

PANEL PACKET

June 2018





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M e m o r a n d u m

To: Panel Members

Date June 22, 2018

From: Stewart Knox
Executive Director

File: Panel Memo Doc.

Subject: **Directions to Meeting Site**

The Employment Training Panel will meet on FRIDAY, **June 22, 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**



M e m o r a n d u m

To: Panel Members

Date June 22, 2018

From: Stewart Knox
Executive Director

File: Mtg. Site Memo

Subject: **Future Meeting Sites**

June 22, 2018	California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814
July 27, 2018	California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814
August 24, 2018	California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814
September 28, 2018	California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814



**STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL**
California Environmental Protection Agency
1001 I Street
Sierra Hearing Room, Second Floor
Sacramento, CA 95814
May 24, 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

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL
California Environmental Protection Agency
1001 I Street, Sierra Hearing Room, Second Floor
Sacramento, CA 95814
May 24, 2018

I. PUBLIC PANEL MEETING CALL TO ORDER

Chairperson Barry Broad called the meeting to order at 9:40 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 March 23, 2018. No changes were suggested or made.

ACTION: Ms. Roberts moved and Ms. Bell seconded the motion that the Panel approve the Minutes from the March 23, 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 \$11.8M, with approximately \$811K in Delegation Orders, for a grand total of just over \$12.6M.

It was noted that Tab #30 has been pulled, and Tab #36 should be moved to consent.

It was reported that the following people were in attendance to present Proposals: Gregg Griffin, North Hollywood Regional Office Manager; and Anna Nastari, San Francisco Bay Area 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 \$0.5M remaining for ARFVTP proposals this year.

It was reported, regarding Core Funds for Fiscal Year (FY) 2017/18: that upon the Panel approving the just over \$96M in projects for this year, ETP will have approximately \$0.0M for the remainder of FY 2017/18.

It was reported, regarding Delegation Orders: that all such project proposals are capped at \$50,000; that all such project proposals are to be approved by the Executive Director on a continuous flow basis; and that the 21 projects subject to Delegation Orders for today's Panel Meeting total just over \$811K.

It was reported, regarding 2017/18 total program funding to date: that approximately 800 projects have been submitted to the Panel, with a value of just over \$145M; and if all project proposals for today's Panel Meeting are funded today, that the Panel will have approved 474 projects, with a value of just over \$96M.

It was reported, regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at \$51M in demand, with \$0.00 in allocation; Multiple Employer Contract (MEC) requests are at \$12M in demand, with \$0.00 in allocation; Small Businesses requests are at \$4.8M in demand, with \$0.00 in allocation; Critical Proposals are at \$1.1K in demand, with \$0.00 in allocations; and Apprenticeship programs are at \$6.1M in demand, with \$0.00 in allocation. Overall demand is approximately \$70M.

It was reported that the number of total projects in FY 2017/18 in the Regional Offices is 367; that the total number of projects currently in the Applications and Assessment Unit is 107; and that the number of total projects is 474.

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 there are a lot of bills on Workforce Development and Cannabis; as well as one bill specific to ETP, AB-2420, which is an amendment to ETP Legislation to add soft skills as an appropriate use of ETP Funds. Since AB-2420 updates employer terminology and does not make any substantive changes to the program, staff opinion has been neutral to date on AB-2420.

VII. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

Chairperson Broad asked for a motion to adopt Consent Calendar Items #1 through #29.

Advanced Medical Management, Inc.	\$103,800
Alta Newport Hospital, Inc.	\$142,560
Amro Fabricating Corporation	\$ 96,640
Associated Construction and Engineering, Inc.	\$193,840
Bonney Plumbing, Inc.	\$249,690
Build.com, Inc.	\$ 76,600
Charlie's Enterprise dba OK Produce, Inc.	\$248,325
CSP Fiber Services	\$187,318
Farmers Group, Inc.	\$220,200
HP Hood, LLC	\$183,760
Ingomar Packing Company, LLC	\$215,280
Kagome, Inc.	\$247,680
Karl Storz Endoscopy-America, Inc.	\$234,576
Lancaster Burns Construction, Inc. LB Construction, Inc.	\$247,964
Lili Mirtorabi, D.D.S., APC	\$130,680
Matthew Warren, Inc.	\$206,280
Menchie's Group, Inc.	\$ 96,360
Profit Recovery Partners, LLC	\$ 95,480
Quick Cret Products Corp.	\$ 83,090
Reliance Home Services, Inc.	\$210,000
Safety Striping Services, Inc.	\$ 53,040
Space Exploration Technologies Corp.	\$177,148
The Honest Company, Inc.	\$214,942
The SYGMA Network, Inc.	\$146,448
Triumph Aerostructures, LLC	\$235,872
Ultimate Formulations, Inc. dba Best Formulations	\$105,960
VCI Construction, LLC	\$166,800
Western Digital Corporation	\$157,300
Zodiac Seat Shells, U.S., LLC	\$ 99,136

It was questioned whether the issue of wage progression in regards to Menchie's Group Inc. (Tab #17) was resolved. Gregg Griffin, North Hollywood Regional Office Manager, stated the wage shown for all occupations is \$16.96; that \$16.96 is used for ease of administration; and that some occupations actually exceed \$16.96.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion to approve the consent calendar for Items #1 through # 29.

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. Bell seconded the approval to delegate authority to the Executive Director in event of a loss of quorum.

Motion carried, 7 - 0.

IX. PRESENTATION OF EXECUTIVE DIRECTOR, STEWART KNOX

Mr. Knox stated that he will now go through his presentation, and he will be suggesting action items, as he has done annually in the past. Mr. Knox explained that the suggestions here are only recommendations, and that the Panel can certainly make changes.

Mr. Knox reported that a 3-year review of ETP conducted by staff revealed the following:

As for funding: In FY15/16, ETP had a total of approximately \$97M in projects. In FY16/17, ETP had a total of approximately \$96M in projects. This year (FY17/18), ETP is looking at close to a total of \$100M in projects, with ETP currently at \$96M in terms of allocations out to date. Mr. Knox reported that this year was the highest since 2006, but explained that the amount can drop, like it dropped to \$45M in 2011, which is a good reminder that these amounts may quickly rise and fall.

As for projects: In FY15/16, there were 403 approved projects. In FY16/17, there were 473 approved projects. This year (FY17/18), ETP is looking at 474 projects. Note that there is a drop in the increase of projects, even though ETP has more funding. That is due in part to the fact that Multiple Employer Contractors are picking up some smaller employers. Additionally, ETP has more projects with partners such as CBO, CMTA, CPC, the community college system, and with JATCs, which is good news because this was part of the drive to ease the ETP process. Mr. Knox stated that ETP will continue moving in that direction.

As for trainees: In FY15/16, there were 105K workers trained. In FY16/17, there were 106K workers trained. This year (FY17/18), ETP is projected to train 110K workers. Mr. Knox stated that ETP has some of the lowest costs per workers for training in the State of California. Other systems cost well into \$5,000-\$6,000, whereas ETP is about \$1,500-\$1,600. Mr. Knox noted that ETP is different because it serves incumbent workers, whereas a lot of other programs are doing only job creation.

As for ETP funding strategies: Mr. Knox reported that Multiple Employer Contracts are working well. Single Employers continued to grow, with small business leveraging resources with MECs, and Robert's Team is good about trying to get those, and encourage small businesses to move into max critical proposals. In regards to outreach, Mr. Knox indicated that there's been discussion about women in the trades, and Panel Members have some ideas that we may take to committee in the future in order to encourage more women in the trades. Mr. Knox reported that ETP's numbers in terms of women have dropped over the years, and ETP is now at about 70/30 in terms of men versus women in different programs. Mr. Knox noted another funding strategy, which is to increase the cap on MECs. The purpose of all of this is to appropriately manage the fund, and direct staff resources on both sides of the house, ours as well as the contractors. Mr. Knox also noted that ETP has been working with quite a few other groups, and they may have some comments about ways to better

manage the fund. Mr. Knox explained that if a MEC comes in above the current \$950K, and it's one of the recommendations in the panel packet, then they will need to wait a full 18 months. Again, this is just one funding strategy to try to better manage the fund.

Mr. Knox then spoke about allocated funds based on historical demand, and how this seems to be working really well in terms of the way we are currently managing the fund.

As for Priority Sectors: Mr. Knox reported that this area hasn't really changed that much over the years, and the priority sectors include manufactures, IT, multi-media, entertainment industry, goods movement, transportation logistics, agriculture, and healthcare. Mr. Knox noted that ETP would like to do more outreach with regard to multi-media projects, and ETP has had some good intake in the healthcare industry in the last few years, along with green construction, technologies, and technical services.

As for Lowest Funding Priorities: Mr. Knox reported they are the same; including adult entertainment, commission sales occupations, retail trades, gambling, mortgage banking, car dealerships, multi-level marketing, training for employees for training agencies, truck driving schools, partners, and principles.

As for Methods: Mr. Knox explained that this area is developed by the Governor, and ETP staff works closely with Labor Agency within certain categories. Mr. Knox noted that the major issues include industry certifications (looking at how we can incur more certifications in the future), non-traditional apprenticeship programs, women and minorities within the trades, green industries, critical proposals funded by GO-Biz, business expansion retention activities in special populations, and veterans.

Mr. Broad stated that an area that he thinks the Panel should consider targeting is permanently disabled injured workers who are returning to work. Mr. Broad noted that these workers cannot return to their prior job, and often only get a voucher for about \$6,000 from worker's compensation. Mr. Broad explained that, particularly in higher wage categories, permanently disabled injured workers never earn the same amount of wages again, and the foregoing creates all sorts of issues, including psychological ones. Mr. Broad acknowledged that this is a difficult population to serve, but he thinks that ETP should make a special effort to do so. Mr. Broad used an example, stating that an injured construction worker might go to a community college, where they could learn other related areas; other areas related to construction, such as estimating and preparing plans, so that they could return to a higher earning capacity. Mr. Broad stated that maybe the \$6,000 voucher, combined with ETP training, could assist in restoring permanently disabled injured workers.

Ms. Roberts asked whether there is an agency that supports this group of individuals.

Mr. Broad responded no, not really, and generally explained what happens when someone is at the end of the workers compensation system. Mr. Broad noted that there are some rehabilitation professionals in this area, but the injured workers would probably be better off going to some actual education program, where they can obtain a certificate and move into a different job. The answer is mostly no, and that's why you generally don't see something at a community college just for them; but they work with the Department of Industrial Relations, which oversees the workers' compensation system. Mr. Broad stated that the fantastic thing about the ETP program is that ETP is aiming to put persons in a job, and right now they pick other training programs where there is little or no hope that there is a job at the end.

Ms. Newsom asked whether the concept is to put forth a new priority, and would ETP be reimbursing at a higher rate similar to what we do with veterans.

Mr. Broad said he would like it to be like that; i.e., to reimburse at a higher rate, but not to prescribe how to do this at this meeting, because Mr. Broad is now only suggesting an

experiment. Mr. Broad questioned whether the Panel wants to bring this issue back as an amendment to whatever is adopted by the Panel today.

Ms. Newsom stated that maybe this is an issue to be brought up in committee. Ms. Newsom stated that she is supportive of the concept, but she's not supportive of reducing the wages of these people (and also the veterans too) under a new job creation program.

Mr. Broad stated that this group of people is by definition a group of workers, and the intent would be to erase the job wage loss, not reinforce it.

Ms. Newsom agreed.

Mr. Broad asked the Panel for suggestions on ways to proceed.

Mr. Knox said that we can add this new concept as a method of outreach to our strategic plan, and that we should bring this matter to committee. Mr. Knox stated, since we are talking about piloting something new, that we should also reach out to community colleges, disabled student services, and people at DIR in order to come up with some policy decisions that could be brought up at committee level for consideration.

Mr. Broad asked whether there was any objections, and none were made. As such, Mr. Broad stated that this matter shall proceed at the policy committee level by bringing up the proposal and going forward with the ideas discussed today.

Mr. Knox then moved onto proposed funding allocations by category, which he indicated is pretty close to the same every year: single employer contracts at \$48M; multiple employer contracts at \$24M; small business contracts at \$6M; critical proposals at \$5M; non-traditional apprenticeships at \$20M; for a total of \$103M. Mr. Knox stated that we are looking to increase incumbent levels to 40% from the current 38%. Mr. Knox indicated that the fund is being managed in a smart way, and in the event of an economy downturn, we are going to the fund at a higher level from the incumbent's rate.

As for the Funding Caps: Mr. Knox reported that this area is a little bit different from last year, but not too much, and as the Panel knows, they can always change the funding caps at any time. So in the event ETP is experiencing too much money loss, we would bring the issue of funding caps back with a proposal. That being said, Mr. Knox stated that the proposed cap for multiple employer contracts is \$950K, which will remain at the one year level. If it's above \$950K up to \$1.8M, then they would be held at the 18 month period, so that they are not coming back too often. Mr. Knox said the foregoing is doing two things: it's trying to manage the money and managing staff resources on both sides of the house. In regards to Single Employer Contracts, Mr. Knox reported that we've increased from \$750K to \$900, and he's also asking for a raise in delegation contracts from \$50K to \$75K, which is still under the \$100K cap stated in ETP Legislation. Mr. Knox reported that Critical Proposals are at the same rate as they were at last year, and he thinks that it worked well, but the Panel always has the authority make changes. Mr. Knox stated that one of the other issues concerns the \$250K or less cap on consent. Mr. Knox reported that staff is seeing quite a few proposals coming in at \$249,999, so the suggestion is to change that down to \$200K, but reminded everyone that the Panel can always see any proposal at their request.

Mr. Knox spoke about ETP funding, and explained that he will continue to update the Panel on the status of the fund. Mr. Knox noted that the fund status is always stated at every Panel Meeting, so if there are ever any questions about the status of the fund, please let us know.

Mr. Knox stated that a strategic study was implemented; that to date there have been a few drafts of the strategic study; and that Peter Cooper is going to have more about the strategic study during a future Panel Meeting. Mr. Knox noted that much of the information in the draft

reports to date is nothing new. It includes comments about the program being too complex; but Mr. Knox also explained that there is a lot of good information in the draft reports about the positive impact of the ETP program.

Mr. Knox then discussed ETP's strategy for employer outreach training for specific occupations, and Mr. Knox explained that ETP will continue with 70% plus 1 year contracting again, unless the Panel wants to up that, because sometimes there are questions at 70%.

Mr. Knox requested that the Panel approve the items as presented, so again priority industries, funding allocations, funding caps on incumbents levels, reimbursement rates, which is in your packets, and the repeat contractor rule, which has been discussed several times at the committee level, as either an action on each one of them or as a whole.

Mr. Broad asked for any questions from Panel Members.

Ms. Roberts asked a question on the reimbursement rates: In regards to small business, we have them under the \$26 reimbursement rate, but if a small business is a non-priority industry, does it default to non-priority? And then, in regards to productive lab, are we going to continue to fund the productive lab at the same rate of \$26 per hour?

Mr. Knox responded by stating that it's up to the Panel, but in looking at productive lab, we see each proposal is different. Each proposal is different so we leave the flexibility for Panel Members to make those determinations on a case-by-case basis, which Mr. Knox said he thinks is valued. Mr. Knox noted that many of the apprenticeship programs are actually in a productive lab situation; even some of the new non-traditional apprenticeship programs. Mr. Knox said we will bring those to the panel with recommendations one way or the other.

Ms. Roberts said it seemed like it might be fair to reduce it to \$21 per hour because that's what we have had on the apprenticeship programs. Ms. Roberts noted it's just something to think about, and that she previously brought it up in committee.

Mr. Knox said it depends on what you would like. We could change it, although Mr. Knox stated that because we have already worked in the June prior projects.

Ms. Roberts said she is not proposing anything at this time, but in her mind, the efficacy of productive lab has always been a concern to Panel Members, and she wanted something for the committee to think about down the road.

Mr. Broad and Mr. Knox agreed to watch and monitor the issue.

Mr. Broad asked whether there were any more Panel Member questions. There being none, Mr. Broad then asked whether there was any objection to taking this as a whole in one motion. There being none, Mr. Broad then asked for public comment.

PUBLIC COMMENT

Steve Duscha endorsed the Executive Director's proposal in its entirety, and stated that he is looking forward to more changes simplifying the program from the committee.

Ms. Newsom made a motion to approve all action items as outlined in the Executive Director's proposal. Ms. Roberts seconded the motion.

John Brauer, Workforce and Economic Development Director at Cal Labor Fed, stated that he has been speaking with ETP staff about an analysis his group has done in regards to ETP applications. Mr. Brauer is particularly interested in apprenticeship programs, and the historical nature of the apprenticeship application process; and Mr. Brauer wants more

money going toward JATC programs. Mr. Brauer stated that JATC programs involve thousands of employers, many of which are small businesses. Mr. Brauer stated that the skills JATCs provide, in partnership with labor unions, are cutting edge and enable California to have a thriving economy. Mr. Brauer stated that you all have played a big role in coming out of the recession by providing funding for those JATCs. However, Mr. Brauer stated he is concerned about the ETP process, and wants to make sure that increased funding isn't going to adversely affect JATCs. Mr. Brauer stated that his staff person, Jan Borunda, and Kelly Greer, who works for their consultant Workforce Strategy, researched the ETP application process, and wants to present their findings in regards to how the ETP application process impacts apprenticeship programs.

Kelly Greer, Workforce Strategy, commenced a presentation by stating her group found that there are three basic categories of programs: (1) Programs that last for one year; (2) Programs that last 18 months; and (3) Programs that last for 24 months. How they fall into these different categories is the result of the number of training hours provided by the JATC, the size of the JATC, and when they enter into retention. So for the 12-month programs, those folks have 200 hours of training per year. Ms. Greer noted that generally includes the electricians, the pipefitters, the sheetmetal workers, and a large umbrella organizations that serve over 100+ employers. Ms. Greer noted that the 18-month group are folks who do 120 to 200 hours of training per year, and they likely take longer to hit the 500 hours retention time. The 24-month folks have the lower training hours, with about 80 hours-120 hours. Ms. Greer noted that the 24-month group also come in at different times, don't move in cohorts, often take longer to reach retention, and are often in rural areas, or less urban areas.

Ms. Greer then explained why this information is important in regards to invoicing. So for the year programs, they will be coming around every year for more cash because they don't have anybody else to train. They have already used your 200 max, and then they will be able to drop in Summer a lot of those, which we want them to do because in a good economy it matters somewhat that people go into retention during the Summer, but in a bad economy it's really important in construction because that's the time of the year that folks work. As one of our directors said "we're farmers, we work during the Summer."

Ms. Greer explained what they are hoping to do, which is to set up a system that would also function well in a bad economy. Ms. Greer thanked Stewart Knox and Peter Cooper for answering her questions while conducting her research. Ms. Greer stated that her research reveals that the 12-month projects actually last for a year and 10 months, from start to finish; that the 18-month projects actually last 2 years and 4 months, from start to finish; and that the 24-month projects actually last 2 years and 7 months. Therefore, referencing her slides, the largest amount of funding actually goes to the 12-month projects, followed by the 18-month projects, followed by the 24-month projects. Ms. Greer then pointed out the number of actual projects, and stated that there are around 26 projects that will be coming around every year, which creates flexibility in the event the economy starts to have issues.

Mr. Broad questioned how many registered apprenticeship programs are in the state. Mr. Broad thinks that it would be interesting to see what percentage of the total number of apprentices were actually trained by ETP funding.

Mr. Brauer stated that ETP should be able to obtain that information from DAS.

Ms. Greer stated that the majority of people that are interested in receiving ETP funding have already got in line, which consists of many small organizations. Ms. Greer stated that her research and the discussion thus far has been based on historical information, at which time Ms. Greer then moved to a discussion and slide presentation about how funding is pulled down once it's invoiced, using a hypothetical recession in FY20/21. Ms. Greer explained that her research reveals that there is a pattern, with 12-month projects pulling down the majority of their funding ever year, whereas 24-month projects take longer, and it may balance out,

but Ms. Greer questioned whether that will happen with funding during a recession. Ms. Greer stated that when a recession hits, two things are going to happen to the apprenticeship programs: (1) with people working less, the one year programs are going to become one and a half, the one and a half year programs are going to become two years, and the 2 year programs are going to be reduced in invoicing because they will not be able to clear enough people through the program; and (2) your going to have a pretty steep decline, and that decline is going to keep following the enrollment of the apprenticeship program.

Ms. Greer then talked about apprenticeship programs not being like community colleges because apprenticeship programs cannot open the door and accept 3,000 people. Ms. Greer stated that apprenticeship programs look and see what work is in an area in order to bring people into their program. Ms. Greer stated that once they start seeing a recession happening, they will not be bringing in the first year, which will result in a decline of JATC participation. Ms. Greer also stated that JATCs are not going to be receiving money they cannot spend, and ETP isn't going to be overfunding them, because there are things innate in their program. Ms. Greer said that they are going to make sure that they are not overfunded and depleting ETP resources during some kind of recession.

Ms. Roberts stated that apprenticeship programs have been a boom for ETP, by performing at higher levels than we generally see. Ms. Roberts indicated that apprenticeship programs are at 100% most of the time, which has a positive impact on ETP's overall success rate.

Ms. Greer noted that their success rate is the result of district offices making sure that the numbers are correct and verifying them.

Rob Sanger, California Manufacturers Technology Association, stated that he agrees with Steve Duscha in that the Executive Director's proposal includes great changes that should simplify the program, making things easier for contractors to participate. Mr. Sanger also stated that he has worked on the apprenticeship side, and does not see an industry demand nor hears that there is such a demand from his clients. Mr. Sanger indicated that Gallo was one of this clients. Mr. Sanger said the money should be tracked to determine whether it's going toward new jobs or just funding current apprenticeship programs. Mr. Sanger said he thinks something to be tracked is how many new jobs are really created, or are we just funding existing programs that are successful, which maybe that's okay too, but Ms. Sanger thinks we need to be transparent about that.

Mr. Broad stated that there's a motion on the table to approve all action items as outlined in the Executive Director's proposal, with the modification to add permanently disabled injured workers where appropriate.

ACTION: Ms. Newsom moved to approve all action items as outlined in the Executive Director's proposal, with the modification to add permanently disabled injured workers where appropriate, and Mr. Tweini seconded.

Motion carried, 7 - 0.

Mr. Knox's Memorandum recapping the above as well as Ms. Greer's presentation are attached separately to these minutes.

X. REVIEW AND ACTION ON PROPOSALS

Single Employers

Tab # 30 – Pandora Media, Inc.

PULLED AT THE REQUEST OF THE VENDOR

Tab #31 – Renew Health Consulting Services, LLC

Mr. Griffin presented a proposal on behalf of Renew Health Consulting Services, LLC (Renew) in the amount of \$560,852. Founded in 2015 and headquartered in Monrovia, Renew specializes in providing senior care. The company provides certified skilled nursing care and rehabilitation services. Services include short-term and long-term skilled nursing care, hospice care, medication management, behavioral health support, traumatic brain injury, wound treatment, dementia care, and special dietary and meal services. There will be 15 Renew facilities in California participating in this proposal.

Mr. Griffin introduced Carol Detullio, Sr. Vice President of Clinical Services, Cheryl Patterson, Vice President, and Claudia Aquinio, Vice President of Human Resources and Risk Management.

Ms. Roberts expressed concerns that the project was not conservative, and that the project looked too ambitious due to there being 15 locations, a first-time contractor, and numerous employees. Ms. Roberts indicated that \$250k would be conservative, and reminded the contractor about the difficulties of performance. Ms. Roberts said she thinks the Panel needs to look at this project more conservatively, and that there's no downside to lowering the contract amount now, then come back later and get the full amount by way of amendment. Ms. Roberts indicated that she sees those amendments all of the time.

Ms. Patterson responded by stating they have a gatekeeper which in the director of staff development at each location; that those gatekeepers are responsible for the internal training within our facilities, as well as the documentation process. Ms. Patterson noted that the documentation process is something that they already do, whether it's on an ETP form or their own internal forms. Ms. Patterson also noted that they conduct training all the time with their new hires, and with their existing nursing staff, so training is a big part of what they already do.

Ms. Roberts asked why they have not submitted an application to ETP in the past?

Ms. Patterson said that the current company started in 2015, but they themselves have been in the industry a long time with other companies.

Ms. Aquinio said they have union support as well, and they are very union friendly.

Ms. Roberts noted that CNAs have the highest turnover ratings in the business, but their turnover rate is only 6%, which is pretty low for the business. This may demonstrate that they have a very good model; but things change and people move on to different companies, and the success rate drops below acceptable amounts, which is something she has seen many times. Ms. Roberts restated her concern that the contract would not be successful.

Ms. Aquinio stated they are confident that they can successfully manage the contract, and that is why it was important for the principles of their company to come here today. Ms. Aquinio explained that the CNA training program is extremely important too, especially in such a volatile time, with the staffing ratios that are being implemented, which is why they already implemented the forms into their facilities already.

Ms. Dutillo also stated that they have already implemented the forms, and she feels that as the Senior VP of Clinical Services, this ETP funding would really help retain and maintain their nursing staff, which is under a lot of competition.

Ms. Roberts said she was not inclined to approve at the current funding amount.

Mr. Broad questioned how many times an applicant has come back after the Panel bifurcated funding, which Mr. Broad thinks is probably less than 50%, which Mr. Broad thinks would be a good indicator that the Panel is usually guessing right when bifurcating out of concerns of whether the contract is too large and will be unsuccessful.

Ms. Bell suggested downsizing the current contract by cutting it in half. Ms. Bell stated that there is nothing wrong in downsizing; that it's part of the process; and that the Panel's goal is for contracts to be successful. Ms. Bell stated that she would make such a motion.

Mr. Broad acknowledged the motion.

Mr. Tweini said that he shares the same concerns of his colleagues, and Mr. Tweini supports such a motion.

Mr. Broad acknowledged a motion to accept the proposal by cutting it in half, without prejudice, which means that the applicant can come back for the second half after completing a significant portion, and acknowledged a second to said motion. Mr. Broad asked for any other discussion on the motion.

Ms. Roberts indicated that all the applicant would need is 70%; which their consultant could monitor, and they could come back when that amount is reached.

Mr. Knox reminded everyone that the applicant would have to come back to panel in order to amend and receive the other half. They do have to come back before the panel.

Mr. Broad indicated that he doesn't think the Panel has ever turned down a request for the second half of funding when the Panel has bifurcated in this way.

Mr. Broad then restated the motion for vote.

ACTION: Ms. Bell moved to reduce the amount $\frac{1}{2}$ with the caveat that Renew can come back for the second half once it meets the 100% from the first half and Mr. Tweini seconded approval for Renew Health Consulting Services, LLC in the amount of \$280,426.

Motion carried, 7 - 0.

Tab #32 – Elevate Home Health, LLC

Mr. Griffin presented a proposal on behalf of Elevate Home Health, LLC (EHH) in the amount of \$361,550. Founded in 2009, EHH offers comprehensive, patient-centered, post-acute care program designed to ease and support patient transition following in-patient stay.

EHH's program begins during rehabilitation or hospital stay and extends through the patient's discharge to home. Utilizing a licensed nurse, the focus is on patient education, primary care collaboration, medication reconciliation, assistance with equipment and home modification needs, and provision of care as ordered by physicians. The company's home health services include skilled nursing, physical, speech, and occupational therapy; medical social work; and in-home aide.

EHH is a subsidiary of Covenant Care California, LLC (Covenant). Covenant currently has an active ETP project and will not participate in this proposal. EHH will act as a lead contractor and include closely affiliated entity, Rehabfocus Home Health, Inc. (RHH). This project will target training for workers at one EHH facility located in Los Angeles County and six RHH facilities located in San Joaquin, Fresno, Santa Clara, Monterey, San Diego, and Stanislaus counties. EHH's headquarters in Aliso Viejo will coordinate the proposed contract; however, is not included in the proposed training plan.

Mr. Griffin introduced Gytha Mannen, Director of Clinical Operations of Home Health.

There were no questions from the Panel Members.

ACTION: Ms. Newsom moved and Ms. Bell seconded approval for Elevate Home Health, LLC in the amount of \$361,550.

Motion carried, 7 - 0.

Tab #33 – Meggitt (San Diego), Inc.

Mr. Griffin presented a proposal on behalf of Meggitt (San Diego), Inc. in the amount of \$948,790. Incorporated in 1980 and headquartered in Simi Valley, Meggitt-USA, Inc. manufactures electronics and aerospace products, including flight displays and avionics instruments, unmanned aerial vehicle ducting and sealing products, and aerospace fire detection systems, industries served include aerospace/aeronautics, engineering, electronics, law enforcement, civil aviation, medical, oil, automotive, petrochemical, marine and government industries. Meggitt-USA, Inc., is the parent company for Meggitt subsidiaries, all which operate independently.

This is Meggitt (San Diego), Inc.'s first ETP proposal. This training proposal will only target Meggitt (San Diego), Inc. workers. Meggitt (North Hollywood), Inc., Meggitt Safety Systems, Inc.; and Meggitt (San Juan Capistrano), Inc. have held prior ETP Agreements.

This proposal for Meggitt (San Diego), Inc. has been designated a Critical Proposal by the Governor's Office of Business and Economic Development based on Meggitt's planned business expansion/commitment to adding new jobs in California.

Mr. Griffin introduced Thomas M. Autcher, Senior Director of Finance.

Ms. Bell questioned whether the employees at the two locations would be relocated to the new location.

