp’s fourth ETP proposal, its third in the last five years. In the previous proposal, training focused on new products, new equipment operation, advanced computer software and new skill sets for workers in all departments. The training in this proposal focuses on the expansion of its product offerings, which accounts for its continuous increase in business. The need for training is driven by new business, customer demands, industry regulatory requirements, technological advances and back-filling for retired workers by providing additional skills to the incumbent workforce. The acquisition of additional platforms and pursuit of additional business require increased manufacturing and technical skills training.

Hi-Temp recently invested $250K in new equipment and technology, including laser cutting, welding and press operation machines, tools, tablets, and robots. Structuring depth of knowledge and technical expertise to build high temperature and insulation aerospace products requires various levels of training and is key to the growth and success of the Company. Training supports initial and renewed proficiencies in the operation and safety protocols for machinery and equipment utilized in the processes, industry standard requirements, continuous process improvements, production developments, quality control and customer specifications. ETP funding directly supports training in these areas, which will increase employees’ skills and support updated production equipment and processes. These newly added skills will support Hi-Temp with efficiently producing the highest quality safety, temperature-critical products in the aerospace industry.

Training Plan

Training will be provided via Classroom/Laboratory and Videoconference in the following:

Business Skills: This training will be offered to all occupations. Training will focus on sharpening skills to increase operational acumen through a combination of job performance training addressing communication practices, interpersonal skills, time management, team dynamics, leadership development, goal setting and achievement tracking. Business training builds individuals’ skills of effective performance.

Computer Skills: This training will be offered to all occupations in various software applications and in the skills necessary to support the business operations. Training will enable trainees to effectively use the Company’s automated systems to provide efficient and effective customer services and internal processes.

Continuous Improvement: This training will be offered to all occupations focusing on products, updates, project management, process improvements, operation methodologies and dedication to a safety improvement culture.

Hazardous Materials: This training will be offered to all occupations. Trainees will learn proper techniques, knowledge and communication on handling hazardous materials and address appropriate response actions on potential hazards exposure.

Literacy Skills: This training will be offered to Production Staff and Maintenance Staff in a bi-lingual environment to improve conversational and comprehension skills while immersing English as a second language, which will increase staff’s speaking, listening and comprehension skills in the workplace.
**Manufacturing Skills:** This training will be offered to Production Staff, Quality Assurance Staff, Managers/Supervisors and Maintenance Staff. Training will focus on equipment operation, manufacturing processes, quality assurance and inspection. Trainees will gain skills to increase performance, improve efficiency and product quality, and critical thinking to form a solid business operation.

**Commitment to Training**

Hi-Temp has an annual training budget of approximately $1 million. The Company’s current training consists of new products, job specific skills, cross training, new employee orientation, safety training and basic job functions training. Most training is delivered via class/lab and on-the-job training. ETP funding will allow Hi-Temp to supplement its current training efforts to keep up with customer demands, technological advances and business growth. ETP funds will enable the Company to provide more training and help retain a strong workforce.

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 is scheduled to begin upon Panel approval and will be delivered on-site by 70 in-house experts and vendors, as needed. Two Training Department Specialists and a Human Resources Manager will oversee ETP training and all administrative responsibilities.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes performance by Hi-Temp 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>*ET16-0432</td>
<td>Camarillo</td>
<td>05/01/16 – 04/30/18</td>
<td>$130,563</td>
<td>$67,067 (51%)</td>
<td></td>
</tr>
<tr>
<td>ET12-0429</td>
<td>Camarillo</td>
<td>06/23/12 – 06/22/14</td>
<td>$287,562</td>
<td>$276,139 (96%)</td>
<td></td>
</tr>
</tbody>
</table>

*ET16-0432 – Although Hi-Temp only achieved 51% of its approved amount, 222 trainees completed training and retention for a total of 4,389 eligible hours. The Company was unable to utilize 100% of ETP funding due to a key staffer who left the Company. As a result, training was not documented and therefore not included. To ensure the success of this proposal, the Company has taken corrective action and designated two Training Specialists and one Human Resources Manager to oversee ETP training and all administrative responsibilities, including recording training completed. Going forward, staff has coordinated and communicated with trainers and trainees to ensure all training is properly documented on a timely manner. This proposal has been right-sized to more closely match prior performance.
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**
- Problem Solving
- Customer Service
- Time Management and Organization
- Delegating
- Goal Setting
- Compliance
- Appropriate internet and Email Use

**COMPUTER SKILLS**
- Mapics
- Webdocs
- FormDocs
- Microsoft Office – Intermediate and Advanced Levels
- Access
- VPI (Visual Planning – Master Scheduler)
- Computer Applications

**CONTINUOUS IMPROVEMENT**
- Kaizen
- 6S Production
- Process Improvement
- Master Trainer Training (Train the Trainer)
- AS9100D
- Managing Change
- Effective Communication Skills
- Managing Projects
- Management and Leadership Skills
- Critical Thinking Skills

**HAZARDOUS MATERIALS**
- Hazard Communication Policy and Procedure
- Globally Harmonized System for Hazard Communication
- Spill Prevention and Response
- Compliance and Safety Practices and Procedures

**LITERACY SKILLS**
- Vocational English as a Second Language
- Basic Workplace Terminology
- Written Communications
- Understanding Manuals and Reports
- Locating Information on Charts and Graphs
MANUFACTURING SKILLS

- Equipment Operation and Safety
- Assembly Procedures
- Manufacturing Practices
- Parts & Products Manufacturing
- Coaching Skills
- Inventory Control
- Material Handling & Safety
- Preventative Maintenance

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

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

Training Proposal for:
Kern Steel Fabrication, Inc.

Small Business
ET19-0142

Approval Date: June 22, 2018

ETP Regional Office: North Hollywood  Analyst: M. Paccerelli

CONTRACTOR

• Type of Industry: Manufacturing

• Number of Full-Time Employees
  California: 87
  Worldwide: 87
  Number to be trained: 79

• Out-of-State Competition: NAICS Code Eligible

• Special Employment Training (SET): Yes No

• High Unemployment Area (HUA): Yes No

• Turnover Rate: 9%

• Repeat Contractor: Yes No

FUNDING

• Requested Amount: $49,920

• In-Kind Contribution: $49,229
**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>Mfg. Skills, Business Skills, Computer Skills, Cont. Imp.</td>
<td>67</td>
<td>8-60</td>
<td>624</td>
<td>*$12.53</td>
</tr>
<tr>
<td>2</td>
<td>Priority Rate</td>
<td>Mfg. Skills, Business Skills, Computer Skills, Cont. Imp.</td>
<td>12</td>
<td>8-60</td>
<td>676</td>
<td>*$11.00</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.

- **Reimbursement Rate:** Job #’s 1 & 2: $26 SB Priority
- **County(ies):** Kern
- **Occupations to be Trained:** Production Staff, Quality/Inspection Staff, Administrative Staff, Engineering Staff, IT Staff, Manager, Owner
- **Union Representation:** ☐ Yes  ☒ No
- **Health Benefits:** Job # 1: $2.50 per hour  Job # 2: $0.16 per hour

**SUBCONTRACTORS**

- **Development Services:** California Manufacturing Technology Consulting (CMTC) in Torrance assisted with development for a flat fee of $4,900.
- **Administrative Services:** CMTC will also provide administration services for an amount not to exceed 13% of earned funds.
- **Training Vendors:** To Be Determined
OVERVIEW

Founded in 1969 and located in Bakersfield, Kern Steel Fabricated, Inc. (KSF) (www.kernsteel.com) is a small business family-owned company specializing in designing and building fabricated structural and miscellaneous steel structures and parts, and aircraft maintenance systems. KSF also provides specialty painting and coatings of its products. Its customer base includes general contractors, federal government, and oil and gas companies.

This will be KSF’s first ETP Agreement. Its customers and industry demands drive the Company’s training needs. The international market for its products has aggressive competition; as a result, the Company must continuously target efforts to improve productivity. Customers are demanding lower prices and more transparency requiring KSF to invest in systems that are more sophisticated. Since the industry requires tractability, the Company’s quality system is based on the international ISO standard. Both the customers and industry require that KFS maintain this quality standard, which led the Company to upgrade its ERP system, requiring more employee training.

KSF has invested $420,000 in automation and robotic technology. The incorporation of more automation and robotics will not lead to layoffs. Training its workers to operate the new equipment will leverage its increased capacity to meet customer demand. As the Company continues to modernize its equipment, it must provide trainees with the skills to maximize the effectiveness of newly acquired technology. Trainees must understand how to integrate the data from the new robotics to the ERP system. Proficiency in operations will be critical to ensure that its workers are able to utilize the functionality of new technology and equipment. Training will take place at the Company’s Bakersfield facility.

Retraineec - Job Creation

KSF has experienced significant growth in the past few years. As the Company continues to expand sales and grow its business, the Company must expand its workforce. KSF is committed to hiring 23 new employees (Job Number 2) over the next six months in production to operate the new equipment and focus on superior customer service. The commitment to train 23 new employees is included in this proposal.

The date-of-hire for these 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

Manufacturing Skills: Training will be offered to Production, Engineering and Management Staff in blueprint reading, preventative maintenance, powder coating and other technical skills.

Continuous Improvement: Training will be will be offered to all occupations to improve efficiencies and operations through implementing lean, team building and related training.

Computer Skills: Training will be will be offered to all occupations in the Company’s new ERP system and improve operational effectiveness. Production, Engineering and Management Staff will be provided training in Solidworks, Tekla, and Strumis to meet both customer and industry requirements. Administrative, Engineering and Management Staff will be offered Microsoft Office and Sharepoint training.
**Business Skills:** Training will be provided to all occupations to effectively interact with internal and external customers; better assess and meet customer expectations; manage goals and priorities; and identify opportunities to increase sales in the global market.

**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 Kern County qualify for HUA status under these standards.

- **Wage Modification**

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. KSF is requesting a 25% wage modification from the ETP Standard Minimum Wage to the HUA Minimum Wage from $16.70 to $12.53 per hour in Job Number 1 and from $13.66 to $11.00 in Job Number 2 in Kern County.