Mr. Autcher stated yes, and indicated that the new location is across the street.

Ms. Bell questioned and it was confirmed that there will be no layoffs due to the move.

Mr. Tweini asked about the whether veterans would be beneficiaries of this training, and if so, at what percentage.

Mr. Autcher responded by stating that he did not know the number, but that they have a number of veterans on staff, and they look for veterans to hire in San Diego. Mr. Autcher also noted that their primary customer is the U.S. Government, and so for that reason too, they encourage veterans to apply because they are a known workforce.

Ms. Roberts stated that she thinks this is a great contract that looks solid. Ms. Roberts then asked about a contractor indicated in the documents from Texas, and whether that contractor is familiar with the ETP program.

Chuck Connor responded by stating that he's had 20 years in California State politics before moving to Texas; that he wouldn't say he's Texan, but that's where he lives; and that he is familiar with the ETP program and the work of Meggitt as a company.

Ms. Roberts asked whether Mr. Connor was familiar with the Texas Workforce Commission, and Mr. Connor responded by stating that they work with Meggitt USA in regards to other state programs, but Mr. Connor thinks that ETP is top notch and goes above and beyond what all other states are doing with workforce development.

Mr. Autcher indicated that they are a subsidiary of a publicly traded company, Meggitt DLC, which was just traded in the UK.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval for Meggitt (San Diego), Inc. in the amount of \$681,000.

Motion carried, 7 - 0.

Tab #34 – Orange County Global Medical Center, Inc.

Mr. Griffin presented a proposal on behalf of Orange County Global Medical Center, Inc. (Orange County Global) in the amount of \$425,700. Founded in 2003 and headquartered in Santa Ana, KPC Health operates seven autonomous acute care hospitals located throughout Southern California. Orange County Global will be the lead affiliate contract holder with three other KPC Health affiliated hospitals participating in this project: Anaheim Global Medical Center (Anaheim Global); South Coast Global Medical Center, Inc. (South Coast Global); Chapman Global Medical Center, Inc. (Chapman Global). The Hospitals are eligible for ETP funding under Special Employment Training (SET) provisions for frontline workers.

Mr. Griffin introduced Jeff Andrews, Physician Contracting & Clinic Manager.

Ms. Roberts questioned, since there was only a 70% success rate on only one facility in regards to a previous contract, why the applicant is coming back for double the amount for 4 facilities.

Mr. Andrews responded by stating that the previous contract with the one facility was a problem because one of the directors became very ill, and Mr. Andrews was forced to step in after learning the ETP program. Mr. Andrews noted that it was very difficult, but that he was able to learn the program. Mr. Andrews thinks that hitting 71% after the foregoing was an accomplishment in putting the contract back on track.

Ms. Roberts stated that she thinks the project is ambitious, asking for 4 facilities and double the amount. Ms. Roberts also expressed concern with Mr. Andrew's role, as he's a clinical manager, and that did not sound like a training manager.

Mr. Andrews restated that he performed the previous ETP contract, so they decided stay with him for this contract.

Ms. Roberts indicated that she's not favorable toward funding at this amount, and then asked whether the applicant is headquartered in one facility.

Mr. Andrews responded by stating that he's headquartered in Orange County.

Ms. Roberts asked about the other facilities.

Mr. Andrews stated that he already has people who will take care of all 4 Orange County hospitals.

Mr. Griffin said that the applicant has 2,400 employees throughout the state, and that this project includes 496. Mr. Griffin also indicated that the current proposal is for only 20% of their employees, which means there are considerably hundreds of more trainees that could participate in order to meet the demand goal.

Ms. Roberts indicated that the applicant is retraining, and that there are no new hires here. Mr. Roberts then stated that she would like right-size the project down to the amount earned last time; maybe 70% of the amount asked in the proposal.

Mr. Knox said and Ms. Roberts agreed to about \$300K.

Mr. Broad asked whether that was a motion.

Ms. Roberts said yes.

Mr. Broad acknowledged a motion to approve this project funded at a level of \$300K.

Ms. Newsom seconded motion.

Mr. Broad asked for any further discussion.

Ms. Bell indicated that if it was up to her, she would not fund this project at all, based on past performance. Ms. Bell stated that she didn't feel like the applicant would be there for the four facilities, but stated that she would agree to right-sizing. Ms. Bell then stated that she would recommend down-sizing the project a little bit more.

Mr. Broad asked whether that was a substitute motion or just a comment.

Ms. Bell said it was a substitute motion.

Mr. Broad acknowledged the substitute motion.

Mr. Tweini asked whether these are all new trainees or new help.

Mr. Andrews responded by stating that these are current employees: Current RNs, LVNs, Allied Health, and possible new grads as well as new hires.

Mr. Broad asked whether there is a second for this substitute motion.

Ms. Roberts seconded it.

Mr. Broad stated that he was not going to vote for the substitute motion, and explained that his decision was because 70% is the bottom threshold for full funding. Mr. Broad explained that right-sizing here is appropriate, but he doesn't want to be punitive and thinks the first motion strikes a better balance.

Mr. Broad then called for a vote on the substitute motion, which failed, with only Ms. Bell voting in favor.

Mr. Board then called for a vote on the first motion.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval to reduce the amount for Orange County Global Medical Center, Inc. in the amount of \$300,000.

Motion carried, 6 - 0. One opposed – Ms. Bell.

Tab #35 – Orora Packaging Solutions

Mr. Griffin presented a proposal on behalf of Orora Packaging Solutions (OPS) in the amount of \$750,000. Headquartered in Buena Park, OPS is a nationwide manufacturing, distribution and logistics company. The company manufactures corrugated paper products, packing material, janitorial products, shipping supplies, and custom-built corrugated packaging and industrial packaging products.

This will be OPS's fourth ETP project, its third in the past 5 years. Twenty-three facilities will participate in this project: Rocklin, Fontana, Montebello (2), Fullerton (2), Brea, Alhambra, Union City, Paso Robles, Fresno, Salinas, Buena Park (2), San Marcos (2), Cypress, Irvine, Tracy, Fairfield, Camarillo, and Newark (2).

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

OPS has production staff that are represented by Teamsters District Council 2, Local 338M and Teamsters Local Union No. 63, both of which have expressed support for this proposal.

Mr. Griffin introduced Karen Merriman, Manager of Talent Development and Corporate Communications.

Mr. Broad mentioned that the applicant has a very impressive record. Mr. Broad then noted that the applicant has had multiple projects, 2 of which were at 100%, and the last 2 prior to that was 79%. Mr. Broad stated the foregoing was a very good jump; that the numbers demonstrate an accomplishment; and that the current proposal is a solid one.

Ms. Roberts stated that she thinks this is an ambitious project, but given the applicant's record and number of employees, Ms. Roberts doesn't think there's going to be a problem.

Ms. Roberts questioned about whether all of the employees are going to train on the new printer machine. Ms. Roberts also stated that when she looks at these contracts, and there's not a substantial contribution because there are so many facilities, and there are multiple contracts as a repeat contractor, then we probably need to take a closer look to make sure that ETP is not merely funding their training program indefinitely. Mr. Roberts said she is not going to suggest anything today, but it is something she thinks ETP should look at in the event the applicant comes back for another contract.

Ms. Merriman acknowledged the comments made by Ms. Roberts, and indicated that the applicant has put it \$1.5M of its own money.

Ms. Roberts said that's fine, but eventually the applicant will need to stand on its own. Ms. Roberts indicated that ETP cannot continue to fund half a million, or \$750K, or \$1M of the applicant's training program every year, or whenever they come back. Ms. Roberts indicated that her comments are a warning that in the future ETP may not continue its funding of the applicant's training program in the same way.

Ms. Merriman clarified that there are other machines being used for training, in addition to the new one noted as justification for coming back for more ETP funding.

Ms. Roberts restated her comments that the applicant has earned a lot of money from the State, and we just want to make sure that we can spread out our funds across the State.

Mr. Broad asked whether there are other comments.

ACTION: Ms. Bell moved and Mr. Tweini seconded approval for Orora Packaging Solutions in the amount of \$750,000.

Motion carried, 7 - 0.

Tab #36 – Stremicks Heritage Foods, LLC - THIS WAS MOVED TO THE CONSENT CALENDAR

Tab #37 – Waldorf Astoria Management, LLC

Mr. Griffin presented a proposal on behalf of Waldorf Astoria Management, LLC (Waldorf Astoria) in the amount of \$400,938. Waldorf Astoria is seeking ETP funding to train its workers at the La Quinta Resort. Located in La Quinta, the La Quinta Resort was founded in 1926. Its combined properties include 800 resort rooms, 9 golf courses, 21 tennis courts, 8 pickleball courts, a 23,000 square-foot spa, 41 swimming pools, 53 hot spas, 7 restaurants, and 189 spa villas. La Quinta Resort provides luxury room accommodations; resort golf courses; health and fitness centers; gourmet restaurants; boutique retail shops; and convention and conference resources to corporate businesses, tourists, and upscale worldwide leisure travelers. The La Quinta Resort property itself is owned by BRE Iconic LQR Owner, LLC (BRE); however, Waldorf Astoria is the resort employer and the ERP-eligible contract holder of the proposed Agreement.

Mr. Griffin introduced Stephanie Pagela, Director of Human Resources, and Will Sacks of National Training.

Ms. Newsom questioned why the reimbursement rate is significantly higher than the minimum wages paid to staff. Ms. Newsom indicated that the base wage that's listed ranges between \$11, and clearly upwards with a higher threshold, but then the reimbursement rate is \$15; so Ms. Newsom thinks this looks like the applicant is making money off of the training. Ms. Newsom inquired as to whether this is an issue that should be addressed in committee.

There was then discussion about how many persons start at minimum wage, and Ms. Pagela stated that she did not know the number, but that she could provide a definite number by next week, if that is something the Panel would like to see.

Ms. Newsom indicated that would be great, to see and acknowledge that fact.

Ms. Pagela stated that there were really very few because: there's only a few positions that start at minimum wage; they do annual reviews and performance based increases; and they've also been addressing compression, and increasing those who were previously at the old minimum wage.

Mr. Broad then asked for a clarification; since to actually see and acknowledge that fact would mean putting this application over for another month.

Ms. Roberts and Ms. Newsom both indicated that they were interested in putting this matter over for another month.

Mr. Broad stated for everyone to remember that the applicant is still paying the wages, and indicated that the issue is whether proportionally ETP is getting the same bang for its buck, paying \$15 an hour to train someone who earns \$11 an hour, or paying \$15 an hour to train somebody who's making \$25 an hour.

Ms. Roberts asked whether Bill Sacks knows how many employees out of the 1,000 are actually making the lower wages.

Mr. Sacks stated the number is going to be less than a 100 people, but we could remove those that are below a wage that you've established.

Mr. Broad asked whether the applicant is willing to amend the proposal right now in order to remove those low wage earners, and the applicant and Ms. Sacks indicated yes.

Mr. Broad then asked whether such a modification would satisfy the pending concerns, and Ms. Roberts and Ms. Newsom indicated yes.

Mr. Broad then asked whether there are any other comments or questions.

Mr. Tweini asked how long Ms. Pagela has been with the company, and whether there was ever any effort to unionize the workers.

Ms. Pagela responded by stating that she has been with the company for about one year, and that unions are not strong in the hospitality industry in the desert areas.

Ms. Roberts asked whether Ms. Pagela was working with the person that administered 100% of the program from last time.

Ms. Pagela stated yes. Additionally, Ms. Pagela stated that they have a Director of Training and Quality Assurance and a Training Coordinator, and that they continue to partnership with the National Training Center as well.

Mr. Board asked for any other questions.

Ms. Roberts made a motion to approve, with the amendment that the workers being paid the minimum wage are removed. Ms. Bell seconded the motion, but the exact language is not audible.

Mr. Broad acknowledged the motion and second to approve the project, with the amendment that workers being paid the state minimum wage are removed.

Mr. Griffin questioned whether the Panel is asking for a higher floor for those occupations in the chart, in terms of presentation purposes, or articulation of the range.

Mr. Broad stated that he thinks this means effectively yes, that they're going to remove from training those people who earn the state minimum wage. Mr. Broad then stated that we're going to be training people who earn above the state minimum wage.

Mr. Griffin then clarified that the Panel does not need to see this proposal back again with the amendment.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval for Waldorf Astoria Management, LLC. in the amount of \$400,938.

Motion carried, 7 - 0.

Tab #38 – Bell Brother’s Heating and Air, Inc.

Ms. Nastari presented a proposal on behalf of Bell Brother’s Heating and Air, Inc. (Bell Brother’s) in the amount of \$654,180. Founded in 1991 and headquartered in Mather, Bell Brother’s provides heating, ventilation, air conditioning (HVAC), plumbing installation, and repair, diagnostic services to residential homeowners or tenants. Training will be delivered at the company’s three locations in Sacramento and Stanislaus counties.

Ms. Nastari introduced Christine Udasco, Human Resource Director, Scott Bell, Training Director, and Jill Meeuwsen, Consultant.

Mr. Tweini commented by thanking the applicant for bringing up veterans, and said that’s something we need to continue to do.

Ms. Newsom pointed out that the veteran reimbursement rate is significantly higher at \$22/hr, but then noted that the proposal is to pay veterans on Job 5 significantly less than people in the same occupations under Job 1. Ms. Newsome then asked why the proposal is to pay the veterans less, but still get the higher reimbursement rate.

Ms. Meeuwsen responded by stating that the veterans are in a HUA Manteca facility; that they include job creation; and that Bell just implemented a wage increase so that the very lowest amount would be hired in the company would be \$14/hr now.

Mr. Broad then clarified that the \$11/hr shown in the proposal is now \$14/hr.

Mr. Broad asked for any other questions.

Ms. Roberts made a motion to approve, and Mr. Tweini seconded it.

ACTION: Ms. Roberts moved and Mr. Tweini seconded approval for Bell Brother’s Heating and Air, Inc. in the amount of \$654,180.

Motion carried, 7 - 0.

Multiple Employer Contracts

Tab # 39 – Joint Apprenticeship Committee for Operating Engineers for the 46 Northern Counties in California

Ms. Nastari presented a proposal on behalf of Joint Apprenticeship Committee for Operating Engineers for the 46 Northern Counties in California (Operating Engineers JAC) in the amount of \$948,200. Operating Engineers JAC is a joint labor management organization founded in 1969 to provide high-quality and up-to-date training in cranes, blades, dozers, track loaders, backhoes, excavators, and forklifts for apprentice, pre-apprentice and journey level operators. Apprentices work on a variety of infrastructure-related construction projects including roadways, dams, and bridges.

Currently, the main training center, located in Sloughhouse, consists of an eleven acre campus and serves 48 counties. An additional 80 acres are devoted to a training yard and maintenance area where hands-on training is conducted in a simulated lab environment. The Operating Engineers JAC currently represents over 693 apprentices in Northern California.

Ms. Nastari introduced Karie Sutter Executive Secretary, and Tammy Castillo, Director of Apprenticeship.

Mr. Broad asked about why there are so few women in the trades.

Ms. Castillo said, in regards to her trade, that they are increasing the percentage of females by 1%, and she thinks it's all in the recruitment and team that you have to recruit for you. Ms. Castillo indicate that her group has female coordinators and female instructors, and Ms. Castillo thinks that makes a big difference in recruitment efforts. Ms. Castillo then described a trade fare in Oregon, where over 1,700 women attended. There were roofers, ironworkers, and persons actually climbing the high beams. The firewomen were also there teaching the persons how to hold the hoses. Ms. Castillo thinks it's all in the presentation of the programs.

Ms. Roberts asked about the turnover rate for women.

Ms. Castillo said that they have a very low turnover rate for female apprentices, but also indicated that child care is a problem.

Mr. Broad then asked for any other questions.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval for Joint Apprenticeship Committee for Operating Engineers for the 46 Northern Counties in California in the amount of \$948,200.

Motion carried, 7 - 0.

Amendments

Tab #40 – Greater San Fernando Chamber of Commerce

Mr. Griffin presented an amended proposal on behalf of Greater San Fernando Chamber of Commerce (Greater San Fernando Chamber) in the amount of \$355,118. Founded in 1911 and located in Van Nuys, Greater San Fernando Chamber is a nonprofit membership organization whose mission is to create and foster a sustainable business environment in the San Fernando Valley region through networking opportunities, advocacy, promotion, and community projects. Greater San Fernando Chamber partners with other chambers within Los Angeles County, including Valley Industry & Commerce Association and The Valley Economic Alliance. These partnerships help identify the needs of manufacturers and connect employers to the tools needed to help them become more successful. Many of these companies need training to upgrade the skills of their workforce and to help them grow and stay competitive in California.

Phase II funds will accommodate employees of newly recruited participating employers. These employees had requested ETP-funded training; however, all funds in Phase I are already committed. Phase II funds will train an additional 278 incumbent workers in new Jo Numbers 5, 6, and 7. This will increase the estimated number of trainees from 282 to 560 and the Agreement amount from \$187,176 to \$355,118. Employers from Santa Barbara and San Bernardino Counties will also be served.

Mr. Griffin introduced Nancy Hoffman Vanyek, CEO.

No questions from the Panel Members.

ACTION: Ms. Roberts moved and Mr. Tweini seconded approval for Greater San Fernando Valley Chamber of Commerce in the amount of \$355,118.

Motion carried, 7 - 0.

Tab #41 – Intuitive Surgical, Inc.

Ms. Nastari presented an amended proposal on behalf of Intuitive Surgical, Inc. (ISI) in the amount of \$477,176. Founded in 1995 and headquartered in Sunnyvale, ISI, with its affiliate, Intuitive Surgical Operations, Inc. (ISOI) manufactures surgical robots used across cardiac, urology, gynecologic, colorectal, pediatric and general surgical disciplines. ISI is the parent company that focuses on sales/marketing, and its subsidiary, ISOI focuses on manufacturing. ETP-funded training will be delivered to both ISI and ISOI employees under this Agreement.

Ms. Nastari introduced Megan Gage, Manager, Employee Development; and Michelle Rychener, Vice President TRS from TFP.

There were no questions from the Panel Members.

ACTION: Ms. Roberts moved and Mr. Tweini seconded approval for Intuitive Surgical, Inc., in the amount of \$477,176.

Motion carried, 7 - 0.

Tab #42 – The Cheesecake Factory Bakery

Mr. Griffin presented an amended proposal on behalf of The Cheesecake Factory Bakery (CFB) in the amount of \$504,000. CFB is a food producer specializing in cheesecakes, cakes, and assorted desserts that are distributed to restaurants, club stores, food distributors, retail stores, and the military. CFB now has over 200 restaurants around the world and two baking facilities in Calabasas Hills and North Carolina. The current Agreement is for training at the baking facility in Calabasas Hills. At the December 2017 Panel Meeting, the initial proposal of \$504,000 was reduced by 50% with the understanding that the CFB could return for the remaining funds once performance warranted additional funding.

Mr. Griffin introduced Michelle Manchez, Training Director, and Richard Lopez, Sr., Director of Human Resources, and Maria Montec.

Ms. Newsom inquired, since the applicant was here last time, about whether there is a new cap for the healthcare benefits that are applied to make the post retention ETP wage. Ms. Newsom stated that we need clarification from staff as to whether or not the \$250K cap would be applicable to the remaining amount or not.

Mr. Griffin said it would be applicable since this is new funding.

Ms. Newsom indicated this was good news because then everyone will be getting wage increases maybe.

Ms. Roberts then asked about how many of 350 employees will be making \$11/hr.

Ms. Manchez indicated that the number was about 20%, maybe 25%, as some them are newer staff.

Ms. Roberts asked whether those employees, which is about 20%, could be taken out of the equation in order to be consistent with how ETP has managed lower wage earners in the past.

Mr. Griffin responded by stating that this item is actually part of the Phase I funding, so it goes back to the original term of the contract, so the benefit amount shown in the previous proposal applies in this case. This is not a Phase II, it's a Phase I, which goes back to the beginning of the term.

Mr. Broad stated that ETP cannot impose retroactive new conditions, and there's also a question about only paying above the state minimum wage; which is fine, but this needs to be applied across the board, so Mr. Broad thinks that the Panel needs to think about what it's going to do, and have a discussion about it as a policy.

Mr. Knox indicated that Elisabeth Testa will be conducting a presentation at committee regarding wages and HUAs. Mr. Knox noted that one of the recommendations for the committee in the future will be essentially around this issue, which is whether there should be a policy that all wages must be higher than the state minimum wage. Mr. Knox thinks this is a policy decision, but that the Panel has every right to do it.

Mr. Broad stated that in regards to the current proposal that these employees are manufacturing employees, so manufacturing employees typically have a higher wage than service industry employees, but a significant number of these employees do not. Mr. Broad thinks these issues that are being raised by fellow Panel Members are fair ones, and he asks whether someone is making a motion to exclude those low wage earners as we did earlier.

There was then a discussion about whether the those employees making the state minimum wage could be excluded, since the project is at Phase I. Mr. Griffin indicated that if they are already enrolled and in the training, and they meet the wage and the benefits, then they would be entitled to be included, although he's not sure.

Mr. Knox said it's standardized, and he wonders whether there are enough employees within this contract to meet the additional \$252K. There was some discussion about the numbers, but Mr. Griffin ultimately stated that he would need to run those numbers to see.

Ms. Roberts asked whether the Panel could just cut the current funding by 20%, and whether that would work.

Mr. Knox said that would make it easier.

Mr. Broad said he thinks that carving them out would be the way to do it.

Mr. Knox restated that it's just by 20%.

Mr. Broad asked for a motion.

Ms. Newsom moved to approve with an amendment to reduce the funding by 20%.

Mr. Broad acknowledged the motion to approve this funding reduction of 20% of the new allocation and what we are not funding is people who earn minimum wage.

ACTION: Ms. Newsom moved and Ms. Roberts seconded approval for The Cheesecake Factory Bakery in the amount of \$504,000.

Motion carried, 7 - 0.

XI. PRESENTATION BY LIS TESTA

Ms. Testa stated that she has a quick presentation today, mostly to bring the Panel updates about the topics being discussed in committee. There are five topics: OSHA 10/30; Out-of-State Vendor and Out-of-State Training; Broker Model; Wages and Regions; and Non-Traditional Apprenticeships.

As for OSHA 10/30: Historically we have required employers to complete the full 10 hours of OSHA 10, and the full 30 hours of OSHA 30, if they were including such persons in their contract. However, this is sometimes problematic because many companies start training before their contract term starts, and they start that OSHA 10/30 hours ahead of time, so then they don't have the full 10 or 30 hours, but we want them to still be able to include those hours onto their contract. Accordingly, we made a clarification notice toward the end of April that became effective on April 24 that if they're doing OSHA 10/30, then they don't have to do the full 10 hours for OSHA 10 and the full 30 hours for OSHA 30. This is more of just a heads up or notification for the Panel. It was something we could do administratively and didn't require any major rule changes.

As for Out-of-State Vendor and Out-of-State Training: If you remember at our first subcommittee meeting last December, this was an issue that a lot of the stakeholders brought up and it was kind of an eye opener for us because it was not on our radar as something that was a source of frustration. As such, Ms. Testa indicates that staff has been working on this issue, and have made a few changes. The changes are not effective yet because we still need to wait for the ETMS program changes to take place, which should hopefully happen in the next few weeks. However, in response to the stakeholders raising this issue, we are going to change the following policy changes: If a company is using an out-of-state vendor, they no longer have to fill out a form and they don't have to provide any

justifications, they just have to identify who the out-of-state vendor is on the 100D form and that 100D form is the form that they identify all their subcontractors on so that's a place where they put the vendor already anyway. For out-of-state training, we simplified the form a lot. They do still need to give us a little bit more justification for that because we want to know why they are sending so many trainees outside of California, but we really simplified the form. We took a lot of the questions out and combined some other questions and we simplified the approval process for that. So once those changes happen hopefully it will ease a little bit of stress and aggravation. It hasn't happened yet, but it's coming very soon.

As for the Broker Model: This was last discussed at subcommittee in March and subcommittee had actually voted to bring the Broker Model concept to Panel for a vote to remove it this month. However, staff has some additional concerns about it so we didn't put it on the agenda for this panel meeting. We would like to bring it back to subcommittee in June. The main concern that staff has is that if we remove the Broker Model as it is right now, there is nothing to take its place. So the original issues that the Broker Model was addressing would still exist. There would not be anything to address them unless we have a replacement. So we are going to bring this back to committee in June for further discussion.

As for Wages: Wages seem to be a hot topic for today. I would like to say that all of the concerns people brought up about wages today I did note down so we can include those concerns in the discussion at committee. The problem with wages is that if you look at our legislation and regulations, it comes up in a lot of places and they are tied together. We need to really look at what the legislation and regulations are requiring of us so that we can figure out how to work within that to then change the wage structure, because we can actually change the regulations themselves.

Mr. Morales asked whether there is a way to streamline the process in regards to the minimum wage, since this is apparently a reoccurring issue.

Ms. Testa responded by stating yes, and indicated that staff is looking at that now, since the wage chart is extremely complicated, due to our legislation and regulations. Ms. Testa went on to describe the wage chart, and how ETP ends up with almost 100 regions within the state, and every region ends up with their own wage if they are a high end employment area.

Mr. Broad said, for basic understanding and clarification, that the legislature intended ETP to fund higher wage jobs, so it created an ETP minimum wage, which is generally higher than the State minimum wage. Therefore, if the legislature intended to set the minimum wage at the State minimum wage, then they could have done so; but they didn't, and they actually require us to fund at an ETP minimum wage or above or on a case by case basis with a request from an employer to reduce it. Over time, Mr. Broad explains that the ETP minimum wage has risen faster than a lot of other wages. In other words, we have a lower wage base economy in California than we had when ETP started, so we get a lot of employers in here who are not even close to the ETP minimum wage. It doesn't mean they are not competitive in the labor market, it's just a sad fact regarding the amount of low wage work that actually exists in California. It repeatedly tests the basic premise at ETP, that the legislature intended us to be funding high wage, high income potential type of jobs so that the tax payers get a big bang for their buck. Mr. Broad indicated that this is an issue the Panel is constantly struggling with, and Mr. Broad is aware that is constantly comes up at Panel Meetings.

Mr. Morales suggested for reporting purposes, since the Panel continues to ask how much of the percentage of those employees that will need training are at the lower minimum wage, that indication of the percentage might be helpful as part of the rule.

Mr. Broad agreed that's what we're seeing, although Mr. Broad explained that there are other issues related to recordkeeping and reporting too, since the employer doesn't necessarily know which exact employees are going to get the training done in time. Mr. Broad stated that all of these issues have been a source of confusion.

As for Non-Traditional Apprenticeships: Ms. Testa stated that we have been talking a little bit about this issue at committee, and committee has requested that we consider options, such as are we going to start a new pilot program, or include non-traditional apprenticeships with the existing apprenticeship pilot program. We're also looking at wage progression, and those kinds of items. Additionally, there are also a few different ways to look at the non-traditional apprenticeship programs, such as having the local educational agency hold the contract instead of the actual apprenticeship program itself. In other words, there are a few different ways that we can handle these issues, and we're currently looking at them in order to bring up at a future committee meeting.

Mr. Broad asked for any questions.

Ms. Roberts asked, in regards to non-traditional apprenticeship programs, whether we have a list of employers in California that might be interested in this program.

Ms. Testa responded by stating that Peter Cooper works closely with all of the apprenticeship programs and DAS, so he would probably know more about what kind of alternative apprenticeship programs there are or that they are thinking of developing. Ms. Testa said I know a lot of them are in transportation and there are a couple of computers ones, so I would assume there is a fair number of companies that would be interested, if they knew it was available.

Mr. Broad thanked Ms. Testa for the presentation, and asked whether there is any public comment. Seeing none, the meeting was adjourned.

XII. PUBLIC COMMENT

No public comments.

XIII. MEETING ADJOURNMENT

Meeting adjourned at 12:05 p.m.

Attachments: Presentation Memorandum by Stewart Knox
Understanding More About ETP Apprenticeship Contracts by Kelly Greer
ETP's Update & Reviews of Potential Program Revisions by Lis Testa



Memorandum

To: Panel Members Date: May 24, 2018

From: Stewart Knox, Executive Director File:

Subject: Action Items: Priority Industries, Funding Allocations & Encumbrance Level, Funding Caps, Reimbursement Rates, Repeat Contractor Rule

Item #1: Action on Priority Industries

ETP staff recommends keeping the current ETP Priority Industry List unchanged.

Priority Industries as follows:

- Allied Healthcare
- Agriculture
- Biotechnology/Life Sciences
- Construction
- Goods Movement & Transportation/Logistics
- Green/Clean Technology
- Information Technology Services
- Manufacturing/Food Production
- Multi-Media/Entertainment
- Technical Services.

Item #2: Action on Funding Allocations & Encumbrance Level

ETP staff recommends the following funding allocations and encumbrance level:

- Single Employer: \$48,000,000
- MECs: \$24,000,000
- Small Business: \$6,000,000
- Critical Proposals: \$5,000,000
- Apprenticeship/non-traditional: \$20,000,000
- Total: \$103,000,000
- Encumbrance Level: move from 38% to 40%

Item #3: Action on Funding Caps

ETP staff recommends the following Funding Caps:

Contractor Category	Current FY 17/18 Caps	Proposed FY 18/19 Caps
MECs (Includes Apprenticeships)	\$950 K (w/ Apprenticeships at \$450 K per sponsor)	\$950 K/\$1.8 M*
Single Employers (Includes Small Business)	\$750 K (w/ Small Business at \$50 K)	\$900 K
Critical Proposals	\$900 K	\$900 K
Delegation Orders	\$50 K	\$75 K

* MECs over \$950 K need to wait 18 months from start of contract term before submitting new Pre-App

Item #4: Action on Reimbursement Rates

ETP staff proposes a new Fixed-Fee Reimbursement Rate Table, in order to simplify our existing rate structure and to provide most training and trainee categories with a raise in reimbursement rates. See rate table below:

The new rates will become effective for all projects (and new amendments) with a term start date/effective date of 7/1/18 or later.