**Training Infrastructure**

The Human Resources Manager will oversee this project. KSF has retained CMTC to manage the recordkeeping and to ensure that all training records meet ETP compliance. Additional internal staff will assist in collecting rosters and working with CMTC. Training will be delivered by in-house experts and vendors as needed.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8-60

Trainees may receive any of the following:

BUSINESS SKILLS
- Effective Meeting Skills
- Customer Service
- Time Management Skills
- Global Business and Exporting

COMPUTER SKILLS
- Enterprise Resource Planning
- Microsoft Office
- SolidWorks
- Wireless Networks
- Spectrum
- Tekla
- Strumis
- Sharepoint

CONTINUOUS IMPROVEMENT
- ISO 9001:2015
- Inventory Management
- Process Improvement/Lean
- Leadership

MANUFACTURING SKILLS
- Preventative Maintenance
- Programmable Logic Controllers
- Electrical Skills
- Basic Machining
- Fabrication/Shop Math
- Welding & Welding Symbols
- Machine Maintenance
- Blueprint Reading
- Steel Blasting
- Steel Painting
- National Association of Corrosion Engineers I
- National Association of Corrosion Engineers II
- Powder Coating Application
- Fitting
- Grinding/Painting

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
DELEGATION ORDER

Training Proposal for:
KRT Marketing, Inc.

Small Business
ET19-0136

Approval Date: June 27, 2018

ETP Regional Office: San Francisco Bay Area  Analyst: C. Hoover

CONTRACTOR

• Type of Industry:
  Services
  Technology/Other
  Priority Industry: ☑ Yes ☐ No

• Number of Full-Time Employees
  California: 32
  Worldwide: 37
  Number to be trained: 32
  Owner ☑ Yes ☐ No

• Out-of-State Competition:

• Special Employment Training (SET):
  ☐ Yes ☑ No

• High Unemployment Area (HUA):
  ☐ Yes ☑ No

• Turnover Rate:
  1%

• Repeat Contractor:
  ☑ Yes ☐ No

FUNDING

• Requested Amount: $49,920
• 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>Retrainee SB &lt;100 Priority Rate</td>
<td>Business Skills, Computer Skills, Mgmng. Skills</td>
<td>32</td>
<td>8-60</td>
<td>0</td>
<td>$1,560</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: $26 SB Priority
- County(ies): Contra Costa
- Occupations to be Trained: Administration Staff, Account Executive, Web/Graphic Designer, Digital Strategist, Manager, Owner
- Union Representation: ☑ Yes
- ☑ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Propel Consulting Group in El Dorado Hills assisted with development for a flat fee of $3,500.
- Administrative Services: Propel Consulting Group will also provide administration services for a fee not to exceed 7.5% of payment earned.
- Training Vendors: N/A

OVERVIEW

Founded in 1972 and located in Lafayette, KRT Marketing Inc. (KRT) (www.krtmarketing.com) provides marketing and employee recruitment services for clients throughout the United States. KRT also provides a variety of advertising services for its business clients to market and brand services and products via email blasts, job postings (LinkedIn/Glassdoor), social media ads (Facebook/Twitter), web graphic design and tracking/analytics of ad campaigns. Customers include UnitedHealth Group, Gap Inc., Chipotle, TIAA and Jacobs Engineering Group. KRT has one facility in Lafayette, where the ETP-funded training will be delivered.

KRT faces an ever-changing technological environment where training topics like Google Analytics and Clickcast software needs to be delivered each year due to yearly changes and enhancements of new features including re-certification courses (Google Analytics Certification), so the Company can remain an official Google Analytics Preferred Partner. In addition, it takes trainees around 100 hours to fully be trained on KRT's media buying and optimization service.
for its clients’ ad campaigns - Clickcast software with upgrades occurring every three months resulting in new training sessions and processes to be delivered.

This is KRT’s second ETP project, and the second in the last five years. Under the prior Agreement, KRT implemented an in-house training program, Center of Excellence. This program has created an internal “Green Belt” certification where its employees were certified by KRT after completing training on its services, data analysis, sales and public speaking. In this proposal, KRT will expand the Green Belt certification to include new leadership and software training, such as TapClicks software, a reporting tool for tracking/analytics.

Some of the training curriculum is the same as in the prior Agreement. However, trainees who participated in the prior training plan will not receive duplicative training.

**Training Plan**

Training will be delivered via Class/Lab and E-Learning in the following:

**Business Skills:** Training will be offered to all occupations. Training will include product knowledge, customer needs, talent-acquisition analysis and workforce analytics. This training will allow staff to identify the challenges the client faces in attracting talent.

**Computer Skills:** Training will be offered to all occupations in software tools including Clickcast, Google Analytics, and advanced Microsoft Excel required to provide client services.

**Management Skills:** Training will be offered to Account Executives, Managers and the Owner in leadership, coaching, problem solving, decision making and team building. Being the primary owners of the client relationship and leaders of teams which supports each client, these trainees must understand what it takes to lead a team in servicing KRT clients, understand how to help grow staff’s skills and identify and solve problems at the client and employee levels.

**Training Infrastructure**

The VP, Business Operations, Controller and Managing Partner will oversee the project including scheduling and organizing all training. The Company’s third-party administrator, Propel Consulting Group, will upload training data into the ETP online system. The Controller will be the project’s dedicated administrator to support the project on the employee-data side. Training will be delivered by in-house experts.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes performance by KRT 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>ET17-0311</td>
<td>Lafayette</td>
<td>12/15/16 – 12/14/17</td>
<td>$38,584</td>
<td>$36,400</td>
<td>(94%)</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab/E-Learning Hours
8-60

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Public Speaking
- Leadership
- Business Performance
- Sales Skills
- Presentation Skills
- Project Management
- Communication Skills
- Client Services
- Product Knowledge
- Data Analysis
- Recruitment Advertising
- Talent-Acquisition Strategies
- Workforce Analytics
- Business Writing

**COMPUTER SKILLS**
- Hubspot (software)
- TapClicks (software)
- Intermediate and Advanced MS Office
- Google Analytics
- Google Analytics Certification
- Leveraging LinkedIn
- Clickcast (software)
- QuickBooks (software)
- Advanced Adobe

**MANAGEMENT SKILLS** (Managers/Owners Only)
- Leadership
- Problem Solving & Decision Making
- Team Building
- Coaching

**Note:** Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
Delegation Order

Retraine - Job Creation
Training Proposal for:
Lightning Bolt Solutions, Inc.

Small Business

ET19-0155

Approval Date: July 11, 2018

ETP Regional Office: San Francisco Bay Area
Analyst: A. Townsend

Contractor

- Type of Industry: Services
  Technology/IT

- Priority Industry: Yes No

- Number of Full-Time Employees
  California: 35
  Worldwide: 36
  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: $37,440
- In-Kind Contribution: $166,176
TRAINEE 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 Computer Skills SB &lt;100</td>
<td>Computer Skills</td>
<td>12</td>
<td>8-60 0</td>
<td>$1,560</td>
<td>$18.22</td>
</tr>
<tr>
<td></td>
<td>Priority Rate</td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraine SB &lt;100 Job Creation</td>
<td>Computer Skills</td>
<td>12</td>
<td>8-60 0</td>
<td>$1,560</td>
<td>$15.18</td>
</tr>
<tr>
<td></td>
<td>Initiative Priority Rate</td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #’s 1 & 2: $26 SB Priority
- County(ies): San Mateo County
- Occupations to be Trained: Application Consultant
- Union Representation: Yes
- No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Andersen Tax Consulting, San Francisco, assisted with development for a flat fee of $5,000.
- Administrative Services: Andersen Tax Consulting will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: In-house experts

OVERVIEW

Founded in 2002 and headquartered in South San Francisco, Lightning Bolt Solutions, Inc. (Lightning Bolt) is a software company that specializes in optimized physician scheduling system. The Company serves physicians, hospitals and healthcare organizations and uses Artificial Intelligence (AI) optimized technology to improve the scheduling process for physicians.

The Company’s AI technology focuses on smart scheduling. The system imitates human reasoning, considers every possible outcome across clients’ average scheduling rules, and instantly adjusts the schedule to accommodate physicians’ shift changes and time-off requests. The system will eliminate inefficient physician scheduling resulting in physician exhaustion and fatigue that potentially puts patients at risk and impacts emergency situations. Lightning Bolt's AI technology will streamline the smart scheduling software, resolve problems and shift to a...
more balanced and flexible schedule. The system will also improve patient access with its rule-based scheduling engine that anticipates demand and instantly adjusts a schedule to accommodate shift changes. On-call schedules will become instantly available, as well.

As the Company grows, hiring new Application Consultants (AC) within the year is part of its goals. The AC’s role is to provide overall technical support and customer service to clients. Continuous development of its AI technology prompted the Company to add more AC’s and train them to address customer service issues; provide application, technical support and troubleshooting; and resolve customer concerns regarding use of the system. The AC’s will need to know how to identify, document and report issues, problems or “bugs” within the software to the research and development team.

Job Creation

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

The Company anticipates 200% increase in sales revenue for 2018 and 2019, and due to increasing customer demands and workload, Lightning Bolt has committed to hiring 12 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

This is Lightning Bolt’s first ETP project. The Company proposes training in Computer Skills delivered as Class/Lab.

**Computer Skills:** This training will be offered to AC’s on Products, Processes, Rules (Preference, Numerical and Conditional), Advanced and Specialty Rules, Mobile Applications and Zendesk Support. The trainees will gain knowledge and understand the key elements of the Company’s system application. The AC’s will learn technical aspects of the software and how to read and interpret the reports in Access Optimization which is used to ensure that the supply of providers meet the demands of patients without exceeding the demand.

The AC’s will learn to properly use, write, and input rule based variables in the software. Trainees will be able to address differences in the design of the application depending on the physician's specialty and be able to enter the orders of instructions into the software and tell the program how to behave. The trainees will be able to provide technical support when the system is used on an Apple or Android device. The AC’s will be equipped to handle and deliver exceptional customer support and troubleshooting skills to meet the unique and highly specialized demands of physicians, hospitals and healthcare systems.

- Training Infrastructure

Lightning Bolt is ready to start training upon approval of this project. The HR Director will oversee training and has retained Andersen Tax Consulting to assist in project administration. All training topics will be delivered by in-house experts at the South San Francisco facility.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Trainees may receive any of the following:

### Class/Lab Hours
8-60

#### COMPUTER SKILLS

- **Process and Procedures, Product Knowledge, & Rules Training**
  - Setup Functions
  - Schedule Generator, Editing, Mapping
  - Viewer, NSight, View Designer
  - Requests and Reports
  - User Access Roles, Accounts and Permissions, Calendar Subscriptions
  - Preference Rules and Numeric Rules
  - Conditional Rules
  - Equalization and Proportion
  - MIP Rules and Pattern Frequency

- **Advanced Rules Training**
  - Access Optimization
  - Vacation Rounds Manager
  - Scheduling Layers and Tally Targets
  - Shifts, Denial Reasons, Requests, Decision Notes, and Locations
  - Locator Training
  - Parameters and Schedule Logs
  - SQL – Database Management
  - Analytics and SMS Job Manager
  - Database operations
  - Adding Licenses

- **Zendesk Software – Support Process Training**
  - Enterprise Clients

- **Specialty Rules Training for New Client Implementation**
  - Surgery Scheduling
  - Radiology Scheduling
  - Primary Care Scheduling
  - Pediatrics Scheduling
  - OB/GYN Scheduling
  - Nephrology Scheduling
  - Hospitalists Scheduling
  - Emergency Medicine Scheduling
  - Cardiology Scheduling
  - Anesthesia Scheduling

- **Mobile Applications Training**
  - Sandbox/MyClient (Tools/Edit/Parameters)
  - Shadow Support

---

**Note:** Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
TRAINING PROPOSAL FOR
NFCC, Inc. dba North Fresno Collision Center
17-0906

Panel Meeting Date: 06/22/2018
Delegation Order Date: 06/05/2018
Regional Office: Sacramento Regional Office
Analyst Name: Karen Jones
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: SET

FUNDING OVERVIEW

Provided here is a summary of the funding for the proposed Training Project.

<table>
<thead>
<tr>
<th>Program &amp; Admin Cost</th>
<th>Support Cost ($)</th>
<th>Substantial Contribution ($)</th>
<th>Total In-Kind</th>
</tr>
</thead>
<tbody>
<tr>
<td>$38,064.00</td>
<td>N/A</td>
<td>$0.00</td>
<td>$68,500.00</td>
</tr>
</tbody>
</table>

APPLICANT PROFILE

<table>
<thead>
<tr>
<th>Company Summary</th>
<th>NFCC, Inc. dba North Fresno Collision Center (NFCC) is a full service automotive repair center that specializes in mechanical and collision repair services.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s)</td>
<td>Services (Other)</td>
</tr>
<tr>
<td>Priority Industry</td>
<td>No</td>
</tr>
<tr>
<td>No. Employees (Applicant)</td>
<td>State: 50</td>
</tr>
<tr>
<td>Turnover Rate (Applicant)</td>
<td>7.00 %</td>
</tr>
<tr>
<td>Repeat Contractor</td>
<td>Yes</td>
</tr>
<tr>
<td>High Unemployment Area</td>
<td>Yes</td>
</tr>
</tbody>
</table>
TRAINING PROFILE

| Training Objective(s) | Training will focus on new equipment and Smart Systems such as lane-keeping, anti-roll, pacing and Active Park assist systems. Training will ensure staff can meet changing needs of clients. |

Training is summarized below, with additional details in Attachment 1 - Group and Job Title Details of this Panel Proposal.

<table>
<thead>
<tr>
<th>#</th>
<th>Group Characteristics</th>
<th># Of Trainees</th>
<th>Reimbursement Rate</th>
<th>Weighted Avg. Hours</th>
<th>Cost Per Trainee</th>
<th>Min-Max Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainees</td>
<td>37</td>
<td>$26.00</td>
<td>27</td>
<td>$702</td>
<td>8 - 60</td>
</tr>
<tr>
<td>2</td>
<td>Job Creation – Retrainees</td>
<td>15</td>
<td>$26.00</td>
<td>31</td>
<td>$806</td>
<td>8 - 60</td>
</tr>
</tbody>
</table>
PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2004 and headquartered in Fresno, NFCC provides automotive repair and towing services to individual clients, automobile insurers, and rental car fleets throughout the Fresno area. NFCC has partnerships with State Farm, AAA, USAA, Allied Nationwide, Progressive and Farmers Insurance. The Company specializes in the repair of BMW, Mercedes Benz, Land Rover, Jaguar, Tesla, Bentley, Toyota, and Honda vehicles. NFCC also sells automotive parts and accessories. Training will take place at the Company's two locations in Fresno.

2. Current Training Project Details

| Purpose of Training | This will be NFCC's second ETP Agreement and the second in the last five years. Under the previous Contract, NFCC focused training on new welding techniques and materials used in the automobile industry. The industry was moving towards an increase in the use of aluminum, boron, and ultra-high strength steels. This change required training to ensure NFCC could repair and maintain automobiles utilizing these materials. Training under this contract will focus on Smart Systems such as lane-keeping, anti-roll, pacing and active park assist systems. These new features require training on servicing and repairing. Courses including Active Lane-Keeping Systems and Steering, Suspension and Mechanical Systems will provide staff with skills and equipment knowledge needed. Training will also focus on new equipment recently purchased by NFCC. Both locations were outfitted with Car-O-Liner bench/rack’s and CarTronic Electronic 3-Dimensional measuring systems. Courses including 3D Measuring Set-Up/Analysis, Structural Corrections with 3D Measuring, and Car-O-Liner Measuring Software will ensure trainees can use this equipment effectively and efficiently. |
| Training Infrastructure and Administrative Plan | NFCC spends in excess of $60,000 per year on training. The Company provides new hire orientation, safety training, California labor laws and regulations, basic computer skills, violence in the workplace prevention, and sexual harassment prevention. ETP funds will not displace the Company’s existing financial commitment to training. Basic safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. Training Infrastructure NFCC's Human Resources Manager will oversee the training program. Each training site has an Office Manager responsible for |

Training Proposal for NFCC, Inc.
Reference Number: 17-0906  Page 3 of 5
roster collection, training coordination and project performance. These Managers will report training progress to the Human Resources Manager on a monthly basis. The Company has also hired a third party administrative Subcontractor, to assist with all ETP administrative requirements.

<table>
<thead>
<tr>
<th>Marketing Plan (MEC Only)</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Cost Description (MEC Only)</td>
<td>N/A</td>
</tr>
<tr>
<td>Substantial Contribution Description</td>
<td>N/A</td>
</tr>
</tbody>
</table>

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2* - *Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

<table>
<thead>
<tr>
<th>Delivery Method/Level</th>
<th>Classroom/Simulated Laboratory</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary</strong></td>
<td></td>
</tr>
<tr>
<td>All Occupations identified in Attachment 1 will receive training applicable to their jobs in Business Skills, Commercial Skills, Computer Skills, Management Skills and Continuous Improvement topics listed in Attachment 2.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method/Level</th>
<th>Productive Laboratory</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary</strong></td>
<td></td>
</tr>
<tr>
<td>Technicians and Production Staff (Attachment 1) will receive training in Commercial Skills topics listed under Attachment 2.</td>
<td></td>
</tr>
</tbody>
</table>

4. Additional Company or Training Project Details

Retrainee - Job Creation

NFCC recently expanded its operations with the purchase of a second location in Fresno. The new facility is 25,000-square-feet. The new facility requires NFCC to hire and train staff to ensure efficient operations. NFCC has committed to hiring 10 new employees (Project Estimators, Technicians and Administrative Staff) identified in Group Number 2. 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.
PROPOSED TRAINING PROJECT DETAILS

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor(s).

<table>
<thead>
<tr>
<th>Subcontractor Type</th>
<th>Subcontractor Name</th>
<th>City</th>
<th>Service Cost or Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development</td>
<td>Synergy Management Consultants, LLC</td>
<td>Grass Valley</td>
<td>$3,045.00</td>
</tr>
<tr>
<td>Administrative</td>
<td>Synergy Management Consultants, LLC</td>
<td>Grass Valley</td>
<td>Not to exceed 13.00% of payment earned</td>
</tr>
<tr>
<td>Training</td>
<td>None selected to date</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

4.3 Previous ETP Project Summary

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

<table>
<thead>
<tr>
<th>Previous Contract Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agreement Number</td>
</tr>
<tr>
<td>---------------------</td>
</tr>
<tr>
<td>ET15-0391</td>
</tr>
</tbody>
</table>

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.
Attachment 2 - Training Delivery and Curriculum Listing
Provided below are details on the types of training planned for this proposed Training Project.

<table>
<thead>
<tr>
<th>Delivery Method /Level</th>
<th>Classroom/Simulated Laboratory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training Type (Level)</td>
<td>Planned Course Offerings</td>
</tr>
<tr>
<td>Business Skills</td>
<td>Conflicts Resolution</td>
</tr>
<tr>
<td></td>
<td>Customer Care Skills</td>
</tr>
<tr>
<td></td>
<td>Customer Engagement</td>
</tr>
<tr>
<td></td>
<td>Direct Repair Partner Management</td>
</tr>
<tr>
<td></td>
<td>Educating the Consumer</td>
</tr>
<tr>
<td></td>
<td>Overcoming Objections</td>
</tr>
<tr>
<td></td>
<td>Presentation Skills</td>
</tr>
<tr>
<td></td>
<td>Sales Procedures and Strategies</td>
</tr>
<tr>
<td></td>
<td>Understanding Financial and Operating Metrics</td>
</tr>
<tr>
<td>Commercial Skills (Standard)</td>
<td>3 Stage Refinishing Process</td>
</tr>
<tr>
<td></td>
<td>3D Measuring Systems</td>
</tr>
<tr>
<td></td>
<td>AC Systems</td>
</tr>
<tr>
<td></td>
<td>Active Lane-Keeping Systems</td>
</tr>
<tr>
<td></td>
<td>Active Park Assist</td>
</tr>
<tr>
<td></td>
<td>Adhesive Bonding</td>
</tr>
<tr>
<td></td>
<td>Advanced Materials and Composite Repair</td>
</tr>
<tr>
<td></td>
<td>Aluminum Bonding and Structural Repair</td>
</tr>
<tr>
<td></td>
<td>Aluminum Tools and Minor Repair</td>
</tr>
<tr>
<td></td>
<td>Anti- Roll/Pacing Technology</td>
</tr>
<tr>
<td></td>
<td>Collision Repair Skills</td>
</tr>
<tr>
<td></td>
<td>Color Sand/Polish Surfaces</td>
</tr>
<tr>
<td></td>
<td>Color Theory and Matching Principles</td>
</tr>
<tr>
<td></td>
<td>Estimating Hybrid and Electrical Vehicles</td>
</tr>
<tr>
<td></td>
<td>Estimating Mechanical and Electrical Systems</td>
</tr>
<tr>
<td></td>
<td>Estimating Steering and Suspension Damage</td>
</tr>
<tr>
<td></td>
<td>Hybrid and Electric Vehicle Repair</td>
</tr>
<tr>
<td></td>
<td>Hybrid Vehicle Battery/Charging Systems</td>
</tr>
<tr>
<td></td>
<td>ICAR Collision Repair/ Refinish Skills</td>
</tr>
<tr>
<td></td>
<td>Pillars, Rockers, Floors and Rail Replacement</td>
</tr>
<tr>
<td></td>
<td>Plastic and Composite Repair</td>
</tr>
<tr>
<td></td>
<td>Product Knowledge</td>
</tr>
<tr>
<td></td>
<td>Refinishing Skills</td>
</tr>
<tr>
<td></td>
<td>Resistance Spot Welding</td>
</tr>
<tr>
<td></td>
<td>Spray-Gun Set-Up and Maintenance</td>
</tr>
<tr>
<td></td>
<td>Steering, Suspension and Mechanical Systems</td>
</tr>
<tr>
<td></td>
<td>Structural Repair/Body Alignment</td>
</tr>
<tr>
<td></td>
<td>Surface Preparation</td>
</tr>
<tr>
<td></td>
<td>Vehicle Priming and Sealing</td>
</tr>
<tr>
<td>Computer Skills (Standard)</td>
<td>Car-O-Liner Measuring Software</td>
</tr>
</tbody>
</table>
Attachment 2 - Training Delivery and Curriculum Listing

Provided below are details on the types of training planned for this proposed Training Project.