Rate Category	Reimbursement Rate
CBT	\$9
Apprenticeship (pre-apprentices & apprentices)	\$21
Non-Priority Retraimees	\$23
Special Populations: i.e.: Priority Projects, Critical Proposals, New Hires, RJC, Small Business, Veterans, Advanced Technology, MEC Entrepreneurial, Journeymen, Alternately Funded Projects, Ex-offender/At-Risk Youth, CNA to LVN, Medical Skills (both types)	\$26

Item #5: Action on new Repeat Contractor Rule

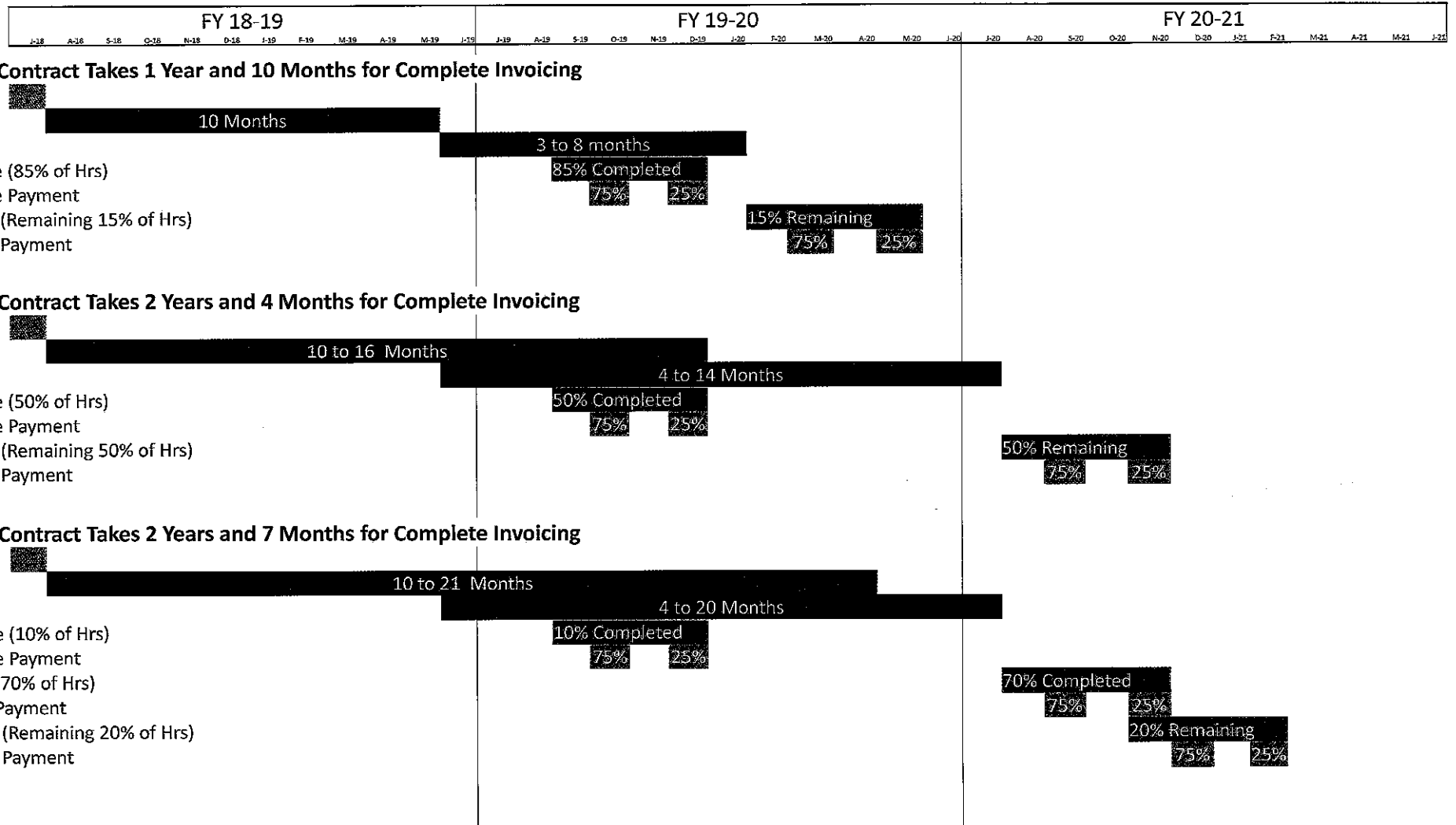
ETP staff recommends adoption of a new Repeat Contractor Rule, effective 7/1/18, as follows:

- Enact as a Pilot Program
- Impose a time limit as follows:

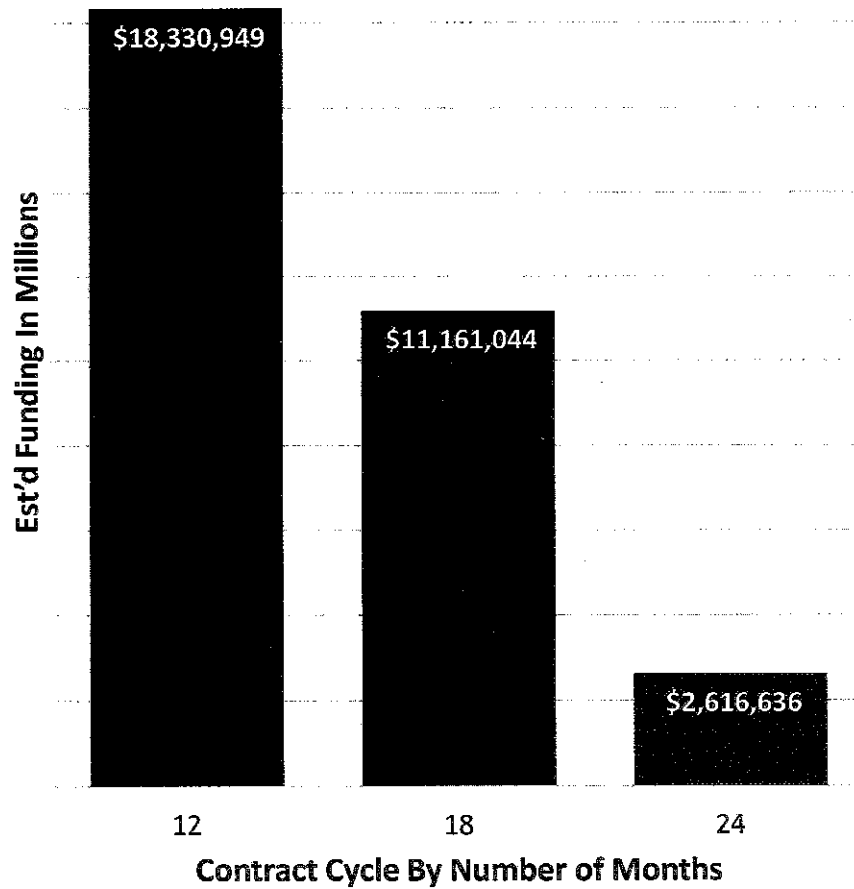
- Contractors may have a first, and then a second contract with no waiting period.
- After the ending contract term date of the second contract, contractors must wait 9 months before submitting a Preliminary Application for a 3rd contract.
- Both 1st & 2nd contract must reach at least a 75% completion rate before a new Pre-App for a 3rd contract will be accepted.
 - o If either the 1st or 2nd contract do not meet the 75% threshold, they will be right-sized accordingly
- Clock resets with the start of the 3rd contract.
- A contractor may earn a maximum of \$2.5 M over the course of four (4) contracts.
- Critical Proposals, Alternately Funded Projects, Small Business Projects, and all MECs (including JATCs) are exempt from the Repeat Contractor Rule
 - o Since MECs are exempt, they must have at least four (4) Participating Employers on their contract.
 - o Anyone desiring an exemption from the Repeat Contractor Rule may request an exemption with ETP Executive Staff.

Understanding More About ETP Apprenticeship Contracts

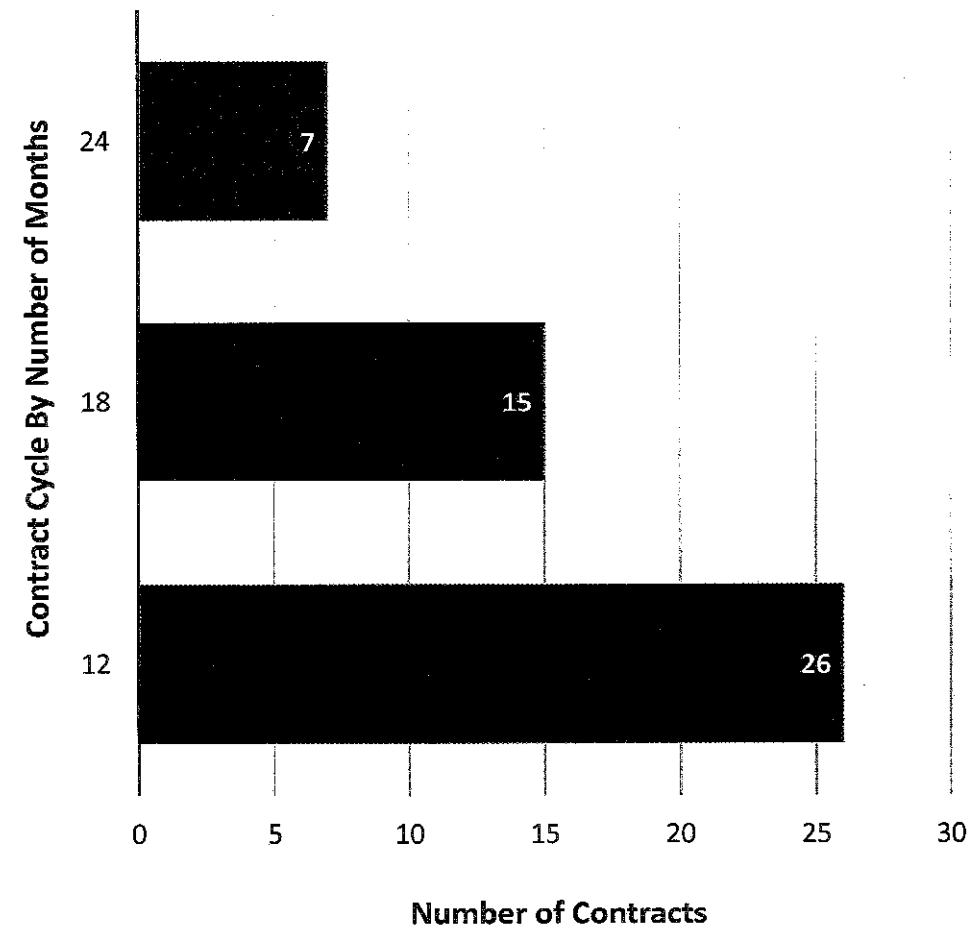
ETP Apprenticeship Funding Cash Flow Map



FY 18-19 Est'd Apprentice Funding by Month Cycle Size

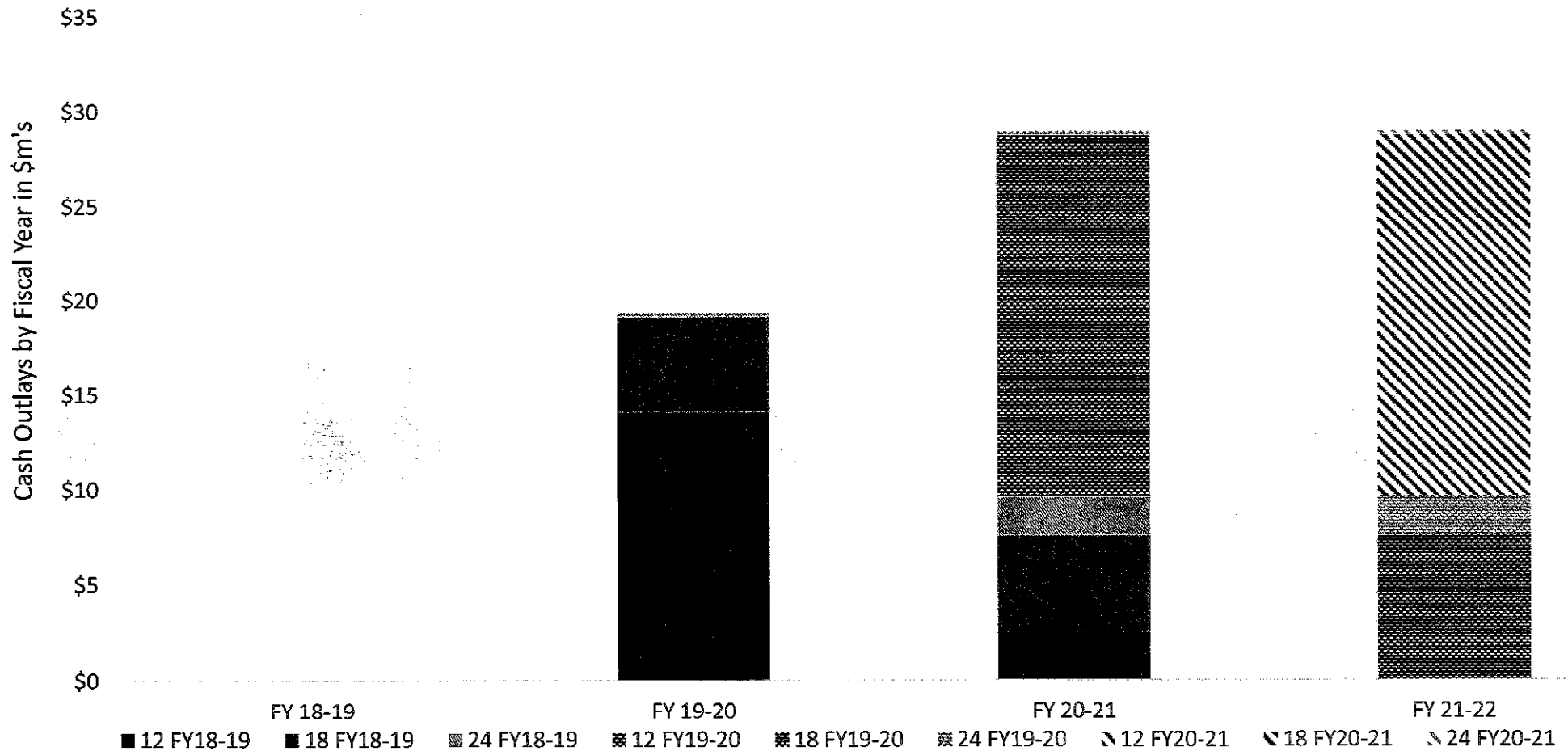


Est'd Number of ETP FY 18-19 Apprenticeship Contracts



Cash Flow Outlook Starting in FY 18 - 19

Assuming a 90% Completion Rate and \$950K Cap



What Would Happen Should a Recession Hit in FY 20 -21

#1 Longer Contract Cycles

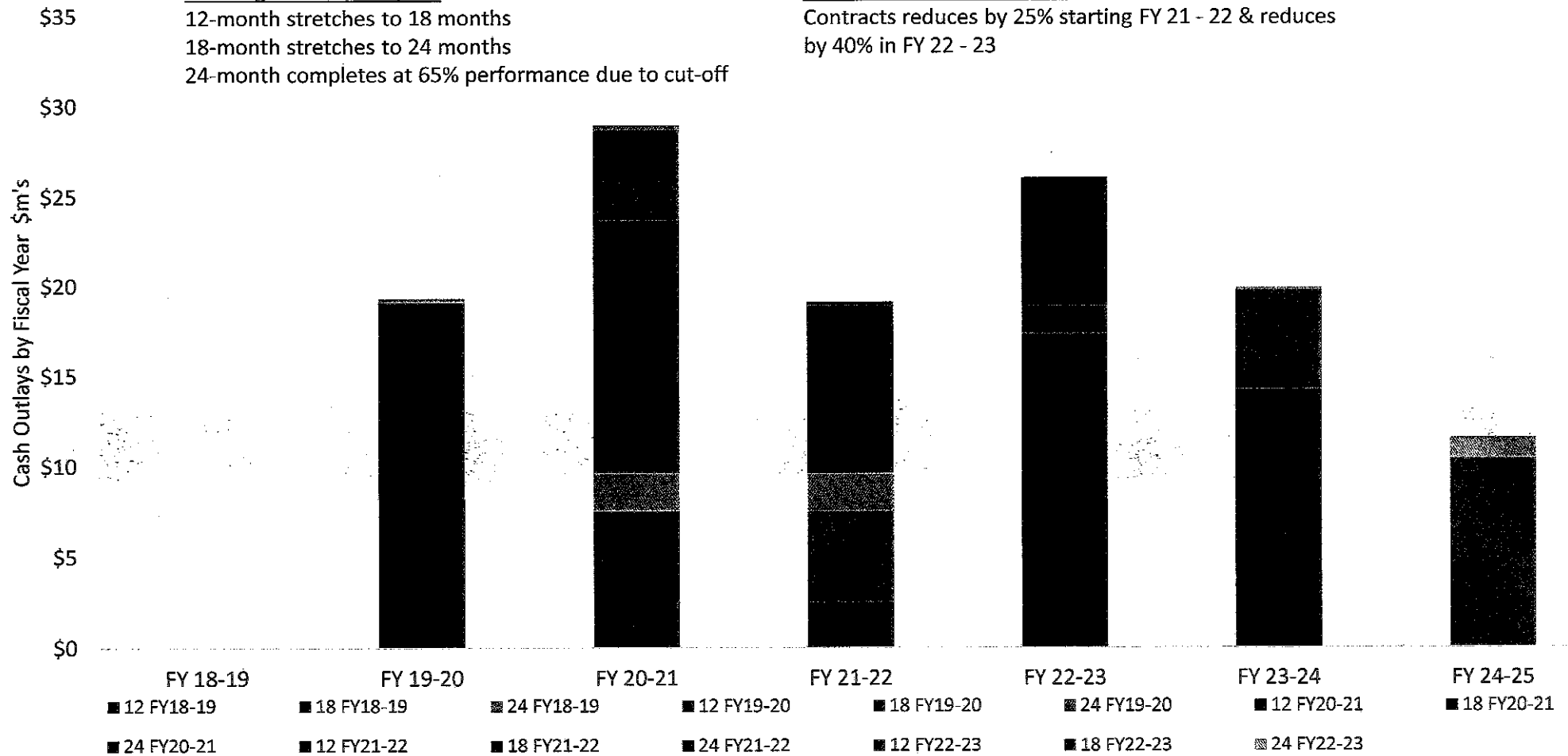
12-month stretches to 18 months

18-month stretches to 24 months

24-month completes at 65% performance due to cut-off

#2 Less Funds Needed Because of Fewer Entering Apprentices

Contracts reduces by 25% starting FY 21 - 22 & reduces by 40% in FY 22 - 23



Employment Training Panel



ETP Panel Meeting

Updates and Previews of Potential Program Revisions

Lis Testa, RPS I

May 24, 2018

May Panel Presentation Topics

- ▶ OSHA 10/30
- ▶ Out-of-State Vendor/Out-of-State Training
- ▶ ETP's Broker Model
- ▶ Wages & Regions
- ▶ Non-Traditional Apprenticeships

OSHA 10/30 Adjustment

- ▶ Historically, if a contractor was offering OSHA 10 or OSHA 30 training as part of their curriculum, their trainees were required to complete the entire 10 or 30 hours of training of the OSHA 10/30 program, as applicable.
- ▶ This has proven problematic for those contractors who only need to offer part of the OSHA 10/30 curriculum. Also, some contractors start and pay for their OSHA 10/30 training before contract execution, and would like to include the remaining portions of the training during their contract.
- ▶ Therefore, effective 4/24/18, OSHA 10/30 training may be included on an ETP contract even if less than the full 10 or 30 hours of training are offered, respectively.

Out-of-State Vendor/Out-of-State Training

- ▶ At the December, 2017 Subcommittee Meeting, Stakeholders brought concerns over the complexity of the Out-of-State Vendor (OSV) and Out-of-State Training (OST) forms.
- ▶ In response, ETP will be streamlining the OSV and OST forms as follows:
 - ▶ No OSV form will no longer be required. The OSV must be identified with all other vendors on the 100D form, and should be included in the Proposal Narrative (130).
 - ▶ The OST form has been greatly simplified, as has the review and approval process.
- ▶ These changes will become effective once the changes have been programmed in ETMS. Clarification notices and new forms will be forwarded to staff at that time.

ETP's Broker Model

- ▶ At the March, 2018 Subcommittee Meeting, there was discussion around ETP's Broker Model
- ▶ Although the Subcommittee moved to bring the removal of the Broker Model to Panel this month (May, 2018), staff has some additional concerns that they would like the subcommittee to consider before bringing this issue for a full vote to Panel.
- ▶ The main concern is that, if the Broker Model is removed, we have nothing to take it's place.
 - ▶ That is , that the initial problem statement addressed by the Broker Model remains.
- ▶ Staff would like further discussion on an alternative to the Broker Model with the Subcommittee, so that a new alternative can be enacted at the same time that the Broker Model is removed.
- ▶ This topic will be on the June, 2018 Subcommittee Agenda.

Wages & Regions

- ▶ Last year, at fall Panel meetings and at the December, 2017 Subcommittee meeting, we began the process of finding a way to simplify our wage charts.
- ▶ We will be continuing this work, beginning with the June, 2018 Subcommittee meeting, where you will receive a more detailed background into this topic.
- ▶ As a reminder, the wage chart is complicated, because of how it is tied to regions, especially High Unemployment Areas.
- ▶ There are multiple passages in the Legislation and Regulations that address both wages and regions.
- ▶ The goal will be to simplify the wage chart, which may involve changing the way we determine regions.

Non-Traditional Apprenticeships (1)

- ▶ The Subcommittee received information at the March, 2018 Subcommittee meeting on some new, non-traditional apprenticeships that DAS is developing currently.
- ▶ Staff is looking towards developing a non-traditional apprenticeship pilot to address these new programs.
- ▶ This item will also be on the June, 2018 Subcommittee agenda.

Thank you

► Any questions?

Single Employer Contractor

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

- Unless funded under Special Employment Training (SET), a single employer must face out-of-state competition.
- A single employer must be subject to the Employment Training Tax.
- The employer must also make an “in kind” contribution toward the cost of training, as follows: 1) 100 or fewer employees, at least 50% of the ETP-funded amount; 2) more than 100 employees, at least 100% of the ETP-funded amount.
- The employer must provide union letters of support for employees who are represented. The employer should also be able to show how the training will enhance job security and improve opportunities for advancement.
- A single employer must establish the need for the particular training curriculum proposed.
- The employer must establish its ongoing commitment to training and represent that ETP funds will not displace existing resources.
- All single employer contracts are capped at \$900,000.

These features apply to core program funding.

Multiple Employer Contractor

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

- Up to 8% of program costs may be approved as additional funding for recruitment, placement and assessment activities. For New Hire training, the MEC may receive up to another 4% (total 12%). These costs must be justified.
- The project may be retraining or new hire training, or a combination of both. Training may take place at the worksite or a training center, or both.
- All MECs are capped at \$950,00/\$1.8M*

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

Retraining

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

New Hire Training

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

These features apply to core program funding.

Delegation Order Process

- The Panel has delegated authority to the Executive Director, without consultation with the Panel Chair, to approve (1) small business (100 or fewer employees) for \$75,000 or less, and (2) single proposals for \$75,000 or less.
- This procedure allows projects to be approved on a flow basis. This process recognizes the need for just-in-time training, and reduces or eliminates the need for a Consent Calendar.
- An ETP130 and Curriculum is prepared for each proposal. They are reviewed and approved after the Executive Director signs off. The effective date will be the date specified by the Field Analyst and if no date is specified, the earliest effective date of contract is the day after the project is approved by the Executive Director.
- A copy of approved Delegation Orders is included in each month's Panel Packet, for projects approved prior to the Panel meeting, as an information item.



Employment Training Panel: 2018-2019 Strategic Plan

June 22, 2018

Lis Testa, RPS I

New Design for the Strategic Plan

- ETP has updated the design, layout, and contents of the Strategic Plan this year.
- Added more images, graphs, and charts to make some information more visually available.
- Streamlined the contents of the Plan to fit the requirements in our Legislation, removing some un-necessary or duplicative information.
- End result looks beautiful, is updated and modern, is more concise, and presents data in a more user-friendly way.
- A big thank you to the staff of our Planning & Research, Data Analytics, and Website Monitoring & Metrics units!





2018-2019 ETP Strategic Plan: Contents:

- A: Vision & Mission Statements
- B: Introduction/Overview
- C: Goals & Objectives
- D: Improvements & Funding
- E: Priority Industries
- F: Labor Force Priority Populations
- G: Key Strategies, Initiatives, and Partnerships
- Appendices:
 - Priority Industry Descriptions
 - Alternative & Renewable Fuel & Vehicle Technology Program (ARFVTP)



A: Vision & Mission Statements – pg. 1

- **Vision:** The Employment Training Panel (ETP) will support economic development in California through strategic partnerships with business, labor, and government.
- **Mission Statements:** The 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.



B: Introduction/Overview – pg. 2

➤ **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



C: Goals & Objectives – pp. 3 - 4

- 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 Retrainee-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.



D: Improvements & Funding – pp. 5 - 8 (1)

- 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 our program.
 - Completed Items: Formation of the Committee, Delegation Order Review, Funding Priorities, Application of Health Benefits, Fixed-Fee Reimbursement Rates, Repeat Contractor Rule, Osha 10/30 Review, Out-of-State Vendor/Training Simplifications
 - In Progress Items: Wages, Regions, Non-Traditional Apprenticeships, Comprehensive Review of Legislation/Regulations, Review of Pilots/Guidelines



D: Administrative Strategies (2)

➤ 2) Funding Caps:

Contractor Category	FY 18/19 Caps
MECs (Includes Apprenticeships)	\$950,000/\$1.8 Million*
Single Employers (Includes Small Business)	\$900,000
Critical Proposals	\$900,000
Delegation Order	\$75,000

- * MECs over \$950,000 must wait 18 months from the start of their contract term before submitting a second preliminary application.



D: Administrative Strategies (3)

➤ 3) Funding Allocations:

Project Type	Allocations
MECs	\$24,000,000
Single Employers	\$48,000,000
Small Business	\$6,000,000
Critical Proposals	\$5,000,000
Apprenticeship/Non Traditional	\$20,000,000
Total:	\$103,000,000



D: Administrative Strategies (4)

➤ 4) Lowest Funding Priorities:

- Commission sales in the retail trade, multi-level marketing, training for employees of training agencies, adult entertainment, gambling, mortgage banking, car dealerships, truck driving schools, and partners in professional firms

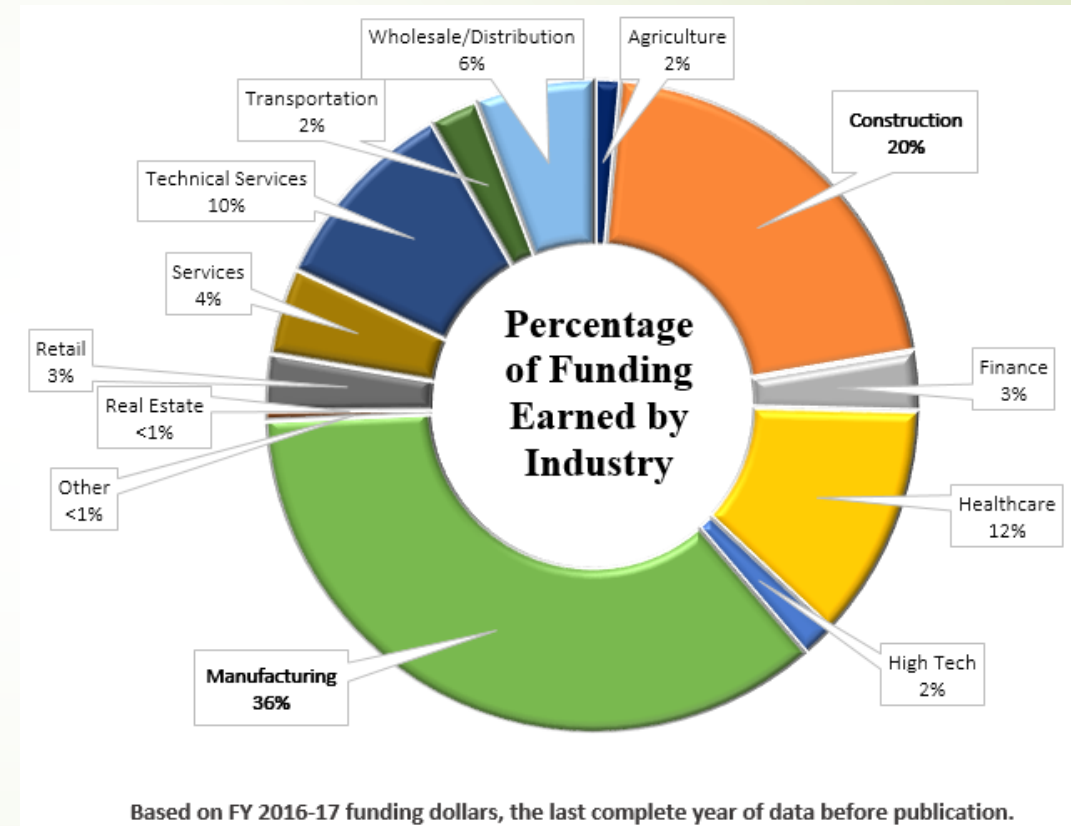
➤ 5) Other Limitations:

- 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 – pg. 9

- 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 – pp. 10 - 12

- Briefly describes eight (8) labor force populations that are given ETP priority:
 - Critical Proposals
 - New Hires & Retrainee-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 – pp. 13 - 16

- 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 \$73 Million 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 of ETP's Priority Industries
- Appendix B: Describes one of ETP's alternative funding sources and programs – the Alternative & Renewable Fuel & Vehicle Technology Program.