<table>
<thead>
<tr>
<th>Continuous Improvement Skills</th>
<th>CCC1 Software</th>
</tr>
</thead>
<tbody>
<tr>
<td>MITCH Custom Software</td>
<td>Mitchell Estimating Software</td>
</tr>
<tr>
<td>MS Office Intermediate/Advanced</td>
<td>Parts Trader- Parts Procurement Software</td>
</tr>
<tr>
<td>Quickbooks</td>
<td>Repair Scanning Software</td>
</tr>
<tr>
<td>Tesla Estimating/Parts Software</td>
<td>Volatile Organic Compound Tracking Software</td>
</tr>
<tr>
<td>Emergency Clean-Up Procedures</td>
<td>Handling Chemicals and Clean-Up Procedures</td>
</tr>
<tr>
<td>Just-In-Time Inventory Control/Protocol</td>
<td>Lean Process and Integration</td>
</tr>
<tr>
<td>Managing MSDS sheets</td>
<td>Problem Solving and Decision Making Skills</td>
</tr>
<tr>
<td>Process Implementation</td>
<td>Quality Assurance</td>
</tr>
<tr>
<td>Root Cause Analysis</td>
<td>Team Building</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Management Skills</th>
<th>Coaching Skills for Supervisors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Collaborative Leadership</td>
</tr>
<tr>
<td></td>
<td>Creating Business Strategy</td>
</tr>
<tr>
<td></td>
<td>Employee Engagement</td>
</tr>
<tr>
<td></td>
<td>Understanding Finance and Operational Metrics</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivery Method /Level</th>
<th>Productive Laboratory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training Type (Level)</td>
<td>Planned Course Offerings</td>
</tr>
<tr>
<td>Commercial Skills</td>
<td>3 Stage Color Match</td>
</tr>
<tr>
<td>3D Measuring Set-Up/Analysis</td>
<td></td>
</tr>
<tr>
<td>Aluminum Bonding</td>
<td></td>
</tr>
<tr>
<td>Aluminum Repair</td>
<td></td>
</tr>
<tr>
<td>Aluminum Welding</td>
<td></td>
</tr>
<tr>
<td>Body Filler Methods</td>
<td></td>
</tr>
<tr>
<td>Brazing</td>
<td></td>
</tr>
<tr>
<td>Color Blending</td>
<td></td>
</tr>
<tr>
<td>Color Tinting</td>
<td></td>
</tr>
<tr>
<td>Estimating Advanced</td>
<td></td>
</tr>
<tr>
<td>Vehicle Systems</td>
<td></td>
</tr>
<tr>
<td>Estimating Advanced</td>
<td></td>
</tr>
<tr>
<td>Materials Composite Structure</td>
<td></td>
</tr>
<tr>
<td>Estimating Diagnosis</td>
<td></td>
</tr>
<tr>
<td>Rivet Bonding</td>
<td></td>
</tr>
<tr>
<td>Scanning Analysis</td>
<td></td>
</tr>
<tr>
<td>Structural Corrections with 3D Measuring</td>
<td></td>
</tr>
<tr>
<td>Structural Welding</td>
<td></td>
</tr>
</tbody>
</table>
Provided below are details on the types of training planned for this proposed Training Project.

<table>
<thead>
<tr>
<th><strong>PL Justification and Details</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Explain the need for productive laboratory (PL) training</strong></td>
</tr>
<tr>
<td>Productive Lab is needed as Technicians and Estimators coming into the industry lack hands on training. Even those who attended vocational schools such as Wyotech or UTI lack substantial hands on training and skills necessary to perform job functions. These employees must be trained in a 1:1 environment with journey level technician. PL training will use master trained or subject-matter experts to train new technicians.</td>
</tr>
</tbody>
</table>

| **Describe the Equipment/Processes to be used in delivering the PL training** |
| Equipment to be used will be resistance spot welders, mig (metal inert gas) welders, frame rack and measuring system, spray guns, spray booths, various hand tools, All-data IT, estimatics and ADP system for estimators including Mitchell, CCC and ADP estimating systems and CCCOne Software. Training assignments will include Collision Repair and painting, body plastic repair, welding of structural parts, measuring frames and unibody structures, and aluminum repair. |

| **Describe Trainer Qualifications** |
| Trainers will be journey-level technicians. Technician trainers may be ICAR, ASE or master trained employees or outside consultants. Trainers will provide feedback on best practices and better ways of performing tasks, help the employee with re-work if necessary, ensure tasks were performed correctly with understanding of processes and tactical methods. |

| **Trainer to Trainee Ratios** - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio |
|----------------------------------|-----------------|
| **Ratio for One Class, or Minimum When More than One Class** |
| 1 | 1 |
| **Ratio for Maximum Ratio When More than One Class** |
| 1 | 1 |
| **PLT Approval** |
| Yes |
TRAINING PROPOSAL FOR
Scorpio Enterprises dba Airemasters Air Conditioning, Inc.
18-0627

Approval Date: 07/12/2018
Regional Office: North Hollywood Regional Office
Analyst Name: Marisol Niquet
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out of State Competition

FUNDING OVERVIEW
Provided here is a summary of the funding for the proposed Training Project.

<table>
<thead>
<tr>
<th></th>
<th>TOTAL ETP FUNDING: $42,250.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program &amp; Admin Cost</td>
<td>$42,250.00</td>
</tr>
<tr>
<td>Support Cost ($$)</td>
<td>N/A</td>
</tr>
<tr>
<td>Substantial Contribution ($)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Total In-Kind</td>
<td>$103,000.00</td>
</tr>
</tbody>
</table>

APPLICANT PROFILE

| Company Summary | Scorpio Enterprises dba Airemasters Air Conditioning, Inc. (Airemasters), is a full service commercial heating, ventilating and air conditioning contractor. |

<table>
<thead>
<tr>
<th>Industry Sector(s)</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Industry</td>
<td>Yes</td>
</tr>
<tr>
<td>No. Employees (Applicant)</td>
<td>State: 90</td>
</tr>
<tr>
<td>Turnover Rate (Applicant)</td>
<td>10.00 %</td>
</tr>
<tr>
<td>Repeat Contractor</td>
<td>No</td>
</tr>
<tr>
<td>High Unemployment Area</td>
<td>Yes</td>
</tr>
<tr>
<td>Union(s)</td>
<td>Sheet Metal Workers / Local 105</td>
</tr>
</tbody>
</table>
Training Objective(s) | Training will improve overall job skills and allow staff to efficiently identify and respond to industry trends.

Training is summarized below, with additional details in Attachment 1 - Group and Job Title Details of this Panel Proposal.

<table>
<thead>
<tr>
<th>#</th>
<th>Group Characteristics</th>
<th># Of Trainees</th>
<th>Reimbursement Rate</th>
<th>Weighted Avg. Hours</th>
<th>Cost Per Trainee</th>
<th>Min-Max Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>47</td>
<td>$26.00</td>
<td>25</td>
<td>$650</td>
<td>8 - 60</td>
</tr>
<tr>
<td>2</td>
<td>Job Creation – Retraine Initiative Program, Retraine</td>
<td>15</td>
<td>$26.00</td>
<td>30</td>
<td>$780</td>
<td>8 - 60</td>
</tr>
</tbody>
</table>
Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1974 and headquartered in Santa Fe Springs, Airemasters manufactures, designs, builds, installs and maintains HVAC systems, plumbing, piping, direct digital control systems and provides mechanical services. Airemasters’ key customers include commercial business and building owners including high-rise buildings, retail and shopping centers, restaurants, and clean environments including computer labs and scientific facilities.

2. Current Training Project Details

Provided here are details on the purpose of the training, a summary of the marketing plan and support costs.

### Purpose of Training

Over the past several years, businesses are requiring that HVAC systems be much more energy efficient. More energy efficient equipment and complex control systems reduces power usage and are in high demand. As the industry continues to change, new contracts require a diverse range of skills and broad knowledge of new energy efficient equipment and complex control systems. Staff must possess the knowledge and skills to install, maintain, reconfigure, move, and refurbish complex systems.

Electrical, mechanical, and construction skills are constantly being developed and revised as new materials and technology modify and improve the Company’s existing product lines. In addition, staff must stay current with building standards and codes, regulations, clearances and remain current on design trends.

With the changes to the industry and a recently expanded client base, Airemasters must provide employees with extensive training on new energy efficient equipment, control systems, new regulations, and a vast number of other skills to meet customer demand.

Business Skills will be offered to all occupations. Training in Project Management will allow staff to provide better customer service to clients.

Commercial Skills will be offered to Foreman, Journeymen, Laborer, Project Managers, Service Technicians, Superintendent and Controller. Training is geared to advance knowledge in ever changing HVAC equipment, Controls and technology.

Computer Skills will be offered to all occupations. Topics include Microsoft Office, Quickpin and Blue Beam. Training will help staff to
manage construction jobs and successfully complete jobs and manage projects efficiently and effectively.

Training will be delivered at the Company's Santa Fe Springs location by in-house subject matter experts and vendors in specialized topics as needed.

**Training Infrastructure and Administrative Plan**

Airemasters spends an estimated $10,000 annually in training at their California facility. 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.

The Vice President of Operations will be the internal lead who will coordinate and instruct internal staff 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.

**Marketing Plan (MEC Only)**

N/A

**Support Cost Description (MEC Only)**

N/A

**Substantial Contribution Description**

N/A

### 3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

<table>
<thead>
<tr>
<th>Delivery Method/Level</th>
<th>Classroom/Simulated Laboratory</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary</strong></td>
<td></td>
</tr>
</tbody>
</table>

All occupations will receive training in Business Skills and Computer Skills (Attachment 2).

Foreman, Journeymen, Laborer, Project Managers, Service Technicians, Superintendent and Controller will receive training in Commercial Skills (Attachment 2).

<table>
<thead>
<tr>
<th>Delivery Method/Level</th>
<th>Productive Laboratory</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Summary</strong></td>
<td></td>
</tr>
</tbody>
</table>

Service Technicians will receive training in Productive Laboratory (Attachment 2).
PROPOSED TRAINING PROJECT DETAILS

4. Additional Company or Training Project Details

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.

Retrainee - Job Creation

Over the past few years, Airemasters has secured several new service and maintenance contracts throughout California. At the same time, the industry has changed dramatically. Businesses, including our new contracts, require HVAC systems be much more energy efficient. This new technology in energy efficiency and expansion of the Company’s total workload creates a need for hiring more staff. This requires hiring approximately 5 net new-hire office staff to handle the increased administrative duties created by new contracts, and approximately 10 new hire technicians (Group 2) as the equipment standards have changed and requires technical expertise to meet energy efficiency standards and an increased workload created by the new contracts.

4.1 Program Waivers

No Waivers have been applied to this proposed project.

4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor(s).

<table>
<thead>
<tr>
<th>Subcontractor Type</th>
<th>Subcontractor Name</th>
<th>City</th>
<th>Service Cost or Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development</td>
<td>Welsh Advisors, Inc.</td>
<td>Anaheim</td>
<td>$11,700.00</td>
</tr>
<tr>
<td>Administrative</td>
<td>Welsh Advisors, Inc.</td>
<td>Anaheim</td>
<td>13% of funds earned</td>
</tr>
<tr>
<td>Training</td>
<td>None selected to date</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.
## Attachment 2 - Training Delivery and Curriculum Listing

Provided below are details on the types of training planned for this proposed Training Project.

<table>
<thead>
<tr>
<th>Delivery Method /Level</th>
<th>Classroom/Simulated Laboratory</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Training Type (Level)</strong></td>
<td><strong>Planned Course Offerings</strong></td>
</tr>
<tr>
<td>Business Skills</td>
<td>Project Management</td>
</tr>
<tr>
<td>Commercial Skills (Standard)</td>
<td>Equipment Operation</td>
</tr>
<tr>
<td></td>
<td>Foremen Skills Training</td>
</tr>
<tr>
<td></td>
<td>Forklift training</td>
</tr>
<tr>
<td></td>
<td>HVAC Equipment &amp; Controls Simulated Lab</td>
</tr>
<tr>
<td></td>
<td>Job Invoicing Dummy Data - Simulated Lab</td>
</tr>
<tr>
<td></td>
<td>Journeyman Skills Training</td>
</tr>
<tr>
<td></td>
<td>OSHA 10</td>
</tr>
<tr>
<td></td>
<td>OSHA 30</td>
</tr>
<tr>
<td></td>
<td>Technician Controls Training</td>
</tr>
<tr>
<td>Computer Skills (Standard)</td>
<td>Bluebeam Software</td>
</tr>
<tr>
<td></td>
<td>Microsoft Office Intermediate and Adv.</td>
</tr>
<tr>
<td></td>
<td>Prolog software</td>
</tr>
<tr>
<td></td>
<td>Quickpin Software (estimator program)</td>
</tr>
<tr>
<td></td>
<td>Reiken Software (Daily Reporting Program)</td>
</tr>
<tr>
<td></td>
<td>Shertrack Software (scheduling software)</td>
</tr>
</tbody>
</table>

**Delivery Method /Level**

<table>
<thead>
<tr>
<th><strong>Training Type (Level)</strong></th>
<th><strong>Productive Laboratory</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial Skills</td>
<td>Controls Training</td>
</tr>
<tr>
<td></td>
<td>HVAC Economizer Installations &amp; Troubleshooting</td>
</tr>
</tbody>
</table>

**PL Justification and Details**

**Explain the need for productive laboratory (PL) training**

In this dynamic HVAC manufacturing and service environment in addition to simulated lab, retrainees need experience with real job scenarios by working with veteran expert employees to train them during job tasks to ensure satisfactory completion of tasks. Service Technicians and new hire Service Technicians will be receiving the productive lab training.

Training will be more guided and hands on than actual work assignments and may only be a part of the overall job.

**Describe the Equipment/Processes to be used in delivering the PL training**

Computer equipment, HVAC equipment, Maintenance Tools and equipment, welding Equipment and controls will be used to manufacture, install and maintain building mechanical and environmental systems.

**Describe Trainer Qualifications**

The trainer will be an expert in these topics through both experience and previous training.

**Trainer to Trainee Ratios** - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio

<table>
<thead>
<tr>
<th><strong>Ratio for One Class, or Minimum When More than One Class</strong></th>
<th><strong>Trainer</strong></th>
<th><strong>Trainee</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ratio for One Class, or Minimum When More than One Class</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Ratio for Maximum Ratio When More than One Class</td>
<td>1</td>
<td>3</td>
</tr>
</tbody>
</table>

**PLT Approval**

Yes
March 23, 2018

Employment Training Panel
1100 J Street, 4th Floor, Suite 400
Sacramento, CA 95814

Re: Union Support Letter for AireMasters Air Conditioning

Dear Sir/Madam:

Sheet Metal, Air, Rail, Transportation Workers Local Union 105 (SMART Local 105) supports the AireMasters Air Conditioning Employment Training Panel Agreement. We are aware that employees of AireMasters Air Conditioning will receive training funded through the Employment Training Panel and we concur with the proposed training. At the present, AireMasters Air Conditioning employs twenty-seven (27) SMART Local 105 sheet metal workers. If you have any questions or need any further assistance, please feel free to contact Ms. Lori Turner, my secretary, at (909) 305-2800 ext. 231.

Sincerely,

Luther B. Medina
Business Manager/President

cc: Mr. Michael Dean, Vice President of Operations, AireMasters Air Conditioning
Ms. Stephanie R. Haney, AireMasters Air Conditioning
DELEGATION ORDER

Retraine - Job Creation
Training Proposal for:
Social Imprints, LLC

Small Business
ET19-0137

Approval Date: June 29, 2018

ETP Regional Office: San Francisco Bay Area  Analyst: S. Wang

CONTRACTOR

- Type of Industry: Manufacturing

- Number of Full-Time Employees
  California: 33
  Worldwide: 33
  Number to be trained: 39

- 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: $48,984
- In-Kind Contribution: $67,800
## 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>SET Priority Rate SB &lt;100 Multiple Barriers</td>
<td>Business Skills, Comm’l. Skills, Computer Skills, Cont. Imp., Mfg. Skills</td>
<td>33</td>
<td>8-60 0</td>
<td>$1,248</td>
<td>*$14.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 48</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>SET Priority Rate Multiple Barriers Job Creation</td>
<td>Business Skills, Comm’l. Skills, Computer Skills, Cont. Imp., Mfg. Skills</td>
<td>6</td>
<td>8-60 0</td>
<td>$1,300</td>
<td>*$14.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 50</td>
<td></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.

- **Reimbursement Rate:**
  - Job #’s 1 & 2: $26 SB Priority
- **County(ies):**
  - San Francisco, Sacramento
- **Occupations to be Trained:**
  - Admin/Support, Owners, Production Staff, Supervisors/Managers, Technical Staff
- **Union Representation:**
  - Yes
  - No
- **Health Benefits:**
  - N/A

## SUBCONTRACTORS

- **Development Services:**
  - Prospect Consulting Group, Inc. of San Francisco assisted with development for a flat fee of $2,000.
- **Administrative Services:**
  - Prospect Consulting Group, Inc. will also provide administrative services for a fee not to exceed 13% of payment earned.
- **Training Vendors:**
  - To Be Determined

## OVERVIEW

Founded and located in San Francisco in 2008, Social Imprints, LLC (Social Imprints) ([https://socialimprints.com/](https://socialimprints.com/)), provides screen-printing, embroidery, paper printing, product packaging, online account management services, and other fulfillment solutions for self-branded products (apparel, mugs, notebooks, etc.). All production and warehousing is conducted from its
San Francisco facility, and an order-taking department in Sacramento. Both facilities will participate under this Proposal.

Customers include City Year, Docusign, Dropbox, Lyft, and Team Fox for Parkinson’s Research.

**PROJECT DETAILS**

This will be Social Imprint’s third ETP-funded training, and the second within the last five years. Training in its previous Agreement focused on the Company’s goal of upward mobility and professionalism for its at-risk employee population. Curriculum in this new proposal will not be duplicated for any trainees.

Training will help the Company reach a larger customer base with extended global services including embroidery, Webstore Logistics and new screenprinting presses. Social Imprints anticipates training will result in an increase in international shipments with this training.

Additionally, in 2017, Social Imprints won the “Fast Company” and Mercedes Benz “Drive Your Business Forward” contest of a commercial van equipped with a mobile printing press. With this “Printmobile”, the company can participate in live events, trade shows, expos, corporate team building events, and festivals to help expand and promote their business.

Training will be delivered at its San Francisco facility and Sacramento-based employees will participate via E-Learning or attend its San Francisco sessions.

**Retraineer-Job Creation**

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

Due to the global business expansion to meet business capacity, the Company will hire six new staff (Job Number 2) to whom it will provide training in entry level embroidery, Webstore Logistics, such as order-taking, packaging, and order fulfillment, and new screenprinting presses. The new employees are need to help keep business up to speed and to meet customer demands.

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**

Training will be delivered via class/lab and E-learning in the following:

**Business Skills:** Training will be offered to all occupations in Performance, Sales and Accounting Management. Training will focus on a new performance management system, Key Performance Indicators. This system will teach staff how to use data to help increase organizational goals and efficiencies.

**Commercial Skills:** Training will be offered to Admin/Support and Production Staff on branding for customers’ product development. Training will include a newly implemented ecommerce retail Webstore Logistics for global sales to provide sustainable service with international clients and eliminate custom issues. Training will also include custom regulations, shipping restrictions, insurance requirements and proper documentations.
**Computer Skills:** Training will be offered to all occupations in various software including Thincloud Enterprise Resource Planning Upgrade for order processing and workflow; Hubspot for blogging, search engine optimization, marketing automation, web analytics to integrate into the Webstore; Salesforce manages contacts, leads, and opportunities; and Realtime Dispatch Orderflow a warehouse management software that enhances order processing related to the webstore.