Proposed Action:

- Staff recommends Panel approval of the ETP 2018-19 Strategic Plan, with the direction to staff to incorporate any desired changes, and with the delegation of authority to the Executive Director for final approval, prior to submitting the final Strategic Plan to both the Administration and Legislature.
- Any questions?
- Thank you for your time!





Training Proposal for:
Applus RTD USA, Inc.
Agreement Number: ET19-0132

Approval Date: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

PROJECT PROFILE

Contract Attributes:	Retrainee SET HUA Priority Rate	Industry Sector(s):	Services Hi-Tech Construction Aerospace Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Kern	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 224	U.S.: 596	Worldwide: 20,000	
<u>Turnover Rate:</u>	10%			
<u>Managers/Supervisors:</u> (% of total trainees)	N/A			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$144,300		\$0	\$0		\$144,300

In-Kind Contribution:	100% of Total ETP Funding Required	\$129,565
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET HUA Priority Rate	Comm'l. Skills, Computer Skills, Cont. Imp., Business Skills, HazMat, OSHA 10/30, PL-Comm'l Skills	185	8-200	0	\$780	*\$12.53
				Weighted Avg: 30			

*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: SET/HUA: \$12.53 per hour for Kern 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 \$1.50 per hour may be used to meet the Post-Retention Wage

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Technician		69
Assistant Technician		49
Inspector		21
Field/Office Support Staff		17
Administrative Staff		17
Frontline Supervisor		12

INTRODUCTION

Founded in 1930, Applus RTD USA, Inc. (Applus) (www.applus.com) provides testing, inspection, certification, and solutions to companies in construction, oil & gas, power, automotive, industrial, and telecommunications sectors to ensure that assets and products comply with health and safety, quality, and environmental standards and regulations. Customers include Underground Construction, Ortega Construction, Crosno Construction, SpaceX, Simplot Grower Solutions, Phillips 66, Chevron, Paso Robles Tank, KB Homes, Taft Manufacturing, Airgas, TransCanada Pipelines, Shell Pipeline and Southern California Gas Company.

The Company is a division of the Applus Group of Companies and a subsidiary of Libertytown USA 3, Inc., which has numerous divisions globally. In California, Applus has three locations: Bakersfield, Ventura and Westminster. The proposed training is for employees at the Bakersfield location only.

PROJECT DETAILS

This will be Applus' second ETP Agreement and the second in the last five years. In its prior ETP Agreement, Applus focused on advancing employee skills to meet customer demands and requirements. Training provided some trainees the certifications needed for the company to remain competitive in the industry.

Training in this new proposal will enable more trainees to attain certification and the Company to remain competitive. Customers are demanding a Lean and efficient method of collecting high quality data and testing. Some courses in this proposal are repeated from the prior Agreement; however, there will be no repeat trainees in those courses.

Training Plan

Commercial Skills: Training will be offered to Technicians, Assistant Technicians, Inspectors, Field Support Staff and Frontline Supervisor. Training will focus on Non-Destructive Training methods and techniques, equipment and operation processes.

Continuous Improvement: Training will be offered to all occupations in project management, total quality management and leadership skills. Training will provide trainees the skills needed to improve productivity, quality and overall work environment.

Business Skills: Training will be offered to all occupations focusing on customer service, conflict resolution and interpersonal skills.

Computer Skills: Training will be offered to Field/Office Support Staff and Frontline Supervisors in the automation of company functions and Advanced/Intermediate MS Office.

Hazardous Materials: Training will be offered to Assistant Technicians, Technicians, Inspectors and Frontline Supervisors on safe handling of hazardous materials.

OSHA 10/30

OSHA 10/30 is a series of courses "bundled" by industry sector and occupation. It consists of 10 hours of training for Assistant Technicians, Technicians and Inspectors; and 30 hours for Frontline Supervisors. The coursework must be approved by, and the instructors must be certified by Cal-OSHA.

Productive Laboratory (PL) – Commercial Skills

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

PL in Commercial Skills will be offered to Assistant Technicians, Technicians, and Inspector in Set Up and Job Preparation, Equipment Operation and Non-Destructive Testing. PL will be delivered with a trainer-to-trainee ratio of 1:1. Training will be provided by in-house staff and subject-matter experts.

Trainees will receive a combination of Class/lab and 40 PL training hours. Each PL session is structured with specific skills that trainees must learn. Trainees are evaluated on knowledge, skill, and proficiency. After the successful completion of a PL training course, the trainer will certify competency for each skill before trainees are allowed to work independently.

Special Employment Training

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

➤ Wage Modification

All trainees work in Bakersfield (Kern County), a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. HUA trainees qualify for the ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may also modify the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. Applus is requesting a wage modification from \$16.70 to \$12.53.

Frontline Worker

Applus will include 12 Frontline Supervisors in this training proposal. These supervisors are frontline workers, non-exempt from overtime, and spend more than 50% of their time performing frontline work duties. Trainees meet the Panel's definition of frontline workers, qualifying for SET funding.

Commitment to Training

The Company's current annual training budget is approximately \$480,000 which includes customer-specific training such as environmental, California Oil Producers, Passport, Smith driving, CAL-OSHA and voluntary career advancement training. The CAL-OSHA is a State-mandated training different from the OSHA 10/30 in the proposed training plan. 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 Regional Human Resources Supervisor will oversee this ETP project. This staff member is knowledgeable of the ETP program, having administered its prior ETP contract. Training will be delivered by in-house experts.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0206	\$149,688	08/29/16 – 08/28/18	183	53	18

Based on ETP Systems, 7,545 reimbursable hours have been tracked for potential earnings of 91% of approved amount. The Contractor projects final earnings of 100% based on training in progress through 5/30/18.

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:

COMMERCIAL SKILLS

- Acoustic Emission
- Electromagnetic Testing
- Ground Penetrating Radar
- Guided Wave
- Laser Methods
- Leak Testing
- Magnetic Flux Leakage
- Magnetic Particle Testing
- Penetrant Testing
- Radiological Testing
- Thermal/Infrared Testing
- Ultrasonic Testing
- Vibration Analysis
- Visual Testing
- 3D Scanning

BUSINESS SKILLS

- Customer Service

CONTINUOUS IMPROVEMENT

- Process Improvement
- Leadership
- Six Sigma
- Project Management

COMPUTER SKILLS

- Business Operations Software
- MS Word, Excel, PowerPoint (Advanced/Intermediate)

HAZARDOUS MATERIALS

- Hazardous Materials Handling
- Hazardous Waste
- Hazardous Monitoring/Clean-Up

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

Productive Lab

0-60

COMMERCIAL SKILLS (Ratio of 1:1)

- Set Up and Job Preparation
- Equipment Operation
- Non-Destructive Testing

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



Training Proposal for:
Ariat International, Inc.

Agreement Number: ET19-0109

Panel Meeting of: June 22, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: L. Lai

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Warehousing Retail Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Alameda	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 221	U.S.: 350	Worldwide: 465	
<u>Turnover Rate:</u>	11%			
<u>Managers/Supervisors:</u> (% of total trainees)	6%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$135,720		\$0	\$0		\$135,720

In-Kind Contribution:	100% of Total ETP Funding Required	\$223,200
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills Computer Skills	180	8-200	0	\$754	\$18.22
				Weighted Avg: 29			

Minimum Wage by County: Alameda County: Job #1 - \$18.22

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Admin/Finance/HR		40
Design Staff		20
IT		30
Management		10
Product Developer		5
Production		15
Sales/Marketing		40
Supply Chain		20

INTRODUCTION

Founded in 1992, Ariat International, Inc. (Ariat) is a manufacturer of innovative performance equestrian footwear and apparel. Featuring a patented technology designed to deliver stability, durability and comfort, Ariat pioneered the application of advanced athletic shoe technology into English riding boots and authentic Western boots. Ariat products are sold online, and in a network of 6,500 retail outlets throughout the world such as Boot Barn, Cavenders, and Tractor Supply Company. Ariat is headquartered in Union City and has a distribution center in Hayward, and two retail outlets in Fresno and Gilroy. Only the Union City location will participate in this training proposal.

PROJECT DETAILS

This will be Ariat's second ETP Agreement, the second in the last five years. In its first ETP contract, Ariat provided training to upskill future leaders along with enhancing fundamental interpersonal skills and product design techniques. This Agreement will continue Ariat's training

efforts in addressing company growth. While some trainees received training under the prior Agreement, they will not receive duplicate training.

In November 2016, Ariat opened its first brick-and-mortar store in Fresno. The launch in Fresno has been so successful that Ariat opened another outlet in Gilroy, and has plans to open two more brick-and-mortar stores in Fiscal Year 2020. This stronger presence in California has resulted in more brand visibility and increased sales. Ariat is projected to grow its revenues 3% every year for the next five years. In addition to the Ariat retail stores, the Company will seek new markets and increasing online sales. Ariat strives to stay ahead of competitors with sales and release innovative new products.

Additionally, Ariat plans to invest approximately \$1 million in new hardware and software platforms such as SAP, and Product Lifecycle Management (PLM), to manage the flow of inventory and transactions worldwide and to support the delivery, management and tracking of a growing company.

As the Company and its systems grow, so must its employees. Ariat's training plan ensures employees across all departments develop the skills required to support the retail industry expansion, increased global online sales, new product innovations, and overall growth to meet customer demands.

Training Plan

Ariat is ready to start training upon approval. Training will be conducted at the Union City facility by both in-house instructors and vendors via Class/Lab and E-Learning in the following:

Business Skills: Training will be offered to all occupations to develop core communication, relationship, customer service, project management and strategic planning skills enabling staff to improve personal effectiveness and maximize team performance crucial to productivity and efficiency. The goal is to reduce costs, improve the quality of work and increase growth. Additionally, trainees will learn the newest techniques in shoe making and design needed to research and develop for the creation of new products.

Computer Skills: Training will be offered to all occupations to effectively use company systems. The goal is to allow effective workflow between different departments to be integrated and result in the Company to handle increased business sales volume.

Commitment to Training

Ariat's annual training budget is \$160,000 and is primarily allocated to onboarding, leadership development, technical & functional skills, general education, and compliance.

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

Ariat's Learning & Development Manager will be responsible for overseeing, coordinating and scheduling all training, enrolling trainees, tracking training hours, ensuring roster compliance, and meeting with ETP staff and will be the primary point of contact with ETP. In addition, the Company will be using RSM US LLP to assist with tracking, roster review, and invoicing within the ETP systems.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by Ariat International, Inc. under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0451	Union City	06/06/16 – 06/05/18	\$399,320	\$148,727* (37%)

**Projected earnings. Ariat is in the process of submitting invoices.*

In its first Agreement, Ariat developed an overly ambitious training plan. Also, the implementation of an intended system to assist with scheduling trainees for training was delayed, which led to improper training documentation which impacted performance. Having learned from that experience, Ariat has developed a practical, achievable plan—from 115 hours per trainee in the prior contract, to 29 hours in this proposal. This new proposal has been reduced to less than the amount previously earned. The Company's new training plan is supported by Senior Leadership.

DEVELOPMENT SERVICES

Ariat retained RSM US LLP in San Diego to assist with development of this proposal for a flat fee of \$5,000.

ADMINISTRATIVE SERVICES

Ariat plans to retain RSM US LLP to perform administrative services in connection with this proposal for a fee, not to exceed 13% of payment earned.

TRAINING VENDORS

Ariat plans to retrain Ken Blanchard Companies of Escondido, CA to provide Leadership training for a fee of \$70,000, and Vital Smarts of Corona, CA to provide Crucial Conversations training for a fee of \$93,750. Other training vendors will be identified for ETP record-keeping purposes, as they are retained by Ariat.

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

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Writing
- Change Management
- Coaching
- Communication Skills
- Conflict Resolution
- Emotional Intelligence
- Finance and Accounting
- Leadership Skills
- Negotiation Skills
- Presentation Skills
- Process Improvement
- Product Knowledge
- Project Management
- Retail Training
- Sales and Marketing
- Stitching and Material Utilization
- Strategic Planning
- Supply Chain Elements
- Teambuilding
- Time Management
- Understanding Leather

COMPUTER SKILLS

- Cognos
- Data Warehouse Systems Applications
- GT Nexus Applications
- Human Resource Systems and Processes (HRIS) Applications
- Learning Management System (LMS) Applications
- Microsoft Office Suite (Intermediate and Advanced)
- Product Lifecycle Management Applications
- Retail POS (Point of Sale)
- SAP 102 – Fundamental (Intermediate)
- Success Factors (Performance Management System)
- Zoom Technology Applications

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



**Panel Amendment #1 Proposal for:
Holthouse Carlin & Van Trigt LLP
Agreement Number: ET17-0182**

Amendment Effective Date: April 23, 2018

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

CURRENT PROJECT PROFILE

Contract Type:	Retrainee SET Job Creation	Industry Sector(s):	Services
Counties Served:	Contra Costa, Los Angeles, Orange, Ventura	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Priority Industry:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Current Contract Term:	October 15, 2016 to October 14, 2018	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$303,000

AMENDMENT FUNDING

Requested Funding	Total Funding
+\$144,000	\$447,000

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimate d No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills, Computer Skills, Cont. Imp., Adv. Tech	360	8-200	0-80	\$825	\$28.37
				Weighted Avg: 55			
2	Retrainee SET Job Creation	Business Skills, Computer Skills, Cont. Imp., Adv. Tech	60	8-200	0-80	\$2,500	\$15.00
				Weighted Avg: 125			

Minimum Wage by County: Job Number 1(SET/Statewide): \$28.37 per hour

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

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

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

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

Wage Range by Occupation	
Occupation Title	Wage Range
Job Number 1	
Operation Support Staff (HR, IT, Admin)	
Accounting Staff	
Accounting Senior	
Accounting Manager 1	
Accounting Manager 2	
Accounting Manager 3	
Operation Manager/Director 1 (Frontline)	
Operation Manager/Director 2 (Frontline)	
Administration Support (Sales/Marketing/Misc.)	
Job Number 2	
Operation Support Staff (HR, IT, Admin)	
Accounting Staff	
Accounting Senior	
Accounting Manager	
Administration Support (Sales/Marketing/Misc.)	

INTRODUCTION

Founded in 1991, Holthouse Carlin & Van Trigt LLP (HCVT) (www.hcvt.com) is a full-service accounting firm that provides accounting, tax, business advisory, and business management services. HCVT serves private and public companies, business owners, high net-worth individuals, and family offices across select industry niches. These industries include real estate and hospitality, private equity/investment advisory, technology, professional service firms, media/entertainment, employee benefit plans, not-for-profit organizations. HCVT also serves various middle-market companies in manufacturing, retail, and distribution. The Company assists clients in all phases of the business cycle ranging from start-up to rapid growth, and mature companies/owners seeking exit strategies.

AMENDMENT DETAILS

The initial training plan was very conservative. HCVT underestimated the number of Job Creation trainees (Job Creation). HCVT requested funding for 60 Job Creation trainees, and in December 2017 realized that they had enrolled 92. By December 2017, HCVT had completed 100% of the total training hours allotted in the Contract.

HCVT is requesting to increase the weighted average of training per trainee from 45 to 55 hours in Job Number 1, from 50 to 125 hours in Job Number 2. The additional hours will allow trainees to continue training, and also provide many course topics in the curriculum. Additional training is needed to address HCVT ongoing changes related to new tax reform and changes in the accounting pronouncements requiring the need for additional training sessions to be conducted.

In summary:

- The funding amount will increase by \$144,000 from \$303,000 to \$447,000.
- The weighted average hours in Job Number 1 will increase from 45 to 55.
- The weighted average hours in Job Number 2 will increase from 80 to 125.
- The average cost per trainee in Job Number 1 will increase from \$675 to \$825.
- The average cost per trainee in Job Number 2 will increase from \$1,000 to \$2,500.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by HCVT under the current ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0182	\$303,000	10/15/16-10/14/18	469	0	0

To date, 19,500 eligible training hours have been tracked (+100% of the current Agreement amount). Although the Contractor has provided training in excess of the Agreement amount, HCVT understands that the terms and conditions of the Contract remain the same unless the changes submitted in the Agreement Revision are approved by ETP.

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

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting and Auditing Update
- Accounting Methods & Techniques
- Auditing Techniques
- Best Practices/Expectations
- Business Acumen
- Business Development
- Business Etiquette
- Business Writing Skills
- Client Relationship and Management
- Conflict Management/Risk Management
- Consumer Product
- Corporate Tax Techniques
- Cross Selling Skills
- Customer Service
- Effective Presentations
- Ethics for Business
- Financial Planning
- Financial Services
- Flow-Through Entity
- High Net Worth Individual
- Influential Communication
- International Tax
- Technical Writing Utilizing Regulatory Guidance
- Technical Employee Orientation and Training (tax/audit processes)
- Negotiation Skills
- New Tax Methods
- Nonprofit Accounting & Audit
- Personal Branding
- Pension Plan
- Planning & Support
- Professionalism
- Proposal Writing/Report Writing
- Research Skills
- Running Effective Meetings
- Small Business Accounting
- State and Local Taxes
- Stock Compensation
- Tax Rules & Regulation Update
- Technical Research – Case Studies
- Trusted Advisor

COMPUTER SKILLS

- Accounting Research
- Adobe
- ADP HR, Recruiting, Payroll
- Bloomberg BNA
- CCH IntelliConnect Tax Research System
- CyberRecruiter
- Engagement Tax Training II
- Finance/Accounting Tools
- Go File Room (GFR)
- Go Systems Tax Software
- Halogen Evaluation System
- Harvard Business School- Advanced Excel Training
- Learnlive
- Lync Messenger
- M-3 / Dynalinking Tax Software
- Marketing Tools
- Microsoft CRM
- Microsoft Dynamics CRM System
- Microsoft Tools (Intermediate / Advanced only)
- Microsoft Quickbooks
- New Systems Training
- Optimization Training Tax Software
- Outlook/Instant Messaging
- PowerPoint Tools
- PPC SMART Practice Aid Audit research system
- Practice Management Billing system
- ProSystems fx Tax Software
- Publisher
- QuickBooks Advanced
- Security Mentor
- Sharepoint
- Sharefile
- Skype for Business
- Social Media Tools (LinkedIn, Twitter)
- SurePrep Tax Software
- Visual Practice Management
- RIA Checkpoint Tax Research System

CONTINUOUS IMPROVEMENT

- Building Effective Teams
- High Performing Teams
- Coaching – Delivering and Receiving Feedback
- Efficiency and Quality Improvements
- Problem Solving/Process Improvement
- Project Management Skills
- Team Building/Team Meetings
- Leadership Essentials:
 - Influential Communication
 - 5 Habits of Intentional Leadership
 - Conflict Resolution
 - Managing and Leading Change
 - Getting Things Done Through Change
 - Situational Leadership

ADVANCED TECHNOLOGY (1:10 ratio)

- Accounting Research - Adv. techniques
- Active Data
- CCH IntelliConnect Tax Research System - Adv. techniques
- Cyber Recruiter – Adv. techniques
- Go File Room (GFR) - Adv. Techniques
- Halogen Evaluation System – Adv. techniques
- LearnLive Compliance Skills – Adv. techniques
- M-3 / Dynalink Tax Software – Adv. techniques
- New Systems Training (Database Tools / Cloud computing)
- PPC SMART Practice Aid Audit research system – Adv. techniques
- Practice Management Billing system – Adv. techniques
- ProSystems fx Tax Software – Adv. techniques
- Sharepoint /SurePrep Tax Software
- Sharepoint Design
- RIA Checkpoint Tax Research System – Adv. techniques

CBT Hours

0 - 80

CBT - COMPUTER SKILLS

- Software Training (1.5 hours)
- Tax/Audit Technical (3 hours)
- Cloud Computing (1 hour)
- Excel 2015 Database Development (1 hour)
- Managing and Analyzing Data in Excel 2010 (1.5 hours)

Lynda.com Microsoft Office (Intermediate & Advanced)

- Up and Running with Excel 2013 (2 hours)
- Cleaning Up Your Excel 2013 Data (1 hour)
- Managing and Analyzing Data in Excel 2013 (1.5 hours)
- Setting Up a Database in Excel 2013 (1 hour)

- Excel 2013: Financial Functions in Depth (2.5 hours)
- Excel 2013: Charts in Depth (3 hours)
- Excel 2013: Pivot Tables in Depth (3.75 hours)
- Excel 2013: Data Validation in Depth (1 hour)
- Excel 2013: Advanced Formatting Techniques (3 hours)
- Excel 2013: Macros in Depth (2.75 hours)
- Excel 2013: Managing Multiple Worksheets and Workbooks (1 hour)
- Excel 2013: Advanced Formulas and Functions (5 hours)
- Excel 2013: Power Shortcuts (3.75 hours)
- Excel 2013: Working with Dates and Times (1 hour)
- Excel 2013: Essential Training (4.75 hours)
- Excel 2013: New Features (2 hours)
- Excel 2013: Real-World Projects (.5 hour)
- Up and Running with VBA in Excel (3 hours)

CBT - BUSINESS SKILLS

- Revenue Recognition Update (2 hours)
- Compilation, Review, and Preparation (1 hour)
- Business Succession Planning: Case Studies (2 hours)

Becker Training

- Capital Gain & Losses (1 hour)
- Corporate Tax Strategies (2 hours)
- Estate & Gift Taxes (2 hours)
- Federal Tax Accounting - Inventory (2 hour)
- Financial Statement Analysis (3.5 hours)
- Individual Taxation (2 hours)
- Real Estate Taxation (2 hours)
- Forensic Accounting (2 hours)
- Audit Risk Assessment (3 hours)
- Partnerships (3 hours)

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



Training Proposal for:

L&S Framing, Inc.

Agreement Number: ET19-0119

Panel Meeting of: June 22, 2018

ETP Regional Office: Sacramento

Analyst: C. Kaiser

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Placer County	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 315	U.S.: 315	Worldwide: 315	
<u>Turnover Rate:</u>	5%			
<u>Managers/Supervisors:</u> (% of total trainees)	11%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$199,342		\$0	\$0		\$199,342

In-Kind Contribution:	100% of Total ETP Funding Required	\$500,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Literacy Skills, OSHA 10/30, PL- Commercial Skills	121	8-200	0	\$1,482	\$16.70
				Weighted Avg: 57			
2	Retrainee Job Creation Priority Rate	Business Skills, Commercial Skills, Computer Skills, Literacy Skills, OSHA 10/30, PL- Commercial Skills	14	8-200	0	\$1,430	*\$13.66
				Weighted Avg: 55			

*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 (Retrainee): \$16.70 per hour for Placer County; Job Number 2 (Job Creation): \$13.66 per hour for Placer County.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 (Retrainee)		
Field Staff		72
Foremen		28
Managers/ Supervisors		14
Administrative Staff		7
Job Number 2 (Job Creation)		
Field Staff		8
Foremen		2
Managers/ Supervisors		1
Administrative Staff		3

INTRODUCTION

Founded in 2011 and headquartered in Rocklin, L&S Framing, Inc. (L&S) is a leading rough framing contractor that provides framing services to single-family home builders nationwide. L&S also fabricates frames and walls and ships completed products to the customer's job site. Customers include private builders Shea Homes and Lennar Corporation. Training will take place at the Rocklin location.

PROJECT DETAILS

This is L&S's second ETP Agreement and the second in last 5 years. In this proposal, L&S will provide training to improve efficiency and overall productivity. The Company will also provide training on production processes, building code updates, and software. There will be no duplication of training for trainees who participated in the prior contract.

The Company will train all staff to improve process efficiencies with a focus on lowering costs, reducing construction times, and improving customer satisfaction. Training on LEAN Construction, Ytwo Formative software, Building Code Updates, and job specific trainings will ensure trainees receive the knowledge they need to be efficient in their occupation and deliver high quality work.

L&S is committed to creating promotional opportunities for its labor force and has created a training plan focused on increasing skill sets and creating a positive working environment to encourage retention and promotion. Training in Communication Skills, Problem Solving & Decision Making, and Customer Service will give trainees transferable skills while promoting the Company's culture.

Retrainee - Job Creation

Since 2016, L&S's workforce has increased 20% and the Company anticipates additional 10% growth in the next 18 months. The increase in growth is due to the recent purchase of a 6 acre second building for \$1,000,000 which is next door to their current building. The purchase increases the square footage by 262,000 square feet. The Company also has a new contract with Lennar Corporation that has a minimum estimated value of \$5,000,000. To meet the current growing demands of L&S's increase in business volume, L&S has committed to hiring 14 new Field and Administrative 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 the contract.

Training Plan

L&S will provide 8-200 hours of Class/Lab and Productive Lab training delivered by in-house experts and vendors as needed in the following:

Business Skills: Training will be offered to all occupations. Training will focus on effective communication and product knowledge. Training topics include Leadership Skills, Sales Skills, Financial Management, and Project Management.

Commercial Skills: Training will be offered to Field Staff, Foremen, and Managers/Supervisors. Training will focus on fabrication and installations. Training topics include Wall and Truss Fabrication, Tool Operation, LEAN Construction, and Project Scheduling.

Computer Skills: Training will be offered to all trainees. Training will focus on machinery software and version updates. Training topics include Ytwo Formative Software, Computer Aided Design and Drafting, and HR Software.

Literacy Skills: Training will be offered to Foremen and Field Staff in order to perform their work duties. Hours are capped at 45% of a trainee's total training hours. Training will include Basic English and Basic Math.

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. The instructor must be dedicated to training delivery during all hours of training.

This training will be at a much slower pace than regular field construction and will provide significantly higher defects as trainees gain proficiency. Training will be conducted by a subject matter expert at the Company's facility as well as job sites. Once the training is complete, the trainer will confirm the trainee's competency. PL training is for the Field Staff. Training topics include Wall and Truss Fabrication, Tool Operation, and Installation Procedures.

Training will be under constant supervision with a 1:3 trainer-to-trainee ratio. L&S is requesting a 1:3 trainer-to-trainee ratio because trainees work in groups of up to three on the job site.

Commitment to Training

The Company's training budget is \$500,000 annually. Company training is for all employees including new hire orientation, job specific trainings, career development, and new processes/technology to help with L&S operations.

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

L&S has a detailed plan to facilitate and administer training. The Director of Operations and a trainer will oversee this project. The Company has a proven process in place to ensure all administrative duties are handled properly given its successful administration of its prior ETP contract. All L&S senior management and managers support this training effort. Additionally, the Company has engaged the services of a third-party administrator with extensive ETP administration experience to work closely with staff to complete the project successfully.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by L&S under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0472	\$179,320	6/6/16 – 6/5/18	110	0	0

As of 5-29-18, based on ETP Systems, 9,740 reimbursable hours have been tracked for potential earnings of \$179,320 (100% of approved amount). The Contractor projects final earnings of 100% based on training completed. Trainees are expected to successfully complete their retention periods.

DEVELOPMENT SERVICES

The L&S retained Propel Consulting Group in El Dorado Hills to assist with development of this proposal for a fee of \$13,449.

ADMINISTRATIVE SERVICES

Propel Consulting Group will also perform administrative services in connection with this proposal for a fee not to exceed 7.5% 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
- Financial Management
- Leadership Skills
- Problem Solving & Decision Making
- Project Management
- Sales Skills

COMMERCIAL SKILLS

- Building Code Updates
- Forklift Operation
- Framing Procedures
- Installation Procedures
- LEAN Construction
- Project Scheduling
- Site Set-up/Clean-Up
- Tool Operation
- Truss Fabrication
- Wall Fabrication

COMPUTER SKILLS

- Computer Aided Design and Drafting (CAD)
- HR Software
- Intellibuild
- Mitek Sapphire Design
- MS Office Suite (Intermediate and Advanced)
- QuickBooks
- Tablet Training
- YTWO Formative Software

LITERACY SKILLS

- Basic English – Written/Language
- Basic Math

OSHA10/30 (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

Productive Lab Hours

0-60

COMMERCIAL SKILLS (Trainer-to-trainee ratio 1:3)

- Floor Lay-Out
- Installation Procedures
- Stair Building

- Tool Operation
- Truss Fabrication
- Wall Fabrication

Literacy Training cannot exceed 45% of total training hours per-trainee
Safety Training cannot exceed 10% of total training hours per-trainee. (This cap does not apply to Hazmat, OSHA 10/30, or HAZWOPER)

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



Training Proposal for:
Lance, Soll & Lunghard LLP
Agreement Number: ET19-0113

Panel Meeting of: June 22, 2018

ETP Regional Office: San Diego

Analyst: J. Davey

PROJECT PROFILE

Contract Attributes:	Retrainee	Industry Sector(s):	Financial Services	
			Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Counties Served:	Orange, Sacramento	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 120	U.S.: 120	Worldwide: 120	
<u>Turnover Rate:</u>	10%			
<u>Managers/Supervisors:</u> (% of total trainees)	6%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$81,466		\$0	\$0		\$81,466

In-Kind Contribution:	100% of Total ETP Funding Required	\$270,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Comm'l Skills, Computer Skills	77	8-200	0	\$1,058	\$16.80
				Weighted Avg: 46			

Minimum Wage by County: Job 1 - \$17.50/hr. for Orange County; \$16.80 for Sacramento County.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Manager		12
Senior Accountant I		5
Senior Accountant II		11
Senior Manager		5
Staff Accountant		12
Supervisor		12
Support Staff		20

INTRODUCTION

Located in Brea and founded in 1929, Lance, Soll & Lunghard, LLP (LSL) (<http://www.lslcpas.com>) provides tax, auditing, estate planning and business advisory services. Its customers include real estate, employee benefit plans and government agencies including cities, municipalities and water districts. LSL also has offices in Sacramento and Santa Ana, both participating in this project.