**Manufacturing Skills:** Training will be offered to Production Staff on new equipment including Big Joe Lift and Workhorse Manual Press. Each piece of equipment has new features to allow staff to operate at a higher quantity and quality. The Workhorse Manual Press will be used for standard production and for demonstration purposes when hosting corporate events.

**Continuous Improvement:** Training will be provided to all occupations, but focus on Team Leads. Training will include leadership and development to obtain the skills necessary to encourage and support their team as the company expands.

**Training Infrastructure**

Social Imprints is ready to start training upon approval. The HR Manager will oversee training delivery and an internal administrative staff will be assigned to collect and maintain rosters.

Training will be provided at the Company's San Francisco facility by in-house experts and vendors as needed.

**Multiple Barriers**

Social Imprints is committed to hiring employees from at-risk populations. Its current workforce is approximately 70% at-risk populations. Staff includes formerly incarcerated individuals, recovering addicts, low-income individuals, and individuals with less than a high school education. The at-risk population are offered careers in management, sales, marketing and customer service in a supportive work environment that may lead to a promotion from within the company. Additionally, eligible employees are offered an incentive plan; a 15% profit sharing distribution at the end of the year.

**Wage Modification**

Trainees in Job Numbers 1 and 2 have two or more barriers to employment (e.g., mental or physical disability, limited English proficiency, limited math skills). These trainees may receive the ETP Minimum Wage post-retention.

**RECOMMENDATION**

Staff recommends approval of this proposal with the Wage Modification.

**PRIOR PROJECTS**

The following table summarizes performance by Social Imprints 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>ET17-0270</td>
<td>San Francisco</td>
<td>10/21/16 – 10/20/17</td>
<td>$44,928</td>
<td>$34,906 (78%)</td>
<td></td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab/E-Learning Hours
8-60

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Performance Management
- Sales and Account Management

**COMMERCIAL SKILLS**
- Branding
- Mobile Printing/Mobile Sales
- Product Kitting and Assembly
- Webstore Logistics

**COMPUTER SKILLS**
- New Technology for Growth
  - Adobe Creative Suite
  - Human Resources Information System
  - Hubspot
  - Funnel Source
  - New Accounting Software
  - Realtime Dispatch Orderflow
  - Thincloud ERP Upgrade
  - Warehouse Management System
  - Salesforce

**CONTINUOUS IMPROVEMENT**
- Leadership Training and Development
- New Product Development

**MANUFACTURING SKILLS**
- Pre-Production Skills
  - Film Separation
  - Screen Burning
  - Production Design Artist
- New Equipment Operations
  - Big Joe Lift
  - M&R Automatic Press
  - M&R I-Image ST
  - Workhorse Manual Press

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:

Summit Machine LLC

Agreement Number: ET19-0193

Approval Date: July 13, 2018

ETP Regional Office: North Hollywood

Analyst: J. Romero

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraineepriority Rate</th>
<th>Industry Sector(s):</th>
<th>Manufacturing Aerospace and Defense</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>☑ Yes ☐ No</td>
</tr>
</tbody>
</table>

| Counties Served:     | San Bernardino         | Repeat Contractor:  | ☑ Yes ☐ No                         |

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

| Number of Employees in: | CA: 185 | U.S.: 5,000 | Worldwide: 367,700 |

| Turnover Rate:        | 3%       |                     |                                    |

| Managers/Supervisors: | 13%      |                     |                                    |

| (% of total trainees) |                                    |                                    |                                    |

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earners Reduction)</th>
<th>= Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$49,400</td>
<td>$0</td>
<td>$0</td>
<td>$49,400</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $51,000
### 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 Priority Rate</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills, PL-Manufacturing Skills</td>
<td>75</td>
<td>8-200 0</td>
<td>$624</td>
<td>$16.70</td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Priority Rate Job Creation Initiative</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills, PL-Manufacturing Skills</td>
<td>5</td>
<td>8-200 0</td>
<td>$520</td>
<td>*$13.66</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: $16.70 per hour ETP Standard Wage for San Bernardino; and $13.66 per hour for San Bernardino County in Job Number 2 (Job Creation)

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

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

Up to $2.50 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</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Machinist</td>
<td>31</td>
<td></td>
</tr>
<tr>
<td>Production Worker</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Manager/Supervisor</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Sales Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Technical Support Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>75</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Machinist</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 2003, Summit Machine LLC (www.summitmachining.com), (Summit) is a wholly owned subsidiary of Precision Castparts Corp. (Precision) in Portland, Oregon. Training in this proposal will be participated by two of Precision’s subsidiaries: Summit which is headquartered in Ontario, and Alu-forge, Inc. dba American Handforge (Alu-forge) which operates in Rialto. Summit and Alu-forge will jointly conduct training under this ETP Agreement. However, Summit will be the main contract holder.

Summit specializes in the manufacture of complex components for aerospace, commercial defense, power generation, and space and petroleum industries. The Company has developed an expertise in machining nickel-based alloys as well as titanium, stainless steel, and aluminum. It also operates computer numerical controlled (CNC) lathes and CNC milling centers. Summit’s customers include Eaton, Pratt & Whiney, Lockheed Martin, GKN Aerospace, Barnes Aerospace, GE, Honeywell, Rolls-Royce, Bombardier, and Boeing.

Alu-forge, specializes in the production of quality aluminum, titanium and stainless steel open die forging in various shapes, thickness, widths and lengths. The Company produces hand-forged biller, block, ring or biscuit that range from 1 to 20,000 pounds in weight and are custom made for businesses in the aerospace, defense, industrial, electronic, semiconductor and nuclear industries.

Summit and Alu-forge’s business growth is driven by the market expansion of the businesses they serve, and has generated the need for additional company–wide training. Training will be provided at their respective locations in Ontario and Rialto. Summit and Alu-forge has reconfigured their production lines to expand production capability and improve performance in fulfilling customer needs while maintaining focus on providing quality products. The implementation of new procedures has driven the need to cross-train employees to run these new lines. The proposed training will upgrade employee skills in production and business operation to fulfill new business demands and requirements. This will be Summit’s second ETP Agreement, the second in the last five years.

Both Companies participating in this project are eligible for standard retraining as a manufacturer facing Out-of-State Competition for industrially-classified manufacturers retaining current employees.

PROJECT DETAILS

Training in the prior project focused on Lean Manufacturing, which constituted Phase 1 of its training plan. Due to operational and business demands, the Company only completed 50% of the initial training plan. In this ETP Agreement Summit plans to complete the training from the initial training plan, and also implement Phase 2 of the Lean Manufacturing program. In addition, employees must be trained on the redesigned processes applicable in the operation of Summit’s reconfigured production lines. The Company will also provide Manufacturing Skills, Business Skills, Computer Skills and Continuous Improvement training with additional new topics for new and existing employees. Training will increase productivity, reduce waste and enable the Company to produce quality products that meet customer specifications.
Commitment to Training

Summit spends approximately $65,000 annually on job-specific training. Training includes new-hire orientation, OSHA mandated training, sexual harassment prevention and first aid training. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Infrastructure

Summit is ready to start training upon approval of this proposal. Training will be conducted by qualified, in-house trainers. The Company has assigned its Human Resources Generalist and an assistant administrative coordinator to coordinate training and act as the point of contact with ETP. In addition, Summit has engaged the services of a third party administrator to assist with administration.

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.

Summit has committed to hiring five 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.

Summit’s plan to hire approximately five “net new jobs” under this Agreement is driven by an increase in product demand and services, which has grown steadily in recent years. In support of this demand, Summit has added additional production lines and a new shift in the production process. The Company is preparing to have well-trained and production ready employees to fill in new positions as they become available.

Temporary to Permanent Hiring

Summit intends to train 5 workers under Panel guidelines for the Temporary-to-Permanent program (Job Number 2). 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 three months. 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. Moreover, they cannot be enrolled as trainees until after they have been hired by Summit 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 in the following:

Business Skills: This training will be offered to all occupations. This training will cover Communication, Customer Service, Product Knowledge and Time Management Skills. Trainees will also learn effective ways to identify and resolve problems in a timely manner. Training will result in an improvement in overall customer satisfaction and increased sales.
**Computer Skills**: This training will be offered to all occupations to support business operations. Trainees will learn Inventory Control, CAD, Programming Equipment, and various software applications to control the design and manufacturing of new products. Cross-training on computer controlled equipment allows for a large pool of workers able to manufacture products. This gives the Company additional resources to meet customer needs and results in increased sales.

**Continuous Improvement**: This training will be offered to all occupations. The Company has determined that continuous training of its employees is vital to the success of the Company. In the previous project, Summit began creating teams to identify ways of improving business operations, increasing manufacturing productivity and reducing waste. Training will focus on Lean Manufacturing, Quality Control Resolving Production Problems and Team Problem Solving and Resolution. This training will lead to additional production capacity and reduce operating costs.

**Manufacturing Skills**: This training will be offered to Machinists, Production Workers, and Technical Support Staff. Training will focus on CNC Equipment Operation, Manufacturing Techniques, Standard Operating Procedures, Technical Tools and Processes, and Testing Equipment. This training will give the Company additional resources, enabling it to adapt to changing production runs. The training will allow for a workforce with greater technical skills and a more diverse knowledge of production techniques.

**PL- Manufacturing Skills**: Training will focus on CNC, Maintenance, Manufacturing, Technical Tools/Equipment, and Equipment Calibration. Cross-training will enable the Company to make improvements in production flow as needs change. Having more workers prepared to perform a variety of machine operations gives the Company the resources to meet customer needs. The training will also help improve operational efficiency by reducing equipment malfunctions.

**Productive Laboratory**

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

PL training will be provided to 10 Production Workers, Machinists and Technical Support Staff. Each trainee will receive up to 30 hours of PL training. PL training will be provided in the production area of Summit and Alu-forge at a 1:1 trainer-to-trainee ratio on existing and newly purchased equipment. Trainees who become proficient on one type of equipment will be cross-trained on other equipment.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes performance by Summit 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>ET16-0259</td>
<td>Ontario</td>
<td>11/17/15 – 11/16/17</td>
<td>$99,882</td>
<td>$49,356</td>
<td>(49%)</td>
</tr>
</tbody>
</table>

Poor performance on Summit’s first ETP agreement was due to a shift in focus and priority away from previously planned training during the Agreement term to satisfy the increase in production demands. There was a delay in training because the Company could not release workers from work functions to attend training. Additionally, there were changes in company management that
impacted the training plan. Business demand and production has since stabilized and a new management team is now in place and are fully committed to the ETP program. The Company is now positioned to take full advantage of the ETP-funded training.

**DEVELOPMENT SERVICES**

Summit retained National Training Company (NTC) in Irvine to assist with development of this proposal for a flat fee of $3,000.

**ADMINISTRATIVE SERVICES**

NTC 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:

CONTINUOUS IMPROVEMENT

- Best Work Practices
- Coaching Procedures
- Decision Making Skills
- Effective Communications
- Kaizen
- Leadership Skills
- Lean Manufacturing
- Operating Procedures
- Planning and Scheduling Techniques
- Quality Control
- Resolving Production Problems
- Standard Work Methods
- Team Problem Solving and Resolution

COMPUTER SKILLS

- Accounting Software
- Inventory Control
- Mitutoyo MCosmos Software
- MS Office (Intermediate and Advanced)
- PCdmis CAD++
- Procam Software
- Production/Distribution Software
- Programming Equipment
- Sales Forecasting
- Solid Works Software
- TransMagic Software
- VeriCut Software

MANUFACTURING SKILLS

- Assembly Procedures
- Blueprint Reading
- CNC Equipment Operation
- Emergency Response Team Training
- Equipment Calibration
- Equipment Maintenance and Repair Skills
- Forklift Certification
- Hazardous Waste
- Inspection Techniques
- Maintenance Equipment
- Manufacturing Techniques
- Preferred Work Methods
- Product Specifications
- Safety Procedures
- Standard Operating Procedures
- Supply Chain
- Technical Tools and Processes
- Testing Equipment
- Turret Installation

**BUSINESS SKILLS**

- Business Processes
- Communication Skills
- Conflict Management
- Cost Accounting/Job Costing
- Customer Service Skills
- Leadership Skills
- Negotiating Skills
- Product Knowledge
- Project Management
- Time Management Skills

**PL Hours**

0 – 30 Trainees may receive any of the following:

**MANUFACTURING SKILLS-PRODUCTIVE LAB (1:1 ratio)**

- Calibration Equipment
- CNC Equipment
- Maintenance Equipment
- Manufacturing Equipment
- Technical Tools/Equipment

**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:
Timberworks Construction Services, Inc.

Small Business
ET19-0141

Approval Date: June 27, 2018

ETP Regional Office: Sacramento

Analyst: D. Jordan

CONTRACTOR

• Type of Industry: Construction
• Number of Full-Time Employees
  California: 75
  Worldwide: 75
  Number to be trained: 69

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: $48,438
• In-Kind Contribution: $57,000
## 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>Business Skills, Commercial Skills, Computer Skills</td>
<td>66</td>
<td>8-60</td>
<td>Weighted Avg: 27</td>
<td>$702</td>
</tr>
<tr>
<td>1</td>
<td>Retrainee Business Skills, Commercial Skills, Computer Skills</td>
<td>Priority Rate SB &lt;100</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Business Skills, Commercial Skills, Computer Skills</td>
<td>Job Creation Initiative Priority Rate SB &lt;100</td>
<td>3</td>
<td>8-60</td>
<td>Weighted Avg: 27</td>
<td>$702</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): Sacramento
- Occupations to be Trained: Administrative Staff, Area Manager, Foremen, Plumbers, Shop Staff
- Union Representation: Yes
- Health Benefits: N/A

### SUBCONTRACTORS

- Development Services: Propel Consulting Group in El Dorado Hills assisted with development for a flat fee of $2,500.
- Administrative Services: Propel Consulting Group will also perform administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined.

### INTRODUCTION

Founded in 2015 and located in Sacramento, Timberworks Construction Services, Inc. (Timberworks) provides residential framing services on new construction homes including lumber framing services and waterline pre-fabrication. In addition to the framing of structures, the Company builds and installs walls as requested. Timberworks customers include Lennar Homes, William Lyon Homes, DR Horton and Meritage Homes. Training will take place at Timberworks only location in Sacramento. This is Timberworks first ETP Agreement.
Need For Training

Timberworks’ customers are requiring plumbing sub-contractors to prepare pipeline lay-outs and water/waste designs. Training in courses such as AutoCAD, SupplyPro, BuildPro, and, Sage 100 Contractors SQL will ensure trainees have necessary skills to prepare and read waterline plans. Trainees will also receive courses in plumbing and pipe installation, water heater installation, and building/plumbing code updates.

Timberworks is also committed to upgrading employees’ soft skills. Training in customer service, time management, and leadership will give trainees skills to promote the Company’s services.

Retrainee – Job Creation

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

The Sacramento region has experienced an increase in new construction housing in the last few years. Subsequently, Timberworks’ has grown 30% over the same period and expects continued growth. The Company will be expanding business capacity and has committed to hiring 3 trainees (Foremen and Plumbers to meet business needs. 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.

PROJECT DETAILS

Training Plan

Training will consist of classroom training focused on improving incumbent staff skills and providing skills to inexperienced staff. Class/Lab training will be provided by in-house subject matter experts and vendors in the following:

Business Skills: Training will be delivered to Administrative Staff and Area Managers. Training topics will include Customer Service, Marketing/Sales Techniques, Leadership and Project Management. Courses will allow employees to better negotiate deals and provide excellent customer service.

Commercial Skills: Training will be delivered to all Staff except Area Managers. Staff will receive training on Plumbing Installation, Plumbing Design, Water Heater Installation, Project Plan Design, Pipe Installation, and Building/Plumbing Codes. Training will ensure all installations meet customer and regulatory requirements.

Computer Skills: Training will be delivered to Administrative Staff and Area Managers. Courses include AutoCAD, SupplyPro, BuildPro, Intermediate and Advanced Microsoft Office, Sage 100 Contractors SQL, and Tablets. Training will provide staff with the skills to use software systems to track and report information and understand plans and financial reporting.

Commitment to Training

Timberworks allocates approximately $300,000 annually for training that includes new-hire orientation, staff development and safety 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 Infrastructure

Timberworks has a detailed training plan in place and is ready to begin training upon approval. The Company’s VP of Business Development and two administrative staff members will oversee this training project. In addition, the Company has retained the services of Propel Consulting Group to assist with administration.

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 Finance
- Customer Service Training
- Leadership Training
- Managing People
- Marketing/Sales Techniques
- Negotiating Skills
- Project Management
- Sales Training
- Time Management

**COMMERCIAL SKILLS**

- Building/Plumbing Codes
- Lay-out Drawing/Interpretation
- Pipe Installation
- Plumbing Design
- Plumbing Installation
- Project Plan Design
- System Fabrication
- Water Heaters Installation

**COMPUTER SKILLS**

- AutoCAD
- BuildPro
- Intermediate/Advanced Microsoft Office
- Sage 100 Contractor SQL
- SupplyPro
- Tablets/Windows

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:
Trofholz Technologies, Inc.

Small Business
ET19-0140

Approval Date: June 27, 2018
ETP Regional Office: Sacramento Analyst: K. Mam

CONTRACTOR

- Type of Industry: Technology/IT Services
  Priority Industry: ☑ Yes ☐ No

- Number of Full-Time Employees
  California: 40
  Worldwide: 70
  Number to be trained: 36
  Owner ☑ Yes ☐ No

- Out-of-State Competition:
- Special Employment Training (SET): ☐ Yes ☑ No
- High Unemployment Area (HUA): ☐ Yes ☑ No
- Turnover Rate: 2%
- Repeat Contractor: ☑ Yes ☐ No

FUNDING

- Requested Amount: $29,640
- In-Kind Contribution: $38,668
**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></td>
<td></td>
<td></td>
<td></td>
<td>Class / Lab</td>
<td>CBT</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Retraine Business Skills, Commercial Skills, Computer Skills, Cont. Improv., Mgmt Skills</td>
<td>30</td>
<td>8-60</td>
<td>0-6</td>
<td>$676</td>
<td>$16.70</td>
</tr>
<tr>
<td></td>
<td>Priority Rate SB &lt;100</td>
<td></td>
<td></td>
<td>Weighted Avg: 26</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraine Business Skills, Commercial Skills, Computer Skills, Cont. Improv., Mgmt Skills</td>
<td>6</td>
<td>8-60</td>
<td>0-6</td>
<td>$1,560</td>
<td>$13.66*</td>
</tr>
<tr>
<td></td>
<td>Job Creation Initiative SB &lt;100</td>
<td>Priority Rate</td>
<td></td>
<td>Weighted Avg: 60</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 (Final Payment) regardless of the wage expressed in this table. The highest minimum wage rate will prevail.*

- **Reimbursement Rate:** $26 SB Priority
- **County(ies):** Placer County
- **Occupations to be Trained:** Owner, Executive Staff, System Integration Staff, Professional Services Staff, Manager, IT Service Desk, Administrative Staff, Contract Staff, Business Development
- **Union Representation:** ☐ Yes  ☒ No
- **Health Benefits:** N/A

**SUBCONTRACTORS**

- **Development Services:** Sierra Consulting Services of El Dorado Hills assisted with development of this proposal for a flat fee of $2,900.
- **Administrative Services:** Sierra Consulting Services will also assist with administrative services for a fee not to exceed 10% of earned funds.
- **Training Vendors:** To Be Determined
OVERVIEW

Founded in 2002 and headquartered in Rocklin, Trofholz Technologies, Inc. (Trofholz) (www.trofholz.com) is a woman/veteran-owned information technology (IT) security firm specializing in physical infrastructure security, information security, and related IT services. Trofholz serves federal agencies such as the Bureau of Reclamation, US Army Corps of Engineers, and Department of Homeland Security. The Company has one California location, in Rocklin.

Need for Training

This is Trofholz’s second ETP Agreement and the second in the last five years. In this proposal, the Company will continue to build on training in the previous Agreement: transitioning into new markets and transforming from a language intelligence company to a service provider for security systems. Although similar to those provided in the prior Agreement, training topics in this Agreement will be more advanced. Trainees will not repeat the same training courses previously received.

Due to the increased sophistication of hackers and breaches, the Company will need to train staff on security software programs and systems to compete in the marketplace. Training in software programs like CompTIA, Avigilon, and CCPII will ensure trainees have the necessary skills to provide information security solutions to protect clients’ sensitive information and assets. Training in systems will provide staff with the knowledge to deploy, design, install and maintain security equipment.

Additionally, Trofholz will provide Certified Ethical Hacker Certification training to ensure staff are knowledgeable in finding weaknesses and vulnerabilities in systems using the same knowledge and tools as a malicious hacker, but in a lawful, ethical, and legitimate manner. Completion of this certification will allow workers to be more promotable in the IT industry while supporting customer demands and overall business growth.