This is the second project for LSL, and the second in the past five years. Previous training provided trainees with the skills needed to remain competitive, and to stay up-to-date on new IRS tax compliance issues. LSL has subsequently opened a new office in Sacramento, purchased a small firm in Santa Ana, and now needs to train staff on the recent tax laws.

In December 2017, the largest tax cut in the country's history was passed. The full ramifications of this new tax law and how it is implemented is a major training issue facing the firm over the

next two years. LSL must continually update staff on the latest data from the IRS and private sources. As a result of the scope of this historic tax legislation, substantial training will be required over the next 24 months.

LSL has grown significantly since its first ETP agreement. The firm has added 40 employees as a result of its recent purchase of a Santa Ana CPA firm in January 2018. All new employees need training in LSL's business processes and procedures to become fully acclimated to the new firm.

To remain competitive, stay up-to-date on new tax laws, and assimilate new staff in the firm's business culture, LSL has developed a company-wide training program. The need for training is also driven by LSL's continuous effort to grow its business. The Company must improve its accounting and consulting which is critical to acquire new clients and remain competitive.

PROJECT DETAILS

Training will focus on recent annual tax code and other regulatory updates. As a part of these new updates, the Company will offer Accountants, Senior Accountants and Managers extensive regulatory training, with most training occurring later this year. The training identified in the curriculum is the same as the one in the previous project. However, no trainee will receive the same training delivered in the first project. The proposed training hours will not be delivered to trainees to maintain professional licenses.

Training Plan

Training will be delivered via class/lab and E-learning in the following:

Business Skills: Training will be provided in Client Management, Communication, Presentation, Leadership, Marketing and other skills.

Commercial Skills: Training will be provided in Auditing & Tax Updates and Governmental Compliance, Best Practices, Audit Techniques and other skills.

Computer Skills: Training will be provided in Quickbooks, Intermediate Microsoft Office, Adobe Suite and Commerce Clearing House Software Suite and other skills.

E-Learning

LSL will use E-Learning as a training method. Instructors will use a WebEx type of collaboration application to deliver training. The instructors will be located at the Brea headquarters and will provide training to the Sacramento office. Due to the distance trainees or trainers would have to travel to participate in training, E-Learning presents a cost-effective and proven method of training delivery.

Commitment to Training

The company spends approximately \$150K annually on training in sexual harassment prevention, violence in the workplace, CPR and first aid training. In the past LSL has provided training, usually mandatory, to enhance the professional job skills of its accountants, for example new tax laws updates and regulatory changes.

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 will oversee, coordinate, schedule, and track training hours, with the assistance of key administrative staff in each office. Training Refund Group will assist LSL with project administration, including uploading training hours and other duties. Training will be provided by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0142	\$61,798	7/1/16 – 6/30/18	53	46	0

Based on ETP Systems, 2,920 reimbursable hours have been tracked for potential earnings of \$61,798 (100% of approved amount). The Contractor projects final earnings of 100% based on training hours reported to the ETP Tracking system.

DEVELOPMENT SERVICES

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

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8 – 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Client Management Skills
- Leadership Skills
- Team Building
- Communication
- Marketing Skills
- Selling Skills
- Presentation Skills

COMMERCIAL SKILLS

- Fraud (detection, analysis, review)
- Best Practices
- Audit Techniques
- Tax Strategies Project Management
- Accounting & Auditing Updates
- Employee Retirement Income Security Act
- Employer Benefit Plans
- Tax Updates
- Technical Updates (changes to accounting and auditing procedures)
- Estates and Trusts
- Government Accounting Standards Board Update
- Advanced Estate Planning
- Common Fraud and Internal Controls Auditing
- Government Pension Plans
- Government Accounting Standards Board 68
- Business Exit Strategy and Asset Protection

COMPUTER SKILLS

- QuickBooks
- Microsoft Office Intermediate
- Adobe Office Suite
- Checkpoint Research
- Commerce Clearing House Software Suite (tax software)
- Practice CS (LSL internal software)
- Flowtivity Lean Training

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



TRAINING PROPOSAL FOR
McKesson Medical-Surgical Inc.
18-0521

Panel Meeting Date: 06/22/2018
Regional Office: Sacramento Regional Office
Analyst Name: Karen Mam
Type of Proposal: Single Employer
Funding Source: SET

FUNDING OVERVIEW

Provided here is a summary of the funding for the proposed Training Project.

TOTAL ETP FUNDING: \$100,620.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$100,620.00	N/A	N/A	\$200,000.00

APPLICANT PROFILE

Company Summary	McKesson Medical-Surgical Inc. (McKesson) is a medical supply distribution and health care information technology company.
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Industry Sector(s)	Trade (Wholesale)		
Priority Industry	No		
No. Employees (Applicant)	State: 658	US: 68,000	World Wide: 68,000
Turnover Rate (Applicant)	18.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on cross-training newly hired staff on functionality, products and operations.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Job Creation – Retrainee Initiative Program, Retrainee	86	\$26.00	45	\$1,170	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1833 and headquartered in San Francisco, McKesson distributes branded and generic pharmaceutical drugs and other healthcare-related products including medical supplies and healthcare equipment to more than 40,000 customers throughout the United States, Canada and Europe. McKesson serves hospitals, physician groups, doctor offices, urgent care clinics and retail pharmacies. McKesson has three distribution centers in California, however, only the Roseville location will be participating in training. This will be McKesson's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>To meet increased sales demands, the Company recently opened a new distribution facility in Roseville and invested over \$11M in new material handling equipment including forklifts, reach trucks, walkie riders and pallet jacks. The new equipment is more computerized and will require training workers in equipment operations necessary to be efficient and productive. Training will allow the Company to process and deliver more products to its clients.</p> <p>Additionally, staff will be cross-trained on warehouse operations, receiving, picking, packing and inventory systems. Training under this proposal will ensure employees can successfully service customers and work cross-functionally at the new distribution center.</p>
Training Infrastructure and Administrative Plan	McKesson is ready to begin training upon approval. A Human Resources Associate and two Support Staff will coordinate all training efforts including scheduling and tracking training. Training will be delivered by In-house experts and vendors as needed.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

A summary of the curriculum is provided below. See *Attachment 2 - Training Delivery and Curriculum Listing* for more details.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1 will receive training in Computer and Commercial Skills topics listed under Attachment 2.	

PROPOSED TRAINING PROJECT DETAILS

4. Additional Company or Training Project Details

Retrainee – Job Creation

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

With the opening of a new distribution center, McKesson has committed to hiring 86 Material Handlers and Delivery Professionals. To qualify for Job Creation, trainees must be hired within the three-month period prior to Panel approval or during the term of the contract. These trainees will be hired into “net new jobs” as a condition of the contract.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

McKesson has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	CBRE Group Inc	Los Angeles	\$10,062.00
Administrative	None selected to date	N/A	N/A
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional details on the training population, curriculum and associated program characteristics.

Attachment 2 - Training Delivery and Curriculum Listing

Provided below are details on the types of training planned for this proposed Training Project.

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Commercial Skills (Standard)	Batch Building
	Case Picking
	Cycle Counting
	Equipment Operation
	Inbound/Outbound
	Inventory
	Leadership Training
	Logical Unit of Measure (LUM) Picking
	Packing
	Pallet Troubleshooting
	Pick Leader
	Putaway
	Quality Assurance
	Rec Discrepancy
	Receiving
	Replenishments
	Returns
	Shipping
	Sortation
	Specialty Picking
	Warehousing
Computer Skills (Standard)	Kronos
	Workday



RETRAINEE - JOB CREATION

Training Proposal for:

Molecular Bioproducts, Inc.

Agreement Number: ET19-0108

Panel Meeting of: June 22, 2018

ETP Regional Office: Sacramento

Analyst: J. Dongallo

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Retrainee Priority Rate	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sonoma	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 7,500	U.S.: 20,000	Worldwide: 65,000
<u>Turnover Rate:</u>	12%		
<u>Managers/Supervisors:</u> (% of total trainees)	10%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$123,240		\$0	\$0		\$123,240

In-Kind Contribution:	100% of Total ETP Funding Required	\$138,544
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Adv. Tech, Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, OSHA 10/30, Literacy Skills, PL-Mfg. Skills	105	8-200	0	\$1,040	\$16.70
				Weighted Avg: 40			
2	Retrainee Job Creation Priority Rate	Adv. Tech, Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, OSHA 10/30, Literacy Skills, PL-Mfg. Skills	9	8-200	0	\$1,560	*\$13.66
				Weighted Avg: 60			

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

Minimum Wage by County: Job Number 1: \$16.70 per hour in Sonoma County

Job Number 2(Job Creation): \$13.66 per hour in 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 \$2.05 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 (Retrainee)		
Equipment Staff		8
Maintenance Staff		6
Managers		7
Manufacturing Staff		60
Material Handlers		4
Quality Staff		12
Supervisors		8
Job Number 2 (Job Creation)		
Manufacturing Staff		6
Quality Staff		3

INTRODUCTION

Founded in 2003 and headquartered in Petaluma, Molecular Bioproducts, Inc. (MBI) (www.thermofisher.com) is a wholly owned subsidiary of Thermo Fisher Scientific. The Company manufactures injection molding handling pipette tips, micro-centrifuge tubes and racks used for clinical and industrial research. Customers include pharmaceutical and biological laboratories, hospitals and educational institutions that require liquid handling products for scientific research and development.

MBI has numerous locations nationwide. However, training will be delivered only at its Sonoma County facility.

PROJECT DETAILS

Training will focus on improving efficiency, productivity, and new equipment. The need for training is driven by new business and customer demands, industry regulatory requirements and continued training and development.

MBI must upgrade processes and technology to keep pace with industry and customer demands. The Company has invested \$1.44M on computerized injection molding machinery, laboratory robots, precision measuring devices and automated production cells. New and advanced machinery requires staff training in operational and equipment specific manufacturing skills to be efficient and productive.

To standardize operating procedures and meet quality standards as determined within industry regulations, MBI has created internal training for its high-skilled occupations. Training will focus on advanced molding techniques, molding processes and programmable logistics.

Retrainee - Job Creation

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

The Company has invested \$1.44M on new automated machinery using specific and advanced injection molding processing techniques. MBI has committed to hiring nine new Manufacturing and Quality Staff (Job Number 2) to support these equipment upgrades. The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

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

Business Skills: Training will be offered to Material Handlers, Equipment, Manufacturing and Quality Staff. Training will promote administrative efficiency and provide staff with the knowledge and skills to run the business effectively. Training topics include Communication Skills, Customer Service, Monitoring, Product Knowledge and Train-the-Trainer.

Computer Skills: Training will be offered to Material Handlers, Equipment, Manufacturing and Quality Staff. Training will focus on software systems to improve overall processes and productivity. Training topics include Information Security, Intermediate/Advanced Microsoft Office Products, Manufacture Resource Planning, UniPoint and Web Application Skills.

Continuous Improvement: Training will be offered to all occupations to improve customer service and remain competitive within the industry. Trainees will gain skills to increase performance in the following areas: Decision Making, 5S, Fishbone Analysis, Lean Manufacturing Skills, Production Operations/Workflow, Time Management Skills, and Process Flow Analysis and Improvement.

Hazardous Materials: Training will be offered to Material Handlers, Equipment, Manufacturing and Quality Staff. Staff will receive the skills necessary to ensure a safe work environment while working with dangerous materials. Training topics include Hazardous Communication Skills and Bloodborne Pathogen Responder.

Management Skills: Training will be delivered to Managers and Supervisors and focus on enhancing skills to create a productive work atmosphere to motivate and lead staff. Training topics include Coaching, Leadership Principles, Motivation and Team Building.

Manufacturing Skills: Training will be offered to Material Handlers, Equipment, Manufacturing and Quality Staff to ensure the skills and knowledge to operate and maintain new and old production equipment to ensure product quality. Training topics include Assembly Procedures, Charting, Graphs, Gauges and Calibration, Injection Molding, Process Parameters and Sterilization Principles and Practices.

Literacy Skills: Training will be offered to Material Handlers, Equipment, Manufacturing and Quality Staff to ensure effective communication in supporting business processes. Training topics include Vocational Language 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. This coursework is geared towards 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. This training will be offered to Equipment, Manufacturing, Maintenance, Material Handlers, and Quality Staff to ensure a safe work environment.

Productive Laboratory

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

MBI will provide all Manufacturing and Equipment Staff approximately 31 hours of PL. PL will allow employees to perform their duties efficiently while being able to take on additional duties of surrounding machines, if needed. This has been proven to increase efficiencies by lowering any downtime. Staff will receive hands-on training specific to the operation and maintenance of new equipment. PL will supplement the Class/Lab training courses offered in the curriculum.

The instructor will be present at all times. Production is expected to be slowed during PL as the trainer will be stopping production to coach and mentor the trainee. Also, the equipment will be operating at a slower speed until proficiency is gained. The trainer will determine the trainee's level of competency at the end of the training. The trainer-to-trainee ratio for PL training shall not exceed 1:1 for retrainees.

Advanced Technology

Advanced Technology (AT) training will be offered to Manufacturing and Equipment Staff. This training is designed to provide technical and customized courses in injection molding processes, such as Alfredo Calderon Gomez and Rod Groleau Injection Molding Processing Techniques.

These processes require the trainee to know all different phases of the injection molding process in relation to the advanced equipment needed to create the product. The trainee will be expected to know how to troubleshoot and/or modify the complex computerized machinery according to product specifics. Topics including Gate Seals, Ladder Logic, Material Crystallization, Melt/Shear & Diagnosis, Mold Schematics and Process Diagnosis will be delivered under this training.

Due to AT training being more expensive to deliver than more generalized computer/system related subjects, Molecular Bioproducts estimates the cost associated with this specialized training will likely range between \$50 to \$500 per hour, per trainee. Delivery of AT requires expensive system/design equipment and complex software.

Commitment to Training

MBI has an annual training budget of approximately \$20,000 for its Sonoma facility. The Company utilizes in-house subject matter experts to conduct their training. Moving forward, the Company will significantly increase the number of subject matter experts specializing in equipment upgrades to deliver more training. Training 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. MBI 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**

The Practice Process Improvement Business Systems Manager and Environmental Health and Safety Specialist will oversee all aspects of training. The Human Resources Manager and Human Resource Representative will have the primary responsibility of enrolling trainees and tracking training hours. Managers, leads and trainers are informed of their responsibilities related to training delivery and tracking.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

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

8-200 Trainees may receive any of the following:

ADVANCED TECHNOLOGY (1:10 ratio)

- Alfredo Calderon Gomez Injection Molding Process
- Data Handling
- EDART Graph/Data System
- Gate Seals
- Inputs and Outputs
- Introduction to Programmable Logic Control
- Ladder Logic
- Molding Machine Diagnosis
- Molding Machine Platform
- Material Crystallization
- Melt/Shear & Dosage
- Mold Schematics
- Process Diagnosis
- Programming a PLC
- Rod Groleau Injection Molding Process
- Timers/Counters

BUSINESS SKILLS

- Appropriations Requests
- Business Case Creations for Investments
- Communication Skills
- Conflict Resolutions Skills
- Customer Service
- Inventory Control
- Monitoring
- Product Knowledge
- Project Management
- Quality Systems for New Initiatives
- Sales and Marketing for New Products
- Train-the-Trainer

COMPUTER SKILLS

- Agile (Software)
- Calypso (CMM Programming Software)
- Crystal Reports (Software)
- Information Security
- Macola (ERP) (Software)
- Mainsaver (Software)
- Manufacture Resource Planning (MRP)
- Microsoft Office Products (Intermediate/Advanced)
- Microsoft Project (Software)
- Shipping Software
- Trackwise (Software)

- Unipoint (Software)
- Web Application Skills

CONTINUOUS IMPROVEMENT

- 3P
- 5 Why Analysis
- 5S
- Continuous Improvement Techniques
- Decision Making
- Fishbone Analysis
- Jidoka
- Just Do It Projects
- Kaizen Blitz
- Lean Manufacturing Skills
- Manufacturing Cells and Flow
- Pareto
- Practical Process Improvement
- Problem Solving
- Process Flow Analysis and Improvement
- Process Mapping
- Product Quality Improvement
- Production Operations/Workflow
- Pull Systems
- Root Cause Countermeasure
- Single Minute Exchange of Dies
- Strategic Planning
- Teambuilding
- Theory of Constraints & Poka Yoke
- Time Management Skills
- Total Productive Maintenance
- Value Stream Mapping

HAZARDOUS MATERIALS

- Hazardous Communication Skills
- Bloodborne Pathogens Responder

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Coaching
- Communication Skills
- Decision Making
- Leadership Principles
- Motivation
- Planning and Controlling
- Team Building

MANUFACTURING SKILLS

- Assembly Procedures
- Asset Prioritization/Identification
- Charting
- Crane/Hoist Operation

- Forklift
- Gauges and Calibration
- Good Manufacturing Processes
- Graphs
- Injection Molding
- Inventory Control
- Machine Interlocks
- Machine Safeguarding
- ManuProg-Schedule Creation/Updating
- Material Handling/Lifting Devices
- Min/Max Review
- Preventative Maintenance
- Process Parameters
- Production Equipment Operation
- Production Planning
- Production Request Creation
- Reading Schematics
- Scissor Lift
- Standard Operating Procedures
- Sterilization – Principles and Practices

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

LITERACY SKILLS

- Vocational Language Skills

Productive Lab Hours

0-31

MANUFACTURING SKILLS (1:1 ratio)

- Advanced Molding Techniques
 - Diagnosing the Process
 - EDART Graph/Data Process
 - Gate Seals
 - Machine Platform
 - Material Crystallization
 - Melt/Shear & Dosage
 - Mold Schematics
 - Molding Machines Diagnosis

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

This cap does not apply to OSHA 10/30.

Literacy Training cannot exceed 45% of total training hours per trainee.

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



RETRAINEE - JOB CREATION

Training Proposal for:

Mr. C Manager, LLC

Agreement Number: ET19-0120

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative	Industry Sector(s):	Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 225	U.S.: 245	Worldwide: 245
<u>Turnover Rate:</u>	7%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$154,200		\$0	\$0		\$154,200

In-Kind Contribution:	100% of Total ETP Funding Required	\$190,772
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Commercial Skills, Computer Skills, Continuous Imprv.	145	8-200	0	\$920	\$17.54
				Weighted Avg: 40			
2	Retrainee Job Creation Initiative	Commercial Skills, Computer Skills, Continuous Imprv.	20	8-200	0	\$1,040	*\$14.62
				Weighted Avg: 40			

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

Minimum Wage by County: \$17.54 per hour for Job Number 1; and \$14.62 per hour for Job Number 2 (Job Creation) for Los Angeles County.

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

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

Up to \$2.44 per hour for Job Number 1; and up to \$1.37 per hour for Job Number 2 may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Housekeeping Staff		40
Customer Service Staff		30
Support/Office Staff		25
Food Service Staff		25
Chef		11
Manager/Supervisor		14
Job Number 2		
Housekeeping Staff		10
Customer Service Staff		10

INTRODUCTION

Founded in 2011, Mr. C Manager, LLC (Mr. C) (www.mrchotels.com) is a luxury hotel located in Los Angeles. The Hotel is a 180-room property that caters to out-of-state and international

upscale travelers. Mr. C is eligible for standard retraining under the out-of-state competition provisions as a convention conference hotel competing for national and international business.

The Company has several challenges driving the need for training: recent expansion of the hotel, including a new extended stay service; business expansion in Western Europe that attracts international guests and increases demand; new culinary offerings (gluten-free and organic menu); continued changes in industry requirements and guest expectations; new technology requirements; and the continued training of new employees.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be subject to a lower post-retention wage. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. These trainees will be hired into "net new jobs" as a condition of contract.

This expansion requires retraining of existing employees, combined with the hiring and training of new employees to keep up with the increase in business and sustain desired service levels. Mr. C has committed to hiring 20 new Housekeeping Staff and Customer Service Staff (Job Number 2) to support the Company's increased business capacity. Recently, Mr. C hired 15 Customer Service Staff, Administrative Staff, Food Services Staff and Housekeeping Staff, consistent with its hiring and growth plan.

PROJECT DETAILS

Mr. C must upgrade and continue its adaptation to a high performance workplace, support growth and maintain its world-class customer service. Mr. C's strategic plan for 2018-2020 includes upgrading incumbent workers' skills and internal computer software, specifically focusing on methods and procedures that will improve and continue to attract and retain its services, new and existing guests, providing a healthier culinary menu, hiring new employees and standardizing processes and best practices across all departments.

This will be the third Agreement between ETP and Mr. C, the third in the last five years. Previous training focused on Smart technology, mobile services and changes due to demographics and where conservative in nature. Consistent with the current overall training demand, company growth and program experience this training proposal will concentrate on new service and guests, upgrade worker job skills, increase services and best practices to exceed customers' demands and expectations and comply with industry requirements to support the Company's growth. None of the training from the prior ETP Agreement will be repeated except for newly hired trainees that did not participate in prior ETP training.

The Company anticipates additional growth of 10% in the coming year. To keep up with this growth, Mr. C has purchased a \$30,000 training program, Forbes Travel Guide, which is an extensive training program to evaluate weaknesses and develop effective training procedures and practices.

Training Plan

Training will be provided via Classroom/Laboratory and Videoconference in the following:

Commercial Skills: This training will be offered to all occupations and will focus on better interactions with changing international clients and improve working relationship with Online Travel Agencies to exceed guest's requirements and expectations.

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 allow trainees to effectively use the Company's automated systems to provide efficient and effective customer service.

Continuous Improvement: This training will be offered to all occupations to focus on streamlining operations in order to provide a seamless procedure for their guests. Mr. C will be implementing changes in standard work procedures in order to ensure processes are consistent and changing guest requirements are met. The Company will also focus on resolving problems and training front-line leadership to lead change.

Commitment to Training

Mr. C has a current annual training budget of approximately \$142,000. Training consists of new hire orientation, job-specific skills training, mandated training and some on-the-job training. Once the ETP program has concluded, Mr. C is committed to continuing the quality and frequency of employee 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 in-house staff, Kirkpatrick Enterprises International and vendors if needed. The Director of Finance and three project staff will oversee training and all administrative responsibilities. Mr. C has also retained a third party administrator for enrollment, data training and invoicing.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET17-0372	Los Angeles	12/16/16 – 12/15/18	\$88,320	TBD
ET15-0272	Los Angeles	09/08/14 – 09/07/16	\$91,080	\$75,140 (82%)

*ET17-0372 – Based on the ETP Systems, Mr. C has delivered 6,365.25 hours representing \$95,478.75 (108% of funding). As such, Mr. C expects to close out this Agreement early and projects to earn 100% of the approved amount.

DEVELOPMENT SERVICES

Mr. C retained Kirkpatrick Enterprises International (KEI) in Valencia to assist with development of this proposal at no cost.

ADMINISTRATIVE SERVICES

KEI will perform administrative services for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

KEI will also provide Commercial Skills and Continuous Improvement training for an amount to be determined.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200

Trainees may receive any of the following:

COMMERCIAL SKILLS

- International Cultures and Requirements
- Global View
- Integration of Services with Advanced Technology
- Technology Usage
- Hospitality & Advanced Communication Skills
- Upselling with Customer Focus
- New Culinary Requirements For International Guests
- Menu Presentation and New Dietary Demands and Restrictions
- Working with Online Travel Agencies (OTSS) and Getting the Right Feedback

COMPUTER SKILLS

- Seamless Reservation System and OTA Tie-ins
- Point Of Sale Applications and technology
- Internet and SMART Technology

CONTINUOUS IMPROVEMENT

- Forbes Travel Guide
- Standard Work Procedures
- Client Service as a Team
- Front-Line Leadership
- Problem Identification and Resolution
- Process Skills

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



TRAINING PROPOSAL FOR
Novogradac & Company LLP
17-0701

Panel Meeting Date: 06/22/2018
Regional Office: San Francisco Bay Area Regional Office
Analyst Name: Samantha Wang
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

Provided here is a summary of the funding for the proposed Training Project.

TOTAL ETP FUNDING: \$ 105,800.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 105,800.00	N/A	\$ 0.00	\$ 237,697.01

APPLICANT PROFILE

Company Summary	Novogradac & Company LLP (Novogradac) (https://www.novoco.com/) is an accounting and consulting firm that provides audit, tax, property and general consulting services in affordable housing, community development and renewable energy tax credit.
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Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. Employees (Applicant)	State: 195	US: 546	World Wide: 546
Turnover Rate (Applicant)	3.88%		
Repeat Contractor	No		
High Unemployment Area	No		

Union(s)	No
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TRAINING PROFILE

Training Objective(s)	Novogradac seeks ETP funding to train employees in several tax and audit programs to serve their clients.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	115	\$ 23.00	40	\$ 920	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1989 and headquartered in San Francisco, Novogradac offers cost-effective auditing, taxing, and consulting services. Through consultation, the Company offers programs such as low income housing tax credits, new market tax credits, renewable energy tax credits, and historic rehabilitation tax credits.

With approximately 20 locations throughout the United States, Novogradac provides its services and programs to a variety of industries including: nonprofits, government agencies, development and construction companies, real estate investment companies, and security firms.

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

Tax and audit codes and regulations are ever-changing and necessitate training. Contractor must train workers on updates to the Internal Revenue codes, Treasury regulations, and Statutes to effectively serve customers. Novogradac will not use ETP funds to maintain CPA license or for any continued education purposes.

The following types of training will be included:

- **Business Skills** - Training topics include Auditing and Accounting Standard, Financial Accounting Standards Board (FASB) Update, and American Institute of Certified Public Accountants (AICPA) Update to ensure all staff are knowledgeable and understand the practical guidelines when assisting clients.
- **Computer Skills** - Training topics include Risk of Electronic Communications and Use of Social Media, and Computer Security Awareness. Accountants use social media as a platform to share information and personal opinions within the industry on how to best implement tax laws. This training allows all staff to learn the best practices for utilizing technology to communicate. Risk awareness will enable staff to identify messages that may be misleading.
- **Management Skills** – Managers and Supervisors will receive training on ERP Reporting Functionality and Loss Drivers, which allows Managers and Supervisors to know the variables that may impact claims. This training addresses avoiding risky behaviors that can cause claims under malpractice insurance.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	The Company's internal subject-matter expert will deliver the training. Two full-time coordinators in each of the 4 participating locations will schedule, oversee training, collect rosters, which will be maintained at one California facility. The Training Associate will upload the trainee's information and hours into the ETMS. Some training may be done by vendors.
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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.

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
The Types of training that will be delivered by E-Learning will be in Business, Computer, and Management Skills.	

4. Additional Company or Training Project Details

Additional information is displayed below.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

N/A

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.

<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Accounting & Auditing MidYear TuneUp
	Accounting Standards Update
	Agreed Upon Procedures
	AHACPA Affordable Housing Update
	American Institute of Certified Public Accountants(AICPA)
	Analytical Procedures
	Audit Documentation
	Audit Evidence
	Audit Sampling
	Audit Standards Update: Clarifying Risk Assessment
	Auditing Standards Update
	Auditing Standards: A Comprehensive Review
	Auditors Reports & Special Situations
	Audits of Employee Benefit Plans
	Avoiding Problems in Conducting Single Audits
	Basic Concepts of Governmental Accounting, Financial Reporting and Auditing
	Casualty Events: Tax and Generally Accepted Accounting Principles (GAAP) Treatment
	Common Frauds and the Internal Controls Designed to Prevent and Detect Them
	Financial Accounting Standards Board (FASB)
	Forecast Refresher
	GASB Basic Financial Statements for State and Local Governments
	Generally Accepted Accounting Principles (GAAP) Update
	Generally Accepted Auditing Standards (GAAS) Update
	Group Audits
	How to Use PPC
	Joint Engagements between Audit/Tax and GoVal Groups
	Loan Modification
	New Clients, Initial Audit Procedures and Best Practices to Succeed
	New Standard on Going Concern: Client vs. Auditor Responsibility
	Not-for-Profit Organizations: Accounting Principles and Risk Management
	Operating Expense (OpEx) Training
	Passed Adjustments
	Performing & Reporting Compilation & Review
	Preparation and Presentation of Financial Statements
	Preparing & Reporting on OCBOA Financial Statements
	Revenue Recognition: What CPAs Need to Know
	Statement of Standards for Accounting and Review Services (SSARS)
Computer Skills (Standard)	Computer Security Awareness
	Computer Security Awareness (by our insurance co.)
	Cyber Threats

Attachment 2 - Training Delivery and Curriculum Listing

Provided below are details on the types of training planned for this proposed Training Project.

	General Productivity (Outlook, scheduling)
	Office 2016/Windows 10 Training
	Paperless Review/Audit Productivity
	Risk of Electronic Communications & Use of Social Media
Management Skills	Enterprise Resource Planning FAQ
	ERP Reporting Functionality
	Loss Drivers: Variables that Impact Claim Frequency



RETRAINEE - JOB CREATION

Training Proposal for:

Pacifica Foods, LLC

Agreement Number: ET19-0103

Panel Meeting of: June 22, 2018

ETP Regional Office: San Diego

Analyst: H. Bernard

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange, Riverside	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 322	U.S.: 322	Worldwide: 322
<u>Turnover Rate:</u>	13%		
<u>Managers/Supervisors:</u> (% of total trainees)	9%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$145,600		\$0	\$0		\$145,600

In-Kind Contribution:	100% of Total ETP Funding Required	\$155,682
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills	90	8 - 200	0	\$1,040	\$16.70
				Weighted Avg: 40			
2	Retrainee Job Creation Priority Rate	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills	50	8 - 200	0	\$1,040	*\$13.66
				Weighted Avg: 40			

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

Minimum Wage by County: Job Number 1: \$16.70 per hour in Riverside County and \$17.50 per hour in Orange County

Job Number 2 (Job Creation): \$13.66 per hour in Riverside County and \$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		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Production Staff		72
Supervisor/Manager		9
Administrative Staff		9
Job Number 2 –Job Creation		
Production Staff		40
Supervisor/Manager		4
Administrative Staff		6

INTRODUCTION

Headquartered in Corona, Pacifica Foods, LLC (Pacifica) (www.pacificafoods.net) manufactures refrigerated, frozen and shelf stable dressings, sauces, soups, fresh salads and dips. The Company specializes in pouching foods up to 10 pounds for industrial use, food service and value-added meal kits. Customers include wholesale distributors, retail food markets, restaurant chains and specialty shops.

Stir Foods, LLC (Stir Foods), an affiliate of Pacifica, will participate in training. Pacifica will be the contract lead employer. Pacifica has two locations in Corona that will participate in training. Stir Foods is located in Orange with a facility in Fullerton. All four locations will participate in their first ETP Agreement.

PROJECT DETAILS

Pacifica & Stir Foods are experiencing steady growth and expect a 30% increase in revenue over the next two years. This growth is due in part to an increase in customers as well as new product lines including mayonnaise, cream cheese and new spreads. Both companies are increasing staff to keep up with demand. Pacifica is adding a new production shift in 2018. Both companies are adding new equipment costing approximately \$2 Million. Pacifica is adding a new packaging machine, lift machine, and cupping machine. Stir Foods is adding a new production line which funnels prepared foods into a cooler system, and a case packer which assembles packing boxes. These new pieces of equipment require extensive training at both locations for Production and Management Staff.

Both Pacifica and Stir Foods are required to comply with standards required by Food and Drug Administration via the Food Safety Modernization Act (FSMA). The FSMA was implemented to prevent foodborne illness and ensure food safety standards across the industry. Training on the FSMA standards is ongoing for all employees with up to 40 hours of training on topics including Safe Quality Food Handling, Good Manufacturing Practices and Allergen Management. In addition, the Companies' goals are to minimize waste by 95%. This includes reducing water utilized during production and upgrades to air compressor controls, and plumbing. These upgrades will require training for all staff, specifically the Production Staff.

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.

Due to anticipated growth, product diversification and new equipment, Pacifica has committed to hiring 26 new employees and Stir Foods has committed to hiring 24 new employees, (50 new employees) in 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 in the following:

Business Skills: Communication Skills, Project Management, Product Knowledge and Change Management

Computer Skills: Financial/Accounting and Manufacturing Software Programs, Materials Requirement Software Program

Manufacturing Skills: Good Manufacturing Practices, Equipment Operation, Standard Operating Procedures

Continuous Improvement: Leadership Skills, Lean Manufacturing, Lean Waste Reduction, 5S Program

Certified Safety Training

Hazardous Materials (HAZMAT): Production Staff and Supervisors/Managers will receive up to 24 hours of HazMat training. Completion of the training results in a certificate that expands employment opportunities. This coursework is administered under the Department of Transportation and CalTRANS.

Productive Laboratory

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

Training in PL-Manufacturing Skills will be provided to approximately 20 Production staff on preventative maintenance and equipment operations, including newly acquired equipment. Training will be conducted by a qualified instructor at a 1:1 trainer-to-trainee ratio. Trainees will receive approximately 25 hours of PL training.

Commitment to Training

Both companies spend approximately \$129,000 annually on training. This includes Team Building and Continuous Improvement 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

The Company is ready to begin training upon approval. Pacifica's Human Resources Director will work in conjunction with the Human Resources department at Stir Foods to oversee the entire project. In addition, the Human Resources Coordinator will oversee project administration at Pacifica. Stir Foods Human Resources Manager will oversee training and administration at the Stir Foods locations. Training Funding Source has been retained to assist with project administration. Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Training Funding Source (TFS) in Seal Beach assisted with development for a flat fee of \$3,500

ADMINISTRATIVE SERVICES

TFS 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

BUSINESS SKILLS

- Change Management
- Coaching
- Conflict Resolution
- Communication Skills
- Problem Solving/Root Cause Analysis
- Product and Service Knowledge
- Project Management

COMPUTER SKILLS

- Materials Requirement
- Syspro and Red Zone Software
- Financial/Accounting/Manufacturing Software Programs

CONTINUOUS IMPROVEMENT

- Leadership Skills
- Lean Manufacturing
- Lean Waste Reduction
- 5S Program
- Teambuilding
- Total Preventive Maintenance
- Standard Operating Procedures

HAZARDOUS MATERIALS

- Hazardous Materials

MANUFACTURING SKILLS

- Good Manufacturing Practices
- Hazard Analysis & Critical Control Point
- Production Equipment & Tool Preventative Maintenance
- Sanitation Procedures/Materials

PL Hours

0 – 25

MANUFACTURING SKILLS (ratio 1:1)

- Production Equipment & Tool Preventative Maintenance
- Equipment Operations

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:

Pioneer Circuits, Inc.

Agreement Number: ET19-0114

Panel Meeting of: June 22, 2018

ETP Regional Office: San Diego

Analyst: K. Hernandez

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Priority Rate Retrainee	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 245	U.S.: 245	Worldwide: 245
<u>Turnover Rate:</u>	7%		
<u>Managers/Supervisors:</u> (% of total trainees)	13%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$152,880		\$0	\$0		\$152,880

In-Kind Contribution:	100% of Total ETP Funding Required	\$161,040
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Improv., HazMat, Mgmt. Skills, Mfg. Skills	140	08-200	0	\$1,040	\$17.50
				Weighted Avg: 40			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Computer Skills, Cont. Improv., HazMat, Mgmt. Skills, Mfg. Skills	7	08-200	0	\$1,040	*\$14.58
				Weighted Avg: 40			

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

Minimum Wage by County: Job Number 1: \$17.50 per hour in Orange County;

Job Number 2 (Job Creation): \$14.58 per hour in Orange County

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

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

Up to \$2.50 for Job Number 1 and \$1.58 for Job Number 2 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administration Staff		15
Operators		75
Frontline Managers		20
Engineers		22
Sales Staff		15
Job Number 2- Job Creation		
Operators		5
Engineers		2

INTRODUCTION

Founded in 1981, and headquartered in Santa Ana, Pioneer Circuits, Inc. (PC) is a leading manufacturer of flex and rigid flex printed circuit boards (PCB). PC manufactures extremely complex rigid, rigid-flex, and flex PCB's that include bookbinder technology (allowing multiple flex layers to bend at different radii), alternative shielding (such as constantan for thermal management), extended length flex circuits, and high temperature woven fabric material reinforcement (patented technology that adds strength and durability to flex circuits). PC also offers design, mock-up, research and development, as well as concurrent engineering services related to its products.

PC's customers include US government agencies and companies producing applications in the military, avionic, satellite, and deep space sectors. Military applications include missiles, and missile defense systems for Raytheon and Northrop Grumman. Avionic applications include fighter planes and UAV's for GE Avionics and Boeing. Satellite applications include communication and defense systems for NASA and Lockheed Martin. Deep space applications include Launch Systems and Rovers for NASA's Jet Propulsion Laboratory and Motive Space Systems.

PROJECT DETAILS

PC must increase production capacity to manufacture complex rigid, rigid-flex, and meet product demands from new and existing customers. To address this need, PC has expanded production areas and assembly services, repurposed machinery, and purchased the following pieces of new equipment: autoclaves, drilling machine, etch machines, and photo printers. To fully utilize its new work areas, machinery and equipment, the Company will train Operators in the skills necessary to increase production capacity by focusing training on Assembly Process, New Equipment Training and Quality Assurance/Quality Control.

PC must also increase efficiency in the production and delivery of products to improve on-time-delivery and decrease remakes. PC is working with a consultant to re-engineer and restructure administrative and production operations. The consultant will make recommendations to PC's management team to utilize staff in new roles to increase sales, upgrade current processes and systems, and introduce strategies to rework production flow. Training will be delivered to all occupations, focused on the sales process, software systems training, new production floor configurations, new equipment training, and operating repurposed machinery. Training to increase efficiency, on-time-delivery and decrease remakes will include Project Management, Salesforce.com, Leadership Skills and Process Engineering.

Retrainee - Job Creation

With an increase in production capacity and efficiency, PC anticipates they will have an increase in customer demand and sales. PC must increase its workforce over the next two years. The Company needs to expand its workforce by at least 7 new employees (Job Number 2) in the occupations of Engineering and Operations. The new staff members will require significant training focused on Business and Manufacturing Skills. 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 in the following:

Business Skills: Training will be provided to Administration Staff, Sales Staff, Engineers and Frontline Managers to improve Sales Skills, Communication and Customer Service.

Computer Skills: Training will be provided to Administration Staff, Sales Staff, Engineers and Frontline Managers to effectively utilize Salesforce.com and Solidworks.

Continuous Improvement: Training will be provided to Operators, Engineers and Frontline Managers to improve processing of New Materials and Capabilities.

Management Skills: Training will be provided to Frontline Managers that will allow trainees to increase their Leadership Skills to manage teams and develop staff into the Company's next level of managers.

Manufacturing Skills: Training will be provided to Operators, Engineers and Frontline Managers to build the skills necessary to increase production capacity and efficiency. Training will focus on CAM/Tooling, Drilling and Industry Certifications.

Certified Safety Training

Hazardous Materials (HAZMAT). This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from "first responder" to "incident commander." It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Operators, Engineers and Frontline Managers will receive up to 24 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, the certification entity has not yet been determined.

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, PC invested \$300,000 in training. PC trains its staff on the Standard Operating Procedures for each production process. This is important because PC builds for military and aerospace customers and must ensure all staff understand the current customer driven SOP requirements. Certification training is also very important because military and aerospace applications require staff maintain specific certifications due to the sensitive nature and use of the products.

Training Infrastructure

Training will be delivered by PC's in house trainers/Managers, and vendors will be procured as needed. The HR Manager and Controller will oversee this project. PC's HR Manager will ensure trainers have an understanding of ETP attendance roster documentation and administrative processes. The HR Manager will work with the Managers of each department to identify specific training needs, recommend training to upper management, and get upper management's approval of requested training. The Company has hired Propel Consulting Group (PCG) to support its administrative efforts. PC's HR Manager will work with PCG to coordinate the enrollment of trainees, tracking training hours in ETP's Systems, reporting project status, verifying training and retention completion, and ensuring compliance with all ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Propel Consulting Group assisted with development of this proposal for a fee of \$7,644.

ADMINISTRATIVE SERVICES

PC retained Propel Consulting Group to 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**

08-200

Trainees may receive any of the following:

BUSINESS SKILLS

- + Sales Skills
- + Communications
- + Data Analyzation
- + Project Management
- + Customer Service

COMPUTER SKILLS

- + Salesforce.com
- + Intermediate/Advanced MS Office
- + Solidworks

CONTINUOUS IMPROVEMENT

- + Processing with New Materials
- + Processing New Capabilities

HAZARDOUS MATERIALS

- + HAZ Communications
- + HAZ Waste Management
- + HAZ Materials Handling
- + HAZWOPER
- + Lockout Tagout

MANAGEMENT SKILLS (Managers Only)

- + Leadership Skills
- + Reporting/Measuring
- + Internal Audits
- + Team Building

MANUFACTURING SKILLS

- + Engineering Planning
- + CAM/Tooling
- + Process Engineering
- + Inner Layer Photo
- + Lamination Process
- + Drilling
- + Wet Process
- + Outer Layer Photo
- + Final Process
- + Product Handling
- + Electrical Test
- + Final/In-Process Inspection
- + Assembly Process
- + Manufacturing Basics
- + Quality Assurance/Quality Control
- + New Equipment Training
- + Industry Certifications (IPC, J-STD, NASA-STD)

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

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



Training Proposal for:
Sierra Nevada Brewing Co.
Agreement Number: ET19-0116

Panel Meeting of: June 22, 2018

ETP Regional Office: Sacramento

Analyst: C. Kaiser

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Veterans	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Butte County	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 430	U.S.: 852	Worldwide: 852	
Turnover Rate:	3%			
Managers/Supervisors: (% of total trainees)	19%			

FUNDING DETAIL

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

In-Kind Contribution:	100% of Total ETP Funding Required	\$250,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Improv., Hazwoper, Mgmt. Skills, Mfg. Skills, OSHA 10/30, PL- Mfg. Skills	395	8-200	0-100	\$312	\$16.70
				Weighted Avg: 12			
2	Retrainee Veteran Priority Rate	Business Skills, Computer Skills, Cont. Improv., Hazwoper, Mgmt. Skills, Mfg. Skills, OSHA 10/30, PL- Mfg. Skills	30	8-200	0-100	\$208	\$16.70
				Weighted Avg: 8			

Minimum Wage by County: Job Numbers 1 & 2: \$16.70 per hour for Butte 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 & 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1: (Retrainees)		
Administrative Staff		54
Brewery Staff		85
Managers/ Supervisors		82
Marketing Staff		14
Production Staff		100
Customer Service Staff		9
Sales Staff		51
Job Number 2: (Veterans)		
Brewery Staff		10
Managers/ Supervisors		5
Marketing Staff		3
Production Staff		7
Customer Service Staff		2
Sales Staff		3

INTRODUCTION

Founded in 1980 and headquartered in Chico, Sierra Nevada Brewing Co. (Sierra Nevada) (www.sierranevada.com) is a craft brewery manufacturer of ales and lagers. Sierra Nevada expanded from a Pale Ale home brewing hobby to one of the top breweries in the United States. The Company distributes goods to retailers nationwide. In addition to manufacturing ales and lagers, Sierra Nevada's Chico location has an onsite restaurant, tasting room, and gift shop. Training will be provided at the Chico location.

This is Sierra Nevada's third ETP Agreement and the second in last five years.

PROJECT DETAILS

Sierra Nevada is improving efficiency and production capacity through LEAN Manufacturing training and equipment upgrades. Through LEAN Manufacturing staff will expand their skill level, improve product quality, and reduce waste. The Company continues to update equipment as the industry changes. New equipment upgrades require Sierra Nevada to provide workers with operational and process improvement skills training to be efficient and productive.

Training will also focus on standardizing operating procedures. Training will consist of classroom, Productive Lab and computer based training conducted by in-house experts. Staff will receive training in the areas of brewing processes, administration, marketing, and customer service.

Veterans Program

Sierra Nevada will train 30 Veterans (Job Number 2) who have served an active full-time duty in the Armed Forces. A modification to training hours is not requested.

Training Plan

Sierra Nevada will provide between 8-200 hours of Class/Lab and Productive Lab training delivered by in-house experts and vendors as needed in the following:

Business Skills: Training will be offered to all occupations. Training will provide the skills to effectively and efficiently maintain business operations. Training topics include Brewing Fundamentals, Customer Service, and Communication Basics.

Computer Skills: Training will be offered to all occupations. Training will focus on software for tracking goods, purchase orders, and internal software. Training topics include Forecasting, Purchase Order Tracking, and Sight Glass. Training is intended to improve software skills.

Continuous Improvement: Training will be offered to all occupations. Training will focus on eliminating waste and improving processes. Training topics include LEAN Manufacturing, 6 Sigma, and Project Management.

Management Skills: Training will be offered to Managers/Supervisors. Training will focus on effective leadership, and promoting a positive work environment. Training topics include Managing Change and Leadership Skills.

Manufacturing Skills: Training will be offered to Production Staff and Managers/Supervisors. Training will focus on beer production and bottling, engineering, and plant services. Training topics include Beer Bottling, Beer Filtration, Raw Materials Intake and Handling, Environmental Engineering, and Quality Assurance.

Certified Safety Training:

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

Hazardous Waste Operations and Emergency Response Standard (HAZWOPER). This training is 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. Trainees will not receive 40 hours unless they work full time onsite at the clean-up location.

Productive Laboratory

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

Sierra Nevada will provide approximately 60 hours of PL training. Sierra Nevada is requesting a 1:3 trainer-to-trainee ratio as equipment requires up to 3 employees to operate.

This training will be at a much slower pace than regular production with significantly higher defects as trainees gain proficiency. An in-house subject matter expert will conduct training. Occupations that will receive PL include Brewery Staff, Production Staff, and Managers/Supervisors of the brewing and production departments.

Computer-Based Training (CBT)

CBT will supplement Class/Lab training. Trainees in Job Numbers 1 and 2 will receive up to 100 hours of CBT. Courses include Customer Service, Brewing History, Quality Assurance Training, and Core Brands.

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 has a standing training committee consisting of the training team, company owners, and top-level executives to ensure that developed training is in line with their long-term company goals and vision. Since the prior Contract, they implemented an online tracking system via their intranet that allows the employee to view and sign up for upcoming trainings.

➤ **Training Infrastructure**

Sierra Nevada has 3 dedicated employees, the head Technical Trainer, the Employee Development Specialist, and the Employee Development Specialist's assistant who will oversee training and administration of the ETP Contract. The head Technical Trainer is responsible for working with subject matter experts to develop and implement technical trainings and the Employee Development Specialist and assistant are responsible for scheduling, administering, and maintaining all levels of the current trainings. They will continue this process with the ETP Contract requirements and are confident that the ETP Contract will be handled accurately.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET14-0296	Chico	2/3/14 to 2/2/16	\$148,392	\$0 (0%)

Poor performance was due to difficulty meeting 24 hour minimum. The contract was terminated early so the Company could participate in a MEC, Butte County College, with only 8 hour minimum training hours.

The company has many additional employees who need training and cross training so Sierra Nevada is coming in with their own Contract and will do the majority, if not all trainings in-house.

Sierra Nevada's first ETP Agreement, ET11-0140, was successfully completed at 78%.

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

- Brewing Fundamentals
- Customer Service
- Communication Basics
- Contract Negotiation
- Introduction to Craft Beer
- Negotiation Skills
- Purchasing
- Selling Skills

COMPUTER SKILLS

- Forecasting
- General Accounting
- Information Systems Management
- Microsoft Office Suite (Intermediate and Advanced)
- Purchase Order Tracking
- Sight Glass
- Switch Board

CONTINUOUS IMPROVEMENT

- 6 Sigma
- LEAN Manufacturing
- Project Management
- Statistical Process Controls

HAZWOPER

- HAZWOPER Refresher (Must Complete 8 hours)
- HAZWOPER (24-hour Course)
- HAZWOPER (40-hour Course)

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Leadership Skills
- Managing Change
- Performance Management and Goal Setting
- Supervisor/Manager Training

MANUFACTURING SKILLS

- Beer Bottling
- Beer Fermentation
- Beer Filtration
- Beer Kegging
- Brewhouse Operations/Production of Wort
- Environmental Engineering
- Laboratory Methods and Instruments
- Plant Engineering

- Plant Sanitation/Plant Services
- Quality Assurance
- Raw Materials Intake and Handling
- Safety (Safe start)
- Shipping and Receiving
- Utilities and Process Control
- Warehousing

OSHA10/30 (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

Computer-Based Training Hours

0-100

BUSINESS SKILLS

- Customer Service (15 min)
- Hopline Sales Training (15 min)
- Rail Spur (15 min)
- Sustainability 101 (15 min)

CONTINUOUS IMPROVEMENT

- Bigfoot Barleywine (15 min)
- Brewing History (15 min)
- Core Brands (15 min)
- Draught Beer: Intro to Proper Draught Serving (15 min)
- Grain Handling (15 min)
- Narwhal Imperial Stout (15 min)
- Pure Safety (15 min)
- Quality Assurance Training (30min)
- Serving Beer (15 min)
- Serving Skills (15 min)
- Sidecar Orange Pale Ale (15 min)
- Summerfest and Nooner (15 min)
- Sustainable Travel Guidelines (15 min)
- Taproom Receiving Guidelines (15 min)
- Tesla Batteries (15 min)
- The Basics of a Bee Hive (15 min)
- The Recycling Game (15 min)
- Topical Torpedo (15 min)

Productive Lab Hours

0-60

MANUFACTURING SKILLS (1:3 Ratio)

- Beer Fermentation
- Beer Filtration
- Beer Bottling/Canning
- Beer Kegging
- Brewhouse Operations/Production of Wort
- Plant Services/Clean in Place
- Quality Assurance/Laboratory Methods and Instruments

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

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



Training Proposal for:
Sierra Pacific Home & Comfort, Inc.
Agreement Number: ET19-0104

Panel Meeting of: June 22, 2018

ETP Regional Office: Sacramento

Analyst: K. Jones

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Construction Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 113	U.S.: 113	Worldwide: 113
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

FUNDING DETAIL

<div style="background-color: #ffffcc; padding: 2px;">Program Costs</div>	-	<div style="background-color: #ffffcc; padding: 2px;">(Substantial Contribution)</div>	=	<div style="background-color: #ffffcc; padding: 2px;">Total ETP Funding</div>	
\$196,378		\$0		\$196,378	

In-Kind Contribution:	100% of Total ETP Funding Required	\$224,800
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills	91	8-200	0-80	\$2,158	\$16.80
				Weighted Avg: 83			

Minimum Wage by County: Job Number 1: 16.80 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 \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Solar Installer		16
Window Installer		21
Service Technician		21
HVAC Installer		31
Administrative Staff		2

INTRODUCTION

Founded in 1984, and headquartered in Rancho Cordova, Sierra Pacific Home & Comfort, Inc. (Sierra Pacific) (<https://www.sierrapacifichome.com/>) specializes in installation, diagnosis, and repair of Heating, Ventilation and Air Conditioning (HVAC) systems. Sierra Pacific also provides window installation services and recently expanded into the solar panel installation industry. Sierra Pacific's core customer base includes both residential and commercial clients throughout Northern CA. This will be Sierra Pacific's first ETP Agreement. Training will be conducted at the Company's sole Rancho Cordova location.

PROJECT DETAILS

The Company's need for training is driven by recent expansion into the solar panel industry. In November 2017, Sierra Pacific added a solar installation division to meet customer demand for energy efficient energy alternatives. Staff must be trained to effectively install, maintain and service solar equipment. Trainees will receive Commercial Skills training on proper handling of solar equipment and building codes/regulations to guarantee safe and quality installation.

Sierra Pacific has experienced increased demand for smarter and more efficient HVAC systems. Energy efficient and Smart HVAC systems have become a major part of Sierra Pacific's equipment

and service offerings. Trainees must be knowledgeable of all products and services to accurately promote the Company's HVAC systems, windows, and solar offerings. Additionally, the Company's installers and service technicians must remain current with the newest industry technologies and trends to remain competitive.

In a service-driven industry, customer service impacts business. Sierra Pacific's training will focus on reducing service call response times. Training in Communication Skills, Sales Presentation and Project Management will support this initiative.

Training Plan: Class/Lab and CBT training will be provided by a combination of in-house trainers and vendors.

Business Skills: Training will be offered to all occupations. Trainees will receive Customer Service, Product Knowledge, Leadership, Communication Skills, and Problem Solving to increase client satisfaction and product knowledge.

Commercial Skills: Training will be offered to Solar Installers, Window Installers, HVAC Installers, and Service Technicians. Trainees will receive technical job skills needed to support the Company's product offerings, services and customers. Training topics include Blue Print Interpretation, Solar Installation and Maintenance, Project Estimation, Window and Door Installation. Trainees will be able to understand the core of product availability and types of issues that can arise with installation, repair and maintenance.

Computer Skills: Training on the Auto Attendant Phone Systems and Successware 21 software will be delivered to all trainees. Administrative Staff will also receive training on iSolved Payroll and Intermediate/Advanced MS Office to increase efficiency of business practices and understanding of internal software systems.

Computer Based Training

Sierra Pacific has coordinated with Lennox HVAC Learning Solutions to develop an HVAC certification program designed to focus on diagnostics and installation best practices. The certification program will supplement trainees' classroom and field training, using rubrics to measure a trainee's progress and knowledge.

This is a two week CBT certification program. This certification will only be offered to select trainees who demonstrate aptitude and a drive to complete the program. The program will help trainees gain promotional opportunities and become subject matter experts in their field.

HVAC Technicians and Installers in Job Number 1 will receive up to 80 hours of CBT training for the HVAC certification program.

Commitment to Training

Sierra Pacific 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 prevention in the workplace, and sexual harassment prevention. Sierra Pacific's Vice President (VP) of Operations developed the training plan that will be carried out under this training Agreement.

ETP funds will not displace the 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**

Each division of Sierra Pacific has one Operations Manager to coordinate training and collect rosters. These managers will report training progress to the VP of Operations on a monthly basis. Sierra Pacific has seven designated trainers that will coordinate and schedule training for all divisions. The Company has hired a third party administrator, Propel Consulting Group, to assist with ETP administrative requirements.

Impact/Outcome

Training will allow the Company to become a high performance workplace. Employees will become familiar with new technologies and obtain skills to manage sustainable growth and long term career opportunities within the organization.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Sierra Pacific retained Propel Consulting Group of El Dorado Hills to assist with development of this proposal for a flat fee of \$11,856.

ADMINISTRATIVE SERVICES

Propel Consulting Group will also perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

Lennox HVAC Learning Solutions of Sacramento has been retained to provide training for a fee of \$4,000.00 per trainee.

Other trainers will be identified for ETP record-keeping purposes, as they are retained by Sierra Pacific.

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

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting Techniques
- Communication Skills
- Customer Service
- Decision Making
- Financial Analysis
- Leadership
- Problem Solving
- Product Knowledge
- Project Management
- Sales Presentation
- Teambuilding

COMMERCIAL SKILLS

- Blue Print Interpretation
- Building Regulations
- Disposal of Hazardous Materials
- Equipment Operation
- Handling of Hazardous Materials
- Home Performance Techniques
- HVAC Installation and Maintenance
- Project Estimation
- Quality Control
- Solar Installation and Maintenance
- Tool Operation
- Water Heater Installation and Maintenance
- Window and Door Installation

COMPUTER SKILLS

- Auto Attendant Phone Systems
- Centah
- Google My Business
- HVAC Learning Solutions
- Intermediate/Advanced MS Office
- iSolved Payroll
- Social Media Platforms
- Successware 21
- When I Work Software

CBT Hours

0 – 80

Trainees may receive any of the following:

Computer Based Training (CBT)

- HVAC Learning Solutions Certification (80 hours)

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



Panel Amendment #2 Proposal for:
Sky Rider Equipment Company, Inc.
Agreement Number: ET17-0294

Amendment Effective Date: February 28, 2018

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: J. Romero

CURRENT PROJECT PROFILE

Contract Type:	Priority/SB<100 Retrainee Job Creation	Industry Sector(s):	Manufacturing Services
Counties Served:	Orange	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Current Contract Term:	November 10, 2016 to November 9, 2018	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$70,980

AMENDMENT FUNDING

Requested Funding	Total Funding
+\$27,144	\$98,124

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Priority Rate Retrainee	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, OSHA 10/30	60	8-150	0	\$1,326	\$16.51
				Weighted Avg: 51			
2	Job Creation Priority Rate Retrainee	Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, OSHA 10/30	6	8-150	0	\$3,094	\$13.76
				Weighted Avg: 119			

Minimum Wage by County: Job Number 1: \$16.51 per hour for Orange County

Job Number 2 (Job Creation) \$13.76 per hour for Orange County

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

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

Up to \$2.53 per hour may be used to meet the Post-Retention Wage for Job Number 1; and up to \$1.73 per hour for Job Number 2

Wage Range by Occupation	
Occupation Title	Wage Range
Job Number 1	
Manufacturing	
Installation	
Administrative	
Supervisor/Manager	
Technical/Service/Sales Staff	
Engineering	
Owner	
Job Number 2 – Job Creation	
Manufacturing	
Installation	
Technical/Service/Sales Staff	
Engineering	

INTRODUCTION

Founded in 1984 and located in Anaheim, Sky Rider Equipment Company, Inc. (Sky Rider) designs, manufactures and installs façade access systems for new construction and existing buildings. Products include davits and davit sockets, interior and exterior monorail track systems and mobile roof carriage systems. Sky Rider also distributes and provides expert installation of Building Maintenance Units, Erect-a-Step Modular Platforms, Ground-based Access LEO Series and Tieback devices for both new and retrofit applications. The Company also offers a service department for its own equipment, and equipment manufactured by others. Sky Rider services over 800 buildings in the Northern and Southern California areas as well as buildings in Nevada and Arizona.