Retrainee - Job Creation

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

Due to the challenging and time-consuming aspects of IT security, Trofholz will need to expand business capacity by hiring additional staff to meet demands. The Company has committed to hiring 6 new employees (Job Number 2). The Company is hiring System Integration Staff, Professional Services Staff, Business Development, and Administrative Staff. These trainees must be hired within the three-month period prior to Panel approval or during the term of the Contract. Trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Training will be delivered via Classroom/Laboratory E-Learning/Videoconferencing and Computer-Based Training (CBT) methods. In-house subject matter experts and, if necessary, vendors may be utilized to deliver training in the following:

Business Skills: Training will be offered to all occupations. Training will focus on improving customer service skills and marketing skills. Training topics include Customer Relationship Management, Negotiating, and Successful Selling Techniques/Sales.
**Commercial Skills**  Training will be offered to all occupations. Training will focus on designing, installing, and maintaining technical products and security systems. Training topics include Cybersecurity Design & Implementation, Product Knowledge, and Video Surveillance Systems.

**Computer Skills**  Training will be offered to all occupations. Training will focus on IT security, computer programs and internal software. Training topics include Antivirus, Autodesk.AutoCAD, and Quickbooks.

**Continuous Improvement**  Training will be offered to all occupations. Training will focus on improving internal processes and infrastructure. Training topics include Process Improvement, Quality Measurement Systems, and Teamwork Development Skills.

**Management Skills**  Training will be offered to the Owner, Executive Staff, and Managers. Training will focus on improving leadership skills and effectively motivating team members. Training topics include Decision Making, Supervisor Skills, and Teambuilding.

**Computer-Based Training (CBT)**

CBT, a more convenient means of delivering basic training, will be delivered to supplement class/lab training.

- Training Infrastructure

Trofholz has a detailed plan to administer training and is ready to begin upon approval. The HR Manager and a support staff will oversee all training and administration. Additionally, the Company has retained the services of a third-party administrator, Sierra Consulting Services, with extensive ETP Administration experience to assist with project administration.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes performance by Trofholz 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>ET16-0441</td>
<td>Rocklin</td>
<td>04/21/2016 – 04/20/2018</td>
<td>$58,552</td>
<td>$0.00 (0%)</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 1,142 reimbursable hours have been tracked for potential earnings of $29,736 (51% of approved amount). The final invoice is still pending review.

The implementation of Trofholz’s last Agreement was delayed due to the re-engineering process for new products took longer than expected. The HR Manager left the Company and the Company had difficulty administering the project while the position was being filled. Training was also delayed because the Company’s headquarters moved into a new building. Under this proposal, the new HR Manager will be dedicated to the administration of this project to ensure that training is the highest priority for all employees. Also, the Company has transitioned training schedules to adapt to busy seasons to ensure trainees receive the maximum amount of training. The current proposal has been “right-sized” consistent with prior earnings.
### Exhibit B: Menu Curriculum

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

8-60 Trainees may receive any of the following:

#### BUSINESS SKILLS
- Accounting
- Administration
- Business Fundamentals
- Business Performance
- Business Writing
- Communication Skills
- Conflict Resolution
- Cost Control
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Decision Making
- Employee Coaching
- Essential Skills for the New Supervisor
- Finance Skills
- Financial Analysis
- Leadership
- Marketing/Sales Techniques
- Negotiating
- Operational Skills
- Planning and Organization
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Relationship Building
- Sales
- Strategic Planning
- Successful Selling Techniques/Sales
- Teambuilding
- Time Management

#### COMMERCIAL SKILLS
- Access Control
- Cabling
- Certified Ethical Hacker Certification
- Cybersecurity Design & Implementation
- Design
- Engineering
- Product Knowledge
- Security System
- Video Surveillance Systems

#### COMPUTER SKILLS
- Antimalware
- Antivirus
- Avigilon
- Autodesk/AutoCAD
Trohloz Technologies, Inc.

CONTINUOUS IMPROVEMENT
- Cross Training
- Change Management
- How to Coach and Mentor
- Leadership Skills for Frontline Workers
- Process Improvement
- Problem Solving
- Quality Measurement Systems
- Quality Management
- System Failure Analysis
- Teamwork Development Skills

MANAGEMENT SKILLS (Owner only)
- Administration
- Coaching Procedures
- Decision Making
- Finance for Technical Managers
- Supervisor Skills
- Teambuilding

CBT Hours

0-6

BUSINESS SKILLS
- Advanced Telephone Techniques (2 hours)
- Business Writing – Grammar Works (2 hours)
- Conflict Resolution (2 hours)

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
DELEGATION ORDER

Training Proposal for:
Vital Research, LLC

Small Business

ET19-0127

Approval Date: June 27, 2018

ETP Regional Office: North Hollywood  Analyst: M. Reeves

CONTRACTOR

- Type of Industry: Services
  Priority Industry: ☐ Yes ☒ No

- Number of Full-Time Employees
  California: 30
  Worldwide: 30
  Number to be trained: 26
  Owner ☒ Yes ☐ No

- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 6%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $12,168
- In-Kind Contribution: $24,086
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 Imp., Mgmt. Skills</td>
<td>26</td>
<td>8-60</td>
<td>0-19</td>
<td>$468</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Class / Lab</th>
<th>CBT</th>
<th>Weighted Avg: 18</th>
</tr>
</thead>
</table>

- Reimbursement Rate: $26 SB Non-Priority
- County(ies): Los Angeles
- Occupations to be Trained: Clerical/Administration Staff, Project Coordination Staff, Project Management Staff, Director, Research Assistant, Research Analyst, Research Associate, IT Support Staff, Owner
- Union Representation: Yes
- Health Benefits: N/A

SUBCONTRACTORS
- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1982, Vital Research, LLC (Vital Research) is a consulting firm specializing in research and evaluation. Based in Los Angeles, the Company provides expertise in research design, survey development, data collection/management, and statistical analysis. Vital Research’s primary areas of focus include aging and disabilities, consumer feedback surveys, community service evaluation programs, and education and evaluation research. The Company’s clients include state government agencies, school districts, utility companies, universities and various foundations/associations.

PROJECT DETAILS

Vital Research continues to grow and has added various research projects from the states of Wisconsin, New Hampshire, Vermont and Oregon since its previous ETP project. The Company is also actively involved with a program called PACE (Program for All Inclusive Care for the Elderly), a nationwide program for seniors who are eligible for Medicare/Medicaid and
nursing home care, but prefer to remain in their home. The PACE program enables seniors to remain in their homes and still receive coordinated care and services. Vital Research collects data directly from PACE participants around the country via interviews to gather information that contributes to quality improvements. The Company also conducts similar work with nursing home and assisted living residents.

Vital Research’s varied list of services, clients and projects require staff to be adequately skilled and knowledgeable in the areas of survey design, communication, statistical analysis, presentation skills, information/data security, and project management. Confidentiality continues to play an important role in the services that Vital Research provides; therefore, employees must stay up-to-date on changes to federal laws such as the Health Insurance Portability and Accountability Act (HIPPA) and the Health Information Technology for Economic and Clinical Health Act (HITECH). In order to maintain internal layers of protection, the Company’s Information Technology team must also be sufficiently trained to store data securely, run web applications reliably, and monitor systems continuously.

Training Plan

Training will primarily be delivered via class/lab. However, a small percentage of training will be conducted via computer-based training (CBT) in specialized topics such as business analytics, survey development and data visualization.

**Business Skills:** Training will be offered to all occupations and focus on business planning, marketing and communication skills. This training will help employees make better business decisions and manage resources more efficiently.

**Commercial Skills:** Training will be offered to Research Analysts, Research Associates, Research Assistants and Project Coordination Staff. Trainees will study effective research and sampling methods, evaluation theory, data visualization, and multiple statistical programs for data analysis.

**Computer Skills:** Training will be offered to Research Assistants, Research Analysts, IT Support and Clerical/Administration Staff. Training will include computer networking, office automation, data and software security, Cloud computing and systems programming. Trainees will learn how to improve productivity through the use of innovative business application tools.

**Continuous Improvement:** Training will be offered to all occupations and ensure that all employees remain current on all aspects of project management, data handling and confidentiality requirements.

**Management Skills:** Training will be offered to Project Managers. This training will equip the Company’s leadership team with the skills to solve problems effectively, motivate employees, manage growth and promote team-oriented productivity.

Prior Performance

This will be the Company’s second ETP Agreement (See Prior Projects Table), and second in the last five years. Although Vital Research successfully delivered most of the training planned for the previous project, the Company was not able to address all areas originally targeted due to business demands. Therefore, this proposal reflects a continuation of training to support the Company’s plans for growth and improvement in the areas of human resources, marketing and project development. The proposed Curriculum includes several new Computer and...
Commercial Skills topics in response to ongoing changes in competency requirements and industry standards.

This proposal includes employees who may have participated in the previous contract, as well as some reoccurring Curriculum topics. However, the subject matter has been updated and/or changed, so there will be no duplication of training.

Training Infrastructure

The President will oversee project administration and the Human Resources Generalist will coordinate the scheduling, delivery and tracking of training. Training will take place at the Company’s location in Los Angeles, and will be provided by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Vital Research 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>ET16-0303</td>
<td>Los Angeles</td>
<td>12/31/15 – 12/30/17</td>
<td>$11,616</td>
<td>$8,829 (76%)</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

**Class/Lab Hours**
8 - 60

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Business Administration
- Strategic Planning, Evaluations, Monitoring
- Business Model Development
- Marketing
- Business Planning
- Communications (report writing, content analysis, research evaluation, client interfacing)

**COMMERCIAL SKILLS**
- Data Visualization
- Statistic Programs (SPSS, SAS, R)
- Research Methods
- Sampling Methods
- Survey Development and Design
- Evaluation Theory
- Qualitative Analysis

**COMPUTER SKILLS**
- Office Automation
- Computer Networking (hardware, software)
- Cloud-Based Data Security and Storage
- Data Transmission
- Microsoft Certified Systems
- Amazon Web Services
- Security Software
- Microsoft Azure

**CONTINUOUS IMPROVEMENT**
- HIPPA Compliance
- Confidentiality
- HITECH Requirements
- Data Handling
- Project Management (strategic planning, evaluations, monitoring, scheduling, data, Census, interviewing/surveys)

**MANAGEMENT SKILLS** (Managers Only)
- Leadership Development
- Time Management
- Team Building
- Motivation
- Problem Solving
- Critical Thinking
**CBT Hours**

0 – 19

**COMMERCIAL SKILLS**

- SurveyGizmo.com – Online Survey and Email Campaigns (7 hours)
- Power BI – Data Visualization Tools (5 hours)
- Evergreen Data Visualization Academy (7 hours)

**Note:** Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.