AMENDMENT DETAILS

The Company has provided training exceeding more than 100% of the approved funding. Due to the company expansion and increased product demand, Sky Rider employees need additional training hours. The entire workforce is in the process of migrating to a new ERP system, ACTSoft Encore and ACTSoft Encore Fleet, which will streamline procedures. This additional training will enable workers to readily respond to product demand, maintaining company quality and efficiency standards. Sky Rider requests to add Computer Skills training topics (ACTSoft Encore and ACTSoft Encore Fleet) and to increase the weighted average training hours:

- For Job Number 1, increase from 40 to 51
- For Job Number 2, increase from 55 to 119

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARY OF PRIOR MODS/AMDS

Revision 1: Revise Range of Hours: Increase maximum Range from 60 to 150

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by Sky Rider's under the current ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0294	\$70,980	11/10/16 – 11/12/18	67	0	0

Based on ETP Systems, 2,730 reimbursable hours have been tracked for potential earnings of \$70,980 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through August 2018. Currently, 23 workers are nearing completion of their planned training and maximum training of 150 hours. The remaining 44 are closely reaching their average training hours however are still in need of additional training which will be completed upon receiving the additional hours of training included in this Amendment.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 150 Trainees may receive any of the following:

BUSINESS SKILLS

- Coaching
- Communication Skills
- Customer Service
- Finance/Accounting Procedures
- Goal Setting & Prioritizing
- International Traffic in Arms Regulations
- Leadership
- Planning, Zoning, Permitting, Building Layout, Construction, Installation, Start-Up
- Product Knowledge
- Project/Program Management
- Sales
- Teambuilding
- Time Management
- Work Processes and Procedures

COMPUTER SKILLS

- Adobe
- Autodesk Software (Inventor, Revit)
- AutoCad
- Calibration Manager
- Class Inventor 3-D modeling
- Document Control
- Sage 50/Financial/Accounting/HR/Payroll
- Engineering Design Software
- Inventor
- Microsoft Office/Project
- Payroll Processing
- Web Applications
- **ACTSoft Encore**
- **ACTSoft Encore Fleet**

CONTINUOUS IMPROVEMENT

- 5S
- Internal Audits
- Process Improvement
- Problem Solving – Root Cause Analysis/Decision Making
- Productivity Improvement
- Quality Improvement
- Statistical Process Control
- Six Sigma Process Controls
- Value Stream Mapping

HAZARDOUS MATERIALS

- Hazardous Communications
- Hazardous Material handling

MANUFACTURING SKILLS

- Blueprint Reading
- Building Maintenance Units provided by Gondolas in Design
- Design, Service, and Repair of Hi-Rise Exterior Maintenance Systems
- Diagnostics, Service and Repair
- Distribution/Supply Chain/Logistics Procedures
- Equipment Operation, Maintenance & Troubleshooting
- Erect A Step
- Fabrication
- Facade Access Systems (davits, sockets, interior and exterior monorail track systems and mobile roof carriage systems)
- Good Manufacturing Processes
- Ground Based Access
- Inspection and Repair Services on Window Washing Systems
- Lean Manufacturing (5S, reduce cycle time, eliminating waste, reducing cost)
- MasterCam
- Material Requirements Planning
- Rigging Winch
- Scaffold Inspection and Testing
- Shop Equipment & Tools
- Socket and Davit, Skylight Monorail Track System, Roof Car
- Structural, Mechanical and Electrical Design/Engineering
- Tiebacks & CDC Systems
- Tirak Hoists Powered Platforms
- Welding, Brazing Mig & Tig

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

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10 (Requires completion of 10 hours)
- OSHA 30 (Requires completion of 30 hours)

Note: Reimbursement for retraining is capped at 150 total hours per-trainee, regardless of method of delivery.
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Training Proposal for:
Sturgeon Services International, Inc.

Agreement Number: ET19-0121

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate HUA	Industry	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Kern, Ventura	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 350	U.S.: 350	Worldwide: 350	
<u>Turnover Rate:</u>	23%			
<u>Managers/Supervisors:</u> (% of total trainees)	12%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	=	Total ETP Funding
\$193,960		\$0		\$193,960

In-Kind Contribution:	100% of Total ETP Funding Required	\$214,200
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee HUA Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Impr., HazMat, Mgmt. Skills, PL-Comm'l Skills	190	8-200	0	\$858	*\$12.53
				Weighted Avg: 33			
2	Retrainee Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Impr., HazMat, Mgmt. Skills, PL-Comm'l Skills	35	8-200	0	\$884	\$16.70
				Weighted Avg: 34			

*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 for Kern County; Job Number 2: \$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 \$2.50 per hour may be used to meet the Post-Retention Wage in Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1-Kern		
Administration/Clerical Staff		18
Safety Staff		10
Construction Crew		73
Shop/Yard Maintenance Staff		12
Roustabouts		19
Equipment Operators		15
Quality Control Staff		2
Managers I		10
Managers II		2
Trans. Driver		14
Supervisors		15

Job Number 2-Ventura		
Construction Crew		16
Trans. Driver		4
Roustabouts		10
Safety Staff		1
Equipment Operators		3
Supervisors		1

INTRODUCTION

Founded in 1926, Sturgeon Services International, Inc. (Sturgeon) (www.sturgeonservices.com) is a family-owned oilfield and commercial construction company. Sturgeon is headquartered in Bakersfield, with nine locations statewide. Training will also be provided to Sturgeon's wholly owned subsidiary, Sturgeon and Son Grading and Paving Inc., which is co-located. Sturgeon specializes in heavy equipment earth moving projects (ground restoration), asbestos and lead removal, commercial construction, grading and paving. Other services include hazardous waste removal, line pigging, line abandonment, hydro blasting, ground restoration, remediation, and Tier I and II rescue. There will be two locations participating in training under this Agreement, Bakersfield and Ventura.

PROJECT DETAILS

This will be Sturgeon's fifth training project, and third within the last five years. Previous training focused on Lean methods. In this proposal, Sturgeon will provide more detailed curriculum content to better identify waste, utilizing process analysis methods like process mapping, 5S, Kaizen and Kan Ban. These tools will help quantify current waste and identify potential gains in efficiencies and productivity. In addition, the company will provide training on a new quality control program to establish quality standards that will meet customer demand. Intensive training on the quality control program will introduce staff to new quality standards, principles, and department processes.

The requirements for grading and paving on commercial sites differs from oilfield and residential sites. Additional training is needed in best practices for grading and paving. Workers may also receive training in ground restoration and remediation to return industrial sites to natural state or preparation of areas for further development. Training will increase competency among Construction Crew, Operators and Quality Control Staff.

Sturgeon works in commercial construction within various municipalities and must provide staff with special training to ensure workers have the knowledge and experience to meet municipal requirements, codes and standards for particular job sites. Training in topics such as Municipal Codes and Permit Processing will also increase productivity without delays and major affects to the bottom line profit of a job Sturgeon has been hired to complete.

Training Plan

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

Business Skills: Training will be offered to Supervisors, Administration, Safety and Quality Control Staff to improve customer service and learn Municipal Code and Permit requirements.

Commercial Skills: Training will be offered to Shop/Yard Maintenance Staff, Construction Crews, Roustabouts, Transportation Drivers and Equipment Operators. Course topics will increase worker skill sets in grading and paving.

Management Skills: Training will be offered to Managers/Supervisors to improve leadership and communication skills among department heads/leaders.

Hazardous Materials: Training will be offered to the Construction Crew, Supervisors, Equipment Operators, Shop/Yard Maintenance Staff and Roustabout workers. HazMat training will ensure staff has clear knowledge of requirements and tools available to restore ground to its natural state following exposure to hazardous material spills or leakages. Trainees will learn how to neutralize contaminants by safely removing it and bringing the area to its original state.

Computer Skills: Training will be offered to Quality Control Staff, Managers and Administrative Staff. Training will be provided on computer software programs such as E-Ticket which tracks and analyzes on-going costs for labor, equipment, materials, billing and payroll.

Continuous Improvement: Training will be offered to all occupations to continue implementation of lean practices and a new quality control program. Training content will include lean methods and tools to identify waste and potential gains with the use of various process analysis methods such as process mapping.

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.

Sturgeon will provide PL-Commercial Skills training to 50 Equipment Operators in heavy equipment operation that will be used in various service lines at company locations. Heavy equipment used by workers will include steamrollers, graders, land leveling equipment, vacuum and guzzler trucks. Trainees will receive comprehensive training on earthmoving, oilfield, and well service equipment. This particular equipment is too large and expensive to conduct this level of training outside of the job site.

Trainees will demonstrate operation of equipment at the standards and tolerance necessary to perform the job in a commercial/municipal setting. PL training is provided at a much slower pace to ensure Operators are following protocol and able to complete job tasks as assigned by the instructor. Final work will be measured against known codes, and standards of the job site municipality. Staff will spend approximately one hour on each piece of equipment for approximately eight hours per trainee. The Company is requesting a trainer-to-trainee ratio of 1:2. This is optimum for learning as trainees retain information, and work together in small groups.

Turnover Rate/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.

The employee turnover rate during the 2017 calendar year was 23% with an average headcount of approximately 362 employees. This rate was directly related to the following business factor as follows:

Sturgeon suffered direct effects of the oil crisis (price collapse) experienced between 2014 and 2016. This caused many major businesses to be driven out of the market, as well as a loss in profitability for major projects. It is estimated that approximately 400,000 workers in the oil and gas industry were terminated from Employers. As oil prices began to plunge, Sturgeon also lost its demand for services being there were not enough drilling or on-going projects to sustain its employee population. As a result, Sturgeon's workforce dropped to ½ its employee population by the end of 2016 with a turnover rate of 40%. The most recent calculation for the prior year has decreased from 40% to 23%, implicating a resurgence in the oil market.

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.

Commitment to Training

Sturgeon spends approximately \$185,000 annually on training per facility and includes OSHA, specialized training, on-the-job and safety training.

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

➤ Training Infrastructure

The Director of Training will oversee project administration. With the assistance of company personnel and safety staff, the training team will schedule training sessions, perform data entry, meet and correspond with ETP Staff, and ensure compliance with ETP record keeping requirements. These staff members have ETP experience as they were responsible for administration duties completed under the last ETP Agreement. Training will be delivered by in-house experts.

Training staff is on-going for newly hired workers to prepare them for field work. Training for incumbent staff will begin July 2018. The training team for both locations have scheduled training. Training rosters will be submitted to the Bakersfield administration team for submission and recordkeeping requirements.

High Unemployment Area

Trainees in Job Number 1 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's locations in Kern County qualify for HUA status under these standards. For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Sturgeon request a wage modification to \$12.53 per hour for these trainees.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0336	Bakersfield & Ventura	02/01/16-01/31/18	\$404,984	\$194,550 (48%)
ET14-0236	Bakersfield & Ventura	12/31/13-12/30/15	\$627,672	\$604,115 (96%)

ET16-0336: Poor performance was due to ineffective project administration. The administrative vendor was removed from the project and the Company neglected to designate an individual to oversee the project administration until late in the contract term. After appointing the Executive Assistant to manage the project, the remainder of the project ran efficiently; however the Contractor earned only 48% for this project.

The Director of Training and Human Resources Director will oversee this Agreement to ensure all documentation and administrative duties are completed properly and timely. Each location has a designated staff member to administer and collect training rosters as completed under prior successful ETP training projects. Staff will ensure all training is documented and in compliance with ETP record keeping requirements. Designees will then turn all rosters and documentation to the main office located in Bakersfield for submission.

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

- Construction Math
- Job Bidding and Estimating
- Jobsite Staging and Logistics
- Municipal Code/Permit Processing Requirements
- Sales Training

COMMERCIAL SKILLS

- Commercial Grading and Paving Best Practices
- Confined Space Training*
- Drainage and Runoff
- Heavy Equipment Operations
- Tier II Rescue Training*

COMPUTER SKILLS

- Computer-Assisted Drawing Software (CAD/CAD 3D)
- E-Ticket

CONTINUOUS IMPROVEMENT

- Lean Training
- Sturgeon Quality Control Training

HAZARDOUS MATERIALS

- Ground Remediation Best Practices
- Hazardous Materials handling, Storage and Cleanup

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Coaching and Mentoring
- Strategic Planning

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

Productive Lab Hours

0-40

COMMERCIAL SKILLS (Ratio 1:2)

- Heavy Equipment Operation
 - Graders
 - Land Leveling
 - Steamrollers
 - Vacuum
 - Guzzler Trucks

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:

Systems and Software Enterprises, LLC dba Zodiac Inflight Innovations

Agreement Number: ET19-0106

Panel Meeting of: June 22, 2018

ETP Regional Office: San Diego

Analyst: J. Davey

PROJECT PROFILE

Contract Attributes:	Job Creation Priority Rate Retrainee	Industry Sector(s):	Aerospace and Defense Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Orange	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 330	U.S.: 330	Worldwide: 66,490	
<u>Turnover Rate:</u>	4%			
<u>Managers/Supervisors:</u> (% of total trainees)	12%			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$99,840		\$0	\$0		\$99,840

In-Kind Contribution:	100% of Total ETP Funding Required	\$125,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	251	8-200	0	\$390	\$17.50
				Weighted Avg: 15			
2	Retrainee Priority Rate Job Creation	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	5	8-200	0	\$390	*\$14.58
				Weighted Avg: 15			

*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 - \$17.50/hr. for Orange County; Job Number 2 (Job Creation) - \$14.58/hr. for Orange County

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

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		25
Customer Service Staff		15
Director/Manager/Supervisor		30
Engineers		96
IT Staff		15
Production Worker		45
Sales/Marketing Staff		5
Technical Support Staff		20
Job Number 2		
Administrative Staff		1
Engineers		1
IT Staff		1
Production Worker		1
Technical Support Staff		1

INTRODUCTION

Headquartered in Brea and founded in 1996, Systems and Software Enterprises, LLC dba Zodiac Inflight Innovations (Zodiac Inflight) designs, manufactures and maintains airline in-flight entertainment systems. As part of the Zodiac Aerospace family of companies, Zodiac was purchased in February 2018 by Safran SA of France and operates as a wholly-owned subsidiary. This is Zodiac Inflight's first ETP Agreement.

Zodiac Inflight's products are found in commercial and military aircraft including Airbus, Air France, ANA, Lufthansa, SAS and Philippine Airline. The Company's flagship product is the "RAVE" system, a "seat-centric" in-flight entertainment system. The system's video screen is located on the back of each passenger seat, where each passenger can control his/her own screen. Brea is the only Zodiac Inflight location, therefore, the only location participating in training.

PROJECT DETAILS

Technology is changing the in-flight entertainment marketplace. Airlines now offer more entertainment and online services. In-flight entertainment systems offer Wi-Fi and broadband data capabilities on networks that must work securely and independently from those that control aircraft. These new requirements create the need to train employees on new engineering and manufacturing skills so that these new entertainment systems can offer the greatest variety of services safely and securely.

In addition, airline customers also require the Company to reduce costs, improve quality, introduce these new features and improve reliability. ETP-funded training will allow the Company to achieve these goals, as well as reduce waste, reduce repair reworks, improve on-time delivery time and increase profitability.

Director occupation

Although the job title "Director" is included in occupational titles, these are frontline workers who do not set company policy. They function at a managerial level consistent with ETP policy on frontline workers. Two Directors are expected to participate in training: Marketing Director and Continuous Improvement Director. Both positions spend more than 60% of their work hours leading and supervising frontline staff.

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.

Zodiac Inflight has committed to hiring five new employees (Job Number 2) during the term of the Agreement. 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.

By expanding its existing production capacity, Zodiac Inflight's business is expected to grow over the next two years. As a result, the Company will hire five new employees during the term of the ETP contract. The Company will train and employ these workers at the Brea facility, which has ample space to accommodate these new employees.

Training Plan

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

Business Skills: Training will be offered in Business Procedures, Communication Skills, Conflict Management, Product Knowledge and Project Management.

Computer Skills: Training will be offered in Computer Aided Design, Computer Networking, In-flight Software Applications, Internet Connectivity, Intranet Applications, RAVE Wireless Services for IOS and Android and Solidworks.

Continuous Improvement: Training will be offered in Best Manufacturing Practices, Lean Manufacturing, Root Cause Analysis, Safe and Reliable In-flight Systems, Team Problem Solving and Troubleshooting Processes.

Manufacturing Skills: Training will be offered in Assembly Procedures, Design Standards & Processes, Inspection Equipment, Maintenance Procedures and Manufacturing Techniques.

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.

Engineers and Production Workers will receive approximately 40 hours of PL training on Calibration Equipment, Fault Detection Systems, Inspection Equipment and Technical Tools. The Company reports that classroom instruction is an insufficient means of training delivery because trainees must learn how to operate highly technical equipment that is only available in the production environment. The equipment is calibrated and can't be transported outside the work environment.

In addition, to ensure that the skills are adequately transferred to trainees, the PL trainer-to-trainee ratio will not exceed 1:3. The PL trainer will work closely with trainees to demonstrate, observe and evaluate the trainees as they learn PL skills.

E-Learning

Zodiac Inflight requests the use of E-Learning as a training method. Instructors will use a WebEx type of instruction. The instructors will be located at other companies in the Zodiac family and trainees will be located at the Brea Zodiac Inflight location.

Temporary-to-Permanent

Zodiac requests 10 Temporary-to-Permanent employees to participate in this agreement. Trainees will be employed by a temporary staffing agency at the start of training. The Company will hire the employees into a full-time permanent positions before the final 90 days of the contract term. Trainees will receive Health Benefits after they've been employed full-time for 90 days.

As a condition of training temp-to-perm employees, trainees will not be eligible for reimbursement until they are employed full time by Zodiac Inflight. Employees will become full-time within six months of employment. Employees will meet the 90 day wage requirement within the term of the ETP Agreement and all other terms and conditions of the ETP Agreement.

Commitment to Training

The Company's annual training budget is \$100K and includes new-hired orientation, OSHA mandated training, sexual harassment prevention, and first aid. The Company has an on-the-job

training program for manufacturing skills. In addition, MS Office (Basic Level) and Management Development is provided on an as needed basis.

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

➤ Training Infrastructure

The HR Manager and the HR Assistant will oversee all administration. The HR Assistant will ensure that training is scheduled, that trainers are aware of documentation requirements, and that rosters are completed and collected.

Company Supervisors will conduct training. In addition, E-learning training may be also delivered by instructors in the Zodiac Aerospace family. Company Administrators and Supervisors will work with vendor, National Training Company, Inc. (NTS), on ETP procedures and appropriate document control processes to ensure that training is properly documented.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

NTS in Irvine assisted with development for a flat fee of \$5,000.

ADMINISTRATIVE SERVICES

NTS 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

- Business Procedures
- Coaching/Counseling/Motivation Techniques
- Communication Skills
- Conflict Management
- Customer Service and Sales Skills
- Effective Business Reports
- Goal Setting
- In-Flight Entertainment Systems
- Negotiation Skills
- Product Knowledge
- Project Management
- Technical Certifications
- Time and Priority Management

COMPUTER SKILLS

- Computer-Aided Design
- Computer Networking
- Cyber Security
- Database Administration
- Embedded Software
- Engineering Software Applications
- Enterprise Resource Planning Systems
- In-Flight Software Applications
- Internet Connectivity
- Intranet Applications
- Inventory Control
- Media Servers
- Microsoft Office (Intermediate/Advanced)
- Project Software
- RAVE Wireless Services for IOS and Android
- Software Applications
- Software Development
- Solidworks (Computer-Aided Design)
- Wi-Fi Applications

CONTINUOUS IMPROVEMENT

- AS9101 & ISO9001
- Best Manufacturing Practices
- Coaching/Counseling/Motivation Techniques
- Contamination Elimination
- Leadership Skills
- Lean Manufacturing
- Product Safety and Reliability
- Quality Systems Training
- Root Cause Analysis
- Scheduling & Planning
- System Audit
- Team Building
- Team Problem Solving
- Train-the-Trainer
- Troubleshooting Processes

MANUFACTURING SKILLS

- Assembly Procedures
- Control Systems
- Design Standards & Processes
- Designing and Building Personal Control Units
- Electrostatic Discharge
- Engineering and Design Procedures
- Equipment Cross-Training
- Equipment Maintenance/Repair Skills
- Foreign Object Detection
- General Manufacturing Procedure Training
- Hardware Systems Tools
- Inspection Equipment
- Lot Traceability
- Maintenance Procedures
- Manufacturing Techniques
- Production Systems
- Radio-Frequency Processors
- Repair Station Procedures
- Resolving Production Problems
- Standard Operating Procedures
- Supplier Auditing
- Technical Specifications/Procedures
- Testing Materials and Equipment
- Troubleshooting
- Using Equipment Safely

PL Hours

0-40

MANUFACTURING SKILLS (Ratio 1:3)

- Calibration Equipment
- Engineering Systems
- Fault Detection Systems
- Inspection Equipment
- Technical Tools

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:

Timberworks Construction, Inc.

Agreement Number: ET19-0107

Panel Meeting of: June 22, 2018

ETP Regional Office: Sacramento

Analyst: D. Jordan

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 650	U.S.: 650	Worldwide: 650
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	2%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$199,550		\$0	\$0		\$199,550

In-Kind Contribution:	100% of Total ETP Funding Required	\$287,940
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Comm'l Skills, Computer Skills, HazMat, HAZWOPER, Literacy Skills, OSHA 10/30, PL-Comm'l Skills	190	8-200	0	\$910	\$16.80
				Weighted Avg: 35			
2	Retrainee Job Creation Priority Rate	Business Skills, Comm'l Skills, Computer Skills, HazMat, HAZWOPER, Literacy Skills, OSHA 10/30, PL-Comm'l Skills	25	8-200	0	\$1,066	*\$14.00
				Weighted Avg: 41			

*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: Priority: Job Number 1: \$16.80 per hour in Sacramento County;
Job Number 2 (Job Creation): \$14.00 per hour in Sacramento County

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		7
Designers		8
Foremen		50
Framers		120
Managers		5
Job Number 2		
Administrative Staff		1
Designers		1
Foremen		3
Framers		20

INTRODUCTION

Founded in 2005 and located in Sacramento, Timberworks Construction, Inc. (Timberworks) provides lumber framing services on projects related to production homes, multi-family housing, and mixed use buildings. In addition to the framing of structures, the Company builds and installs walls. Timberworks customers include DR Horton, Lennar Homes, William Lyon Homes and Meritage Homes. Training will take place at Timberworks only location in Sacramento. This is Timberworks first ETP Agreement.

Need For Training

Due to a resurgence in the housing market Timberworks has seen an increased demand for services. To meet these demands, the Company developed a training plan to increase the productivity, efficiency, and technical expertise of staff. Training will consist of classroom and structured hands-on training focused on improving staff's skills.

Training will focus on framing, installation, and workflow procedures as well as Truss fabrication to ensure quality and uniformity between work sites. Courses in Tool Operation, Process Improvement Procedures, Computer-Assisted Drafting, and Quality Control will ensure trainees have the skill sets they need to be successful. Trainees will also receive courses in building code updates including new Silica rules related to respiratory requirements, energy efficiency, and site run-off.

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

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.

Timberworks has grown 30% over the last few years and expects this growth to continue. In addition, Timberworks customers expect high production rates and high quality during the current housing boom. This demand requires Timberworks to hire additional staff. The Company has committed to hiring 25 trainees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

PROJECT DETAILS

Training Plan

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

Business Skills: Training will be delivered to all staff except Framers and focus on Communication Skills, Accounting/Payroll Techniques, Project Management, Communication Skills and Sales Techniques. Training will allow staff to better communicate with clients and have a better grasp on managing staff.

Commercial Skills: Training will be delivered to all occupations and focus on Building Code Updates, Framing Procedures, Truss Fabrication, Tool Operation, Installation Procedures and Quality Control. Training will allow staff to become experts in their craft when it comes to trade skills and the latest in building codes.

Computer Skills: Training will be delivered to all staff except Framers and focus on AutoCAD, Intermediate and Advanced Microsoft Office, Tablet training, BuildPro, SupplyPro and Sage 100 Contractor SQL. These courses will allow staff to become experts on new software updates and more efficient with their workload.

Literacy Skills: Training will be delivered to Foremen and Framers and focus on English as a Second Language, Written and Language. These trainings will allow staff to effectively communicate and understand staff.

Certified Safety Training

1. OSHA 10/30. Training will be delivered to Managers and Foremen. 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). Training will be delivered to Foremen, Framers and Managers. 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.

Productive Laboratory

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

Training will be delivered to Framers. Trainees will work with a trainer who will explain and demonstrate step-by-step instructions and then observe while trainees perform these same tasks. Training will consist of courses in Floor Lay-Out, Stair Building, Wall Lay-Out, Hand Tool Operations and Installation Procedures. Production will be affected and more materials will be wasted due to the trial and error process. Timberworks will provide approximately 50 hours of PL-Commercial skills training at a 1:3 trainer-to-trainee ratio. Timberworks is requesting a 1:3 ratio because of the nature of its work and the size of the frames. Also, framing a home solely in a test environment would require land resources that are not available as well as create a great amount of wasted building materials.

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. He VP of Business Development and two administrative staff members will oversee all project training and administration. In addition, the Company has retained Propel Consulting Group 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

Propel Consulting Group in El Dorado Hills assisted with development for a flat fee of \$12,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting/Payroll Techniques
- Communication Skills
- Customer Service
- Financial Management/Reporting
- Problem Solving & Decision Making
- Project Management
- Sales Techniques
- Teambuilding

COMMERCIAL SKILLS

- Building Code Updates
- Computer-Assisted Drafting
- Forklift Operation
- Framing Procedures
- Installation Procedures
- Process Improvement Procedures
- Product Identification
- Project Scheduling
- Project Workflow Procedures
- Quality Control
- Site Set-Up/Clean-Up
- Tool Operation
- Truss Fabrication

COMPUTER SKILLS

- AutoCAD
- BuildPro
- Intermediate/Advanced Microsoft Office
- QuickBooks
- Sage 100 Contractor SQL
- SupplyPro
- Tablet Training

HAZARDOUS MATERIALS

- HAZMAT
- Hazardous Material Handling/Cleaning

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

- OSHA 10
- OSHA 30

LITERACY SKILLS

- English as a Second Language
 - Written
 - Language

Must be job related and hours are capped at 45% of a trainee's total training hours

PL Hours

0 – 50

COMMERCIAL SKILLS (Ratio 1:3)

- Floor Lay-Out
- Hand Tool Operation
- Installation Procedures
- Stair Building
- Wall Lay-Out

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



Training Proposal for: **Virgin Galactic, LLC**

Agreement Number: ET19-0130

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate HUA Veterans	Industry Sector(s):	Engineering Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Kern	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 145	U.S.: 163	Worldwide: 176
<u>Turnover Rate:</u>	12%		
<u>Managers/Supervisors:</u> (% of total trainees)	16%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$164,970		\$0	\$0		\$164,970

In-Kind Contribution:	100% of Total ETP Funding Required	\$214,500
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr., Haz. Materials	115	8-200	0	\$1,222	\$16.70
				Weighted Avg: 47			
2	Retrainee Veterans HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr., Haz. Materials	20	8-200	0	\$1,222	\$16.70
				Weighted Avg: 47			

Minimum Wage by County: Job Number 1: \$17.54 per hour for Los Angeles County and \$16.70 per hour for Kern County;

Job Number 2 (Veterans): \$16.70 per hour for Kern 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 & 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Engineer		20
Technician		25
Customer Service Staff		10
Administrative Staff		40
Manager/ Supervisor		20
Job Number 2 (Veterans)		
Engineer		4
Technician		12
Administrative Staff		2
Manager/Supervisor		2

INTRODUCTION

Founded in 2005, and headquartered in Mojave, Virgin Galactic, LLC (Virgin Galactic) (www.virgingalactic.com) designs, develops and manufactures commercial spaceships, carrier aircrafts and small satellite launch rockets. Virgin Galactic has two facilities in California (Mojave and Los Angeles).

Virgin Galactic's goal is to "define the future of space exploration" and ultimately make space-travel accessible. The Company plans to continue to leverage its development of a human spaceflight program, and bring low-cost satellite launch systems to realization. Virgin Galactic's customer base includes individuals, commercial satellite companies, universities and schools. The Company's mission is to be the spaceline for its 600 customers from more than 50 nations to have an opportunity to explore outer space.

This will be Virgin Galactic's second ETP Agreement, its second in the last five years. Training under this Agreement will only include trainees for Virgin Galactic at its Mojave and Los Angeles locations.

PROJECT DETAILS

Over the past two years, Virgin Galactic focused on manufacturing spaceflight vehicles. As the Company gets closer to completion of the manufacturing phase, it is focused on testing. In this proposal, training will focus on testing, spaceflight vehicle operation, maintenance, and attracting customers. The Company will also introduce new products and enhance business operations. In addition, the Company must keep up with technological advances, industry requirements and customers' expectations to remain competitive in the marketplace.

To support these changes and business operations, Virgin Galactic recently invested approximately \$7 million in new equipment and software programs, including routers, mission control, flight simulator, foreign object displacement, gauge tools, flight test software, learning management system and various testing machines and equipment. This involves extensive training to put new technology, processes and practices into place quickly and efficiently while maintaining superior quality standards.

Virgin Galactic's training goal is to provide workers with the necessary technical skills required to meet industry standards and customer specifications, including all requisite certifications, operate sophisticated spaceflight vehicles and systems while assuring customer safety.

ETP funding will allow Virgin Galactic to deliver upgraded job skills, provide knowledge to enhance productivity and services and adapt to new technologies and systems.

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 is designed to improve communication, product and service knowledge, project management and overall business operations. Trainees will learn to perform business-related tasks with greater efficiency and interact more effectively with internal and external customers.

Commercial Skills: This training will be offered to all occupations and assist trainees to handle various customers' and industry requirements and procedures.

Computer Skills: This training will be offered to all occupations. Training will help trainees to become more proficient in the use of various aircraft and business software solutions to provide efficient and effective customer services and tools to effectively perform their job functions.

Continuous Improvement: This training will be offered to all occupations and will ensure trainees have the skills to improve processes and maximize efficiency. Teambuilding, process improvement and quality improvement will help its workforce establish a culture of continuous improvement; and focus on working effectively within their teams and organization.

Hazardous Materials: This training will be offered to Engineers, Technicians, and Managers/Supervisors to ensure they are able to prevent hazards and/or address potential hazards exposure.

Commitment to Training

Virgin Galactic provides anti-harassment, diversity, basic computer skills, basic safety/OSHA, maintenance, operational, compliance, leadership training and new employee orientation training. Training is delivered via class/lab and on-the-job training. Virgin Galactic has a current annual training budget of approximately \$300,000 to train its workforce for both the Mojave and Los Angeles locations.

ETP funding will allow Virgin Galactic to create and implement new curriculum related to new products, services and technologies, and help build a stronger, more profitable company.

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 in-house staff and vendors if needed. Virgin Galactic has designated 15 staff, including a Director of Training to oversee training and all administrative responsibilities. Virgin Galactic will also utilize a third party administrator for enrollment, data tracking and invoicing.

Veterans Program

During the prior ETP Agreement, Virgin Galactic hired and trained 25 veterans. The Company continues working to attract more veterans through Job Fairs and other forms of outreach. Virgin Galactic will also include a veterans component in this project (Job Number 2). Virgin Galactic will train 20 veterans. The Panel has established a higher reimbursement rate and other incentives for training California veterans, as will be reflected in the contract.

High Unemployment Area

All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. However, Virgin Galactic is not asking for an HUA wage modification.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0377	Long Beach and Mojave	03/21/16 – 03/20/18	\$346,250	\$346,250 (100%)

DEVELOPMENT SERVICES

Virgin Galactic retained Training Funding Partners (TFP) in Fountain Valley to assist with development of this proposal for a flat fee of \$4,900.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Coaching
- Communication Skills
- Contract Administration
- Frontline Leader
- Goal Setting: Setting Intentional Goals
- Customer Care
- Logistics
- Media Relations
- Negotiation
- Procurement
- Product and Service knowledge
- Project Management
- Service & Contract Agreement (SA/CAs)
- Sustainability
- Time Management (Putting Productivity into Focus)

COMMERCIAL SKILLS

- Airport Operations/Procedures
- Aircraft Engines service and repairs
- Aircraft Surface Movement Guidelines
- ATF (Alcohol, Tobacco Firearms) Authorized Signers
- Confined Space
- Disaster Recovery
- Document Processes
- Equipment Operations and maintenance
- Emergency Operations
- Federal Aviation Administration Updates
- Foreign object debris (FOD)
- General Aviation
- Go Team
- Import/Export
- International Traffic in Arms (ITAR)
- Materials Handling
- Mechanical/Maintenance procedures
- Oxygen Bottle Servicing
- Part Numbers
- Respiratory systems
- Standard Operating procedures
- Supply Chain
- Tool use

COMPUTER SKILLS

- Airline Software
- Airline Procedure Manuals
- CAD
- Certify
- iDashboard
- Learning Management System (LMS)
- Microsoft Office
- Oracle
- OneLan
- Service Report Applications
- UM Maintenance
- UltraMain
- UltiPro
- Air Conditioning systems
- Airborne APU System
- Anti-Ice System
- Auto Flight
- Avionics
- Communication Systems
- Doors/Windows
- Electrical Power System
- Emergency Evacuation System
- Engine/aircraft inspection and repair
- Engine/generator maintenance/service
- Fire Protection
- Flight Control System
- Fuel tanks/System
- Hydraulic System
- Instruments
- Landing Gear
- Lighting Systems
- Navigation System
- Oxygen System
- Oxygen Generator Replacement
- Pilot procedures & operations
- Power Plants
- Pneumatic System
- Rigging
- Simulator Aviation
- Thrust Reversal Lockout
- Water & Waste System

CONTINUOUS IMPROVEMENT

- Process Improvement
- Quality Improvement
- Team Building

HAZARDOUS MATERIALS

- Hazmat Communication & Handling
- Nitrous Oxide

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

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



RETRAINEE - JOB CREATION

Training Proposal for:

Aspen Skilled Healthcare, Inc.

Agreement Number: ET19-0128

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Medical Skills Training Job Creation Initiative Priority Rate SET HUA	Industry Sector(s):	Healthcare Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, Fresno, Los Angeles, Marin, Orange, Santa Clara, San Joaquin	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 2,271	U.S.: 2,271	Worldwide: 2,271
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$292,344		\$0	\$0		\$292,344

In-Kind Contribution:	100% of Total ETP Funding Required	\$606,236
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Medical Skills Training SET Priority Rate	Computer Skills, Continuous Improvement, Literacy Skills, MST-Didactic, MST-Preceptor	176	8-200	0	\$624	\$22.77
				Weighted Avg: 24			
2	Retrainee Medical Skills Training SET Priority Rate Job Creation Initiative	Computer Skills, Continuous Improvement, Literacy Skills, MST-Didactic, MST-Preceptor	26	8-200	0	\$4,290	*\$13.66
				Weighted Avg: 165			
3	Retrainee Medical Skills Training SET Priority Rate HUA	Computer Skills, Continuous improvement, Literacy Skills, MST-Didactic, MST-Preceptor	105	8-200	0	\$676	*\$12.53
				Weighted Avg: 26			

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

Minimum Wage by County: Job Number 1: \$22.77 per hour for Statewide Average Wage (Priority Industry).

Job Number 2 (Job Creation): \$15.18 per hour for Alameda, Santa Clara, and Marin Counties; \$14.62 per hour for Los Angeles County; \$14.58 per hour for Orange County; \$13.66 per hour for San Joaquin and Fresno Counties.

Job Number 3 (HUA): \$12.53 per hour for 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

\$1.53 per hour may be used to meet the Post-Retention Wage for Job Number 3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Registered Nurse		50
Licensed Vocational Nurse		84
Certified Nursing Assistant		25

Therapist/Therapist Assistant		17
Job Number 2		
Registered Nurse		26
Job Number 3		
Registered Nurse		5
Licensed Vocational Nurse		5
Certified Nursing Assistant/ RNA		95

INTRODUCTION

Founded in 2009, Aspen Skilled Healthcare, Inc. (Aspen) offers nursing and rehabilitative senior care at Aspen healthcare facilities throughout California. Aspen Skilled Healthcare 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 listed below. This will be Aspen's first ETP Agreement.

- Stonebrook Health and Rehabilitation-Los Gatos
- Woodlands Healthcare Center-Los Gatos
- Mission Palms Healthcare Center-Westminster
- Sierra Vista Healthcare-Fresno
- Tracy Nursing and Rehabilitation Center-Tracy
- Riverwood Healthcare Center-Stockton
- Oakland Heights Nursing and Rehabilitation-Oakland
- Marina Pointe Healthcare & Sub Acute Culver City
- Lodi Nursing and Rehabilitation-Lodi
- Kei-Ai Los Angeles Healthcare Center- Los Angeles
- South Marin Health and Wellness Center-Greenbrae

Over the last eight years', regulatory change in the healthcare industry has remained constant with over 500 edits to regulatory language, and new revisions that center on staff training and competency. Challenges faced by Aspen include new quality standards, reimbursement structures based on quality metrics, targeted reduction in hospital readmissions, an increase in patient population, a shortage of skilled healthcare workers, and a higher number of patients being released prematurely from acute care hospitals. These revisions were designed to improve the patient's quality of life, care, safety, and professional standards among healthcare facilities.

PROJECT DETAILS

Aspen has implemented processes to meet new provisions and mandates such as Senate Bill 97. This bill requires healthcare facilities to meet staff-to-patient ratios for direct caregivers, increasing the number of registered nurses and certified nursing assistants per location. Effective July 1, 2018, this bill will require skilled nursing facilities to meet the minimum number of 3.5 direct care service hours a day per patient. Additional provisions/mandates include a final rule released by the Centers for Medicare and Medicaid (CMS) that updated the Conditions of Participation in the Medicare and Medicaid programs for long term care facilities, which call for a phased in implementation process. Over the next three years, Aspen facilities will spend an annual amount of \$62,000 per facility to come into compliance with CMS.

Additional regulations have been issued that will also require Aspen facilities to develop, implement, and maintain an effective, comprehensive, and data-driven Quality Assurance/Performance Improvement program (QAPI). QAPI focuses on the indicators and outcomes of patient care and quality of life. The facility must maintain documentation regarding QAPI, and explain how their program meets these requirements. The QAPI program must:

- Address all systems of care and management practices;
- Include clinical care, quality of life, and resident choice;
- Utilize the best available evidence to define and measure indicators of quality and facility goals that reflect processes of care and facility operations that have shown to be predictive of desired outcomes; and
- Reflect the complexities, unique care and services the facility provides.

Training will ensure successful implementation of new healthcare standards, and improve Aspen nursing skills and patient care. Certified Registered Nurses will receive training in Minimum Data Set requirements which is a data collection process to conform to CMS regulations regarding patient care and facility reimbursement from the Centers for Medicare and Medicaid. Curriculum content will also include the following; communication skills, dementia management, resident abuse prevention, the rights of residents, and participation in the QAPI program.

This training plan will also implement a new initiative aimed to promote and measure the use of appropriate antibiotic use. The use of antibiotics is an important factor in the development of antimicrobial resistance. Training will be provided to increase staff knowledge on appropriate agent, dose, duration, and route of administration of antimicrobial agents in order to improve patient outcomes while minimizing adverse events that may include toxicity. This initiative will improve the quality of patient care and safety, and will also reduce excessive costs attributable to inappropriate microbial use.

Training Plan

Trainees will receive 8-200 hours of training over 21 months under this Agreement. Training will teach staff new processes and changes in compliance with CMS regulations that include patient care and readily accessible report outcomes. Training will be delivered by in-house instructors.

Computer Skills: Training will be offered to all occupations to ensure staff can readily utilize the company's electronic medical record keeping system (EMRS). Training will include software updates and retrieving patient information via EMRS.

Continuous Improvement: Training will be offered to all occupations to improve employee communication skills, quality improvement, and documentation skills.

Literacy Skills: Training will be offered to trainees in all occupations who speak English as a second language. Training will improve staff's ability to communicate with patients and Aspen staff (co-workers) effectively.

Medical Skills Training-Didactic: This training will be offered to all occupations to increase medical staff knowledge and capabilities to provide quality patient care. Medical Skills training will be provided to nursing staff to ensure staff follow advanced clinical processes. Curriculum entails content on patient care, safety, and assessment, respiratory care, wound management, dementia care, and infection control. Skills attained will include specialty care provided to the elder population.

Medical Skills Training-Preceptor: This training will be offered to all occupations to ensure medical staff can provide hands-on assistance to patients, as well as demonstrate they can perform medical related tasks. Nurses will receive one-on-one training to ensure competency, as

well as demonstrate medical staff can assist patients with medical tasks such as ventilator and tracheotomy care, wound care, pneumonia, congestive heart failure, behavior testing, and cardiovascular changes.

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.

Aspen has committed to hiring 26 new Registered Nurses (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 will prepare staff to successfully transition into a fast paced care environment and prepare Registered Nurses with standardized skill sets to provide safe patient care.

Medical Skills training will include extensive classroom and clinical training to ensure nurses are able to provide medical care to patients that are in line with regulatory mandates and standards of Aspen. This program will help new nurses transition into a long term care environment. Some new nurses may receive up to 200 training hours under this training project. It is estimated that Aspen will spend approximately \$12,000 per nurse to recruit, hire, and provide training.

Commitment to Training

Aspen spends approximately \$50,000-\$75,000 annually on training per facility in California. Aspen facilities will continue to provide new hire orientation, in-services, sexual harassment prevention, and computer skills training. Training delivered to staff is company-wide, job specific, and mandatory.

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 Vice President of Compliance (VP) and Director of Clinical Services (DCS) will oversee of this training program. Each facility will designate their Director of Staff development at each facility to administer training and documentation, and assign one internal person as the main point of contact reporting to the VP and DCS. The Company has also hired National Training Systems, Inc. (NTS) to aide in the administration of the ETP training program. NTS will upload all trainee enrollment information, collect training data, and ensure ASPEN is in compliance with ETP record keeping requirements. Aspen has a training schedule in place and is ready to begin training upon approval.

Special Employment Training

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period. However, trainees employed in a Priority Industry qualify for a wage modification up to 25% below the statewide average hourly wage. Aspen is requesting the wage modification from \$30.36 to \$22.77 for trainees in Job Number 1 and \$13.66 for Job Number 2.

High Unemployment Area/Wage Modification

The 105 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 Company's locations in Fresno and San Joaquin Counties qualify for HUA status under these standards.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Aspen retained National Training Systems, Inc. (NTS) in Ladera Ranch to assist with development of this proposal for a flat fee of \$14,617.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

COMPUTER SKILLS

- Electronic Medical Records Application Skills
- Electronic Tablet for Bedside Charting
- Omnicell

CONTINUOUS IMPROVEMENT

- Administration
- Medical Records
- Customer Service
- Communication Skills
- Compliance
- Conflict Resolution
- Cultural Sensitivity Training
- Director of Nursing Huddles
- Problem Analysis and Problem Solving
- Clinical Services System Management
- Interdepartmental Collaboration
- Interdisciplinary Team
- Incident/Accident Management
- Person Centered Care
- Mobility Skills
- Documentation
- Continuous Quality Improvement Workshop
- Culturally Appropriate Care
- Team Building
- The Five Star Rating System
- QAPI Process (Quality Assurance/Performance Improvement)

LITERACY SKILLS

- Vocational English

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

MEDICAL SKILLS-DIDACTIC

- ABT Stewardship
- Annual Skills Update
- Building Respect for LGBT Older Adults
- Infection Control
- Basic Life Support

- Bedrail QR Coding
- Bedrail Use and Safety
- Body Mechanics
- Blood Glucose Testing
- Behavioral Health Skills
- Patient Transfer Techniques
- Equipment Skills (Pumps, Vital Monitoring Devices, Support Systems, Etc.)
- Advanced Cardiac Life Support
- Change of Condition Management
- Interdisciplinary Team Process
- Pain Management (Acute and Chronic)
- Intravenous Therapy
- Enteral Feeding Tube Management
- Respiratory Care
- Restorative Nursing
- Wound Management
- Diabetic Management
- Urinary Management (Foley catheter, input/output)
- Resident and Family Education
- Medication and Administration Management
- Medication Monitoring
- Restraint and Restraint Reduction
- Behavior Management
- Psychotropic Medication Management
- Patient Assessment & Care
- Physical, Occupational, Speech Therapy
- End of Life Care
- Patient Fall Prevention
- Dementia/Alzheimer's
- Neurovascular System
- Safe Injection Training
- Residents with Special Needs
- Gastrointestinal System
- Laboratory
 - Electrolyte Imbalance
 - Arterial Blood Gas Interpretation
- Cardiac Conditions
- Neurological Conditions
- Resident Emergency Response
- Skeletal/Orthopedic Conditions
- Incontinence Management (colostomy care, urinary catheter care)

MEDICAL SKILLS TRAINING-PRECEPTOR

- **Inpatient & Outpatient Care Unit**
 - Medication Management/Black Box Warnings
 - Advanced Assessment Skills

- Advanced Clinical Skills
- Infection Control
- Patient Safety
- Bedrail QR Coding
- Bedrail Use and Safety
- Clinical Skills Review
- Clinical Certification Skills
- Patient Assessment and Care
- Intravenous Therapy
- Enteral Management (Bolus, Intermittent, Continuous)
- Feeding Tube (Insertion, Site Care, Removal)
- Dementia Care
- Assessing of Tube-Fed Individuals with Diabetes Mellitus
- Preventing and Identifying Complications (related to tube feedings)
- Respiratory Care
- Wound Management
- Safe Injection Training
- Hemovac/Pnuemovac
- Dementia/Alzheimer's
- Managing Patients w/ Neurovascular Conditions
- Residents w/Special Needs
- Gastrointestinal Conditions
- Cardiac Conditions
- Skeletal/Orthopedic Conditions
- Incontinence Management (colostomy care)
- Assisting and Performing Self-Care Skills
- Functional Mobility and Ambulation
- Bowel and Bladder Training of Patients
- Identification of Skin Impairments and Prevention
- Identification of Patient Change in Condition
- Monitoring of Cardiovascular Changes (Vital signs, endurance, level of consciousness)
- Breathing Patterns and Respiratory Function
- Pain Management
- Positioning of Patients for Correct Body Alignment
- Monitor Blood Pressure of Patients
- Operate Safety Devices w/ Patients
- Activities of Daily Living
- Conduct Range of Motion Exercises w/Patient
- Patient Care of Foot and Hand
- Infection Control
- Charting
- Colostomy Care
- Hazardous Waste Handling
- Isolation Techniques
- Safe Patient Handling
- Use of the Call Light System
- Safe Linen Handling

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



TRAINING PROPOSAL FOR
General Mills Operations, LLC
17-0882

Panel Meeting Date: 06/22/2018
Regional Office: North Hollywood Regional Office
Analyst Name: Monique Webb
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

Provided here is a summary of the funding for the proposed Training Project.

TOTAL ETP FUNDING: \$ 388,830.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 388,830	N/A	N/A	\$ 415,291.00

APPLICANT PROFILE

Company Summary	General Mills Operations, LLC produces General Mills yogurt products/brands that are distributed nationwide.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 422	US: 13707	World Wide: 38245
Turnover Rate (Applicant)	5.00 %		
Repeat Contractor	Yes		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training provided will introduce staff to computer software upgrades, as well as train newly hired workers in Manufacturing Skills to efficiently operate General Mills equipment. Cross-training will also be provided to ensure Production Staff can operate multiple production lines (setup, troubleshoot, and maintenance).
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	97	\$ 26.00	60	\$ 1560	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	87	\$ 26.00	105	\$ 2730	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

General Mills Operations, LLC (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 only occur at the Carson location. This will be General Mills' tenth ETP Agreement, and third within the last five years. This will be General Mills' fifth Agreement at the Carson location.

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	<p>General Mill's Carson facility has continued to add new product-lines to utilize new technology and newly purchased equipment. The Company's prior ETP contract provided training to a single production department. General Mills hired new Technical Operators and Reliability Technicians who received extensive technical skills, leadership and continuous improvement methodologies training. No trainee will receive duplicate training under this training project.</p> <p>To remain efficient and increase production, training will be delivered to multiple departments for incumbent and newly-hired workers. Training will ensure employees are current on new production processes and can operate new equipment in a safe and proficient manner. Productive Lab training (PL) will be provided to teach staff proper steps in inspection and equipment maintenance. Trainees may receive up to 60 hours of PL training at a 1:2 trainer-to-trainee ratio. Based on instructor's availability, General Mills has found that training in groups of 2 is more efficient and ensures time is spent adequately without additional interruption into the production process. In addition, training in groups of two is also based on the instructor's availability on various shifts at the Carson location. Under the direction of a supervisor/instructor, workers will demonstrate they can complete job tasks assigned, following all operating procedures for processing and packaging equipment. Trainees to receive PL training include Processing, Material Handling, and Maintenance Operators.</p> <p>Business Skills and Continuous Improvement training will also be provided to all occupations to improve employee relations, team building, and communication skills. Training will enhance staff's ability to problem solve, increase project management skills, properly analyze a job task assigned, and learn new upgrades to computer software programs. Training will be delivered by in-house instructors.</p> <p>Retrainee - Job Creation</p> <p>The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a</p>
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PROPOSED TRAINING PROJECT DETAILS

	<p>higher rate, and trainees will be subject to a lower post-retention wage.</p> <p>General Mills has committed to hiring 87 new employees (Group Number 2). The facility will expand existing business capacity by adding new production lines at the Carson location. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. Occupations include Operators and Technicians. Staff will receive Manufacturing Skills training to ensure workers are able to operate machinery and provide maintenance as needed. Training will include PL and Class/Lab instruction. These trainees will be hired into “net new jobs” as a condition of contract.</p>
Training Infrastructure and Administrative Plan	General Mills has assigned three Human Resource (HR) employees to design curriculum, schedule training, enroll trainees, perform all data entry, and coordinate with ETP Staff to ensure the Company is in compliance with ETP regulations. These HR Staff have ETP experience from prior ETP Agreements. The Company’s Training Coordinator will oversee all administration duties for this Agreement.
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.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Trainees will receive Business, Computer, Continuous Improvement, Commercial, and Manufacturing Skills training delivered through Class/Lab (Attachment 2).	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
Trainees will receive Manufacturing Skills training delivered through E-Learning (Attachment 2).	

Delivery Method/Level	Productive Laboratory
Summary	
Trainees will receive Manufacturing Skills training delivered through Productive Lab (Attachment 2).	

PROPOSED TRAINING PROJECT DETAILS

4. Additional Company or Training Project Details

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

The table below summarizes the active performance under the ETP contract.

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET16-0222	Carson	11/01/15-10/31/17	\$155,104	\$155,104	100%
ET14-0199	Carson	10/28/13-10/27/15	\$137,000	\$137,700	100%
Notes:	Given the successful performance of the active project, and given the expanded need for and scope of proposed training, the amount of this proposal exceeds the prior contract.				

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.

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Building Positive Employee Relations
	Coaching and Feedback
	Corrective Action
	Interpersonal Skills
	Leadership Skills
	Organization & Efficiency Skills
	Problem-Solving
	Project Management
	Strategic Communications
	Strategy Development
	Teambuilding
Commercial Skills (Standard)	Welding
Computer Skills (Standard)	Human Machine Interface (HMI)
	Manufacturing Quality Information System
	Maximo
	Microsoft Office
	Red Prairie
	SAP
	Scheduling Software (Workbrain)
Continuous Improvement Skills	5S
	Assessment/HOD
	Autonomous Maintenance
	Breakdown Elimination
	CIL (Clean, Inspect, Lube)
	Daily Direction Setting
	Defect Handling
	FMEA (Failure Modes Effects Analysis)
	Foundational Systems
	Glide Path/Loss Tree Analysis
	Job-Task-Analysis
	Maintenance Planning & Scheduling
	One Point Lesson Development
	Organizational Effectiveness
	Problem-Solving
	Process Centerline
	Process Improvement
	Quick Changeovers
	Reliability Technology
	Specialized Maintenance
	System Performance Training
	Vertical Startup Training

Attachment 2 - Training Delivery and Curriculum Listing

Provided below are details on the types of training planned for this proposed Training Project.

Manufacturing Skills (ME) (Standard)	Case Coders
	Controls & Electrical
	Drives Systems
	Electrical Components
	Equipment Components
	Fanuc Robotics
	Fasteners
	Food Safety Training
	General Equipment Inspection
	General Process Inspection
	Good Manufacturing Practices
	Heating, Ventilation & Air Conditioning
	Hydraulics
	Instrumentation
	Lubrication
	Machining
	Mechanical Skills Training
	Motion Systems
	New Product Implementation & Production
	New Production Processes
	Pneumatics
	Preventative Maintenance
	Programmable Logic Controllers (PLCs)
	Pumps
	Sanitation Training
	Shop and Hand Tools
	SIP (Steam in Process) Training
	Sustainability Initiatives
	Technical Skills Overview
	Theory of Operation
	Transmissions Systems
	Troubleshooting
	Valves
	Variable Frequency Drives (VFDs)
	Wonderware

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Manufacturing Skills (ME) (Standard)	RT 1.1 Tools, Measurement, Lube & Math	10.00
	RT 1.2 Fasteners & Mechanical	22.00
	RT 1.3 Pneumatic & Electrical	10.00
	RT 2.1 Machining	15.00
	RT 2.2 Electrical	4.00

Attachment 2 - Training Delivery and Curriculum Listing

Provided below are details on the types of training planned for this proposed Training Project.

	RT 3.1 Electrical	7.00
	RT 4.1 Electrical	35.00
	T-OP 1.1 Tools, Measurement, Lube & Math	14.00
	T-OP 1.2 Fasteners & Mechanical	22.00
	T-OP 1.3 Pneumatic & Electrical	2.00
	T-OP 2.1 Machining & Fabrication	10.00
	T-OP 2.2 Mechanical & Electrical	7.00
	T-OP 3.1 Mechanical	7.00
	T-OP 3.2 Pneumatic Troubleshooting	2.00
	T-OP 3.3 Electrical	6.00
	T-OP 3.4 Rigging	2.00
	T-OP 3.5 Machining	14.00

Delivery Method /Level	Productive Laboratory		
Training Type (Level)	Planned Course Offerings		
Manufacturing Skills (ME) (Standard)	Maintenance Training		
	Material Handling Training		
	Packaging Equipment Training		
	Processing Equipment Training		
	Utilities Equipment Training		
PL Justification and Details			
Explain the need for productive laboratory (PL) training	We believe that Productive Lab is the most effective training method due to the focused interaction achieved through minimal trainer-to-trainee ratio. The job titles include Processing, Packaging, Material Handling and Maintenance duties.		
Describe the Equipment/Processes to be used in delivering the PL training	Processing Equipment: HTSTs, Milk Receiving, Batching Systems, Fermentation Systems and CIP systems. Packaging: Filing Systems, Cup Forming, Tube Forming, Case Loading, Case Sealing, Metal Detection Systems and Coding Systems. Material Handling: Automatic Storage & Retrieval Systems, Conveying Systems, Palletizing Systems, Inventory Control Systems, Powered Industrial Trucks and Recycling Systems. Maintenance: Packaging Equipment, Processing Equipment, Material Handling Equipment, Control		
Describe Trainer Qualifications	All trainers have been verified subject matter experts. Each is certified in their specific job title. Trainers complete a course on how to deliver effective training following our standard processes.		
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio		Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class		1	1
Ratio for Maximum Ratio When More than One Class		1	2
PLT Approval	Yes		



RETRAINEE - JOB CREATION

Training Proposal for:

Pandora Media, Inc.

Agreement Number: ET19-0139

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: M. Paccereilli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Technology/IT Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Alameda	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 1,800	U.S.: 2,000	Worldwide: 2,488
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	20%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$749,320		\$0	\$0		\$749,320

In-Kind Contribution:	100% of Total ETP Funding Required	\$1,725,855
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Advanced Tech, Computer Skills, Business Skills	800	8-200	0-100	\$884	\$17.54
				Weighted Avg: 34			
2	Retrainee Priority Rate Job Creation Initiative	Advanced Tech., Computer Skills, Business Skills	27	8-200	0-100	\$1,560	\$16.00
				Weighted Avg: 60			

Minimum Wage by County:

Job Number 1: \$17.54 per hour in Los Angeles County, \$18.22 per hour in Alameda County
 Job Number 2: \$14.62 per hour for Los Angeles County, \$15.18 per hour in Alameda County

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

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

Job Number 1: Up to \$1.54 per hour may be used to meet the Post-Retention Wage in Los Angeles County and up to \$2.22 per hour in Alameda County

Job Number 2: Although employer provides health benefits, they are not being used to meet the Post Retention Wage

Job Numbers 1 & 2 Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Advertising Operations/Account Manager		182
Business Support Staff		70
Design & Audio Designer/Producer		30
Engineer/Scientist		50
Marketing/Business Development Staff		100
Music Operations Staff		30
Product Management Staff		60
Sales Staff		60
Strategic Solutions Staff		30
Technical Operations/Information Technology (IT) Staff		50
Manager/Supervisor		165

INTRODUCTION

Pandora Media, Inc. (Pandora) (www.pandora.com) 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.

As a powerful music discovery platform, Pandora offers a personalized experience for each of its listeners wherever and whenever they want to listen to music – whether through earbuds, car speakers or live on stage. Its vision is to be the definitive source of music discovery and enjoyment for billions.

Unlike traditional radio stations that broadcast the same content at the same time to its listeners, Pandora enables each of its listeners to create personalized stations. The Music Genome Project and its content programming algorithms power its ability to predict listener music preferences, play music content suited to the tastes of each individual listener and introduce listeners to music Pandora thinks they will love. Training will be provided at Pandora's locations in Santa Monica and Oakland.

Retrainee - Job Creation

The internet industry is competitive and rapidly changing. Pandora is expanding its business capacity, adding new employees to existing functions in sales, administrative, financial, and technology teams. Pandora is committed to hiring and training 27 new employees (Job Number 2) to develop new ideas, provide better service to users, and support internal staff.

Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Newly hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage. Trainees will be hired into "net new jobs" as a condition of contract.

PROJECT DETAILS

This will be Pandora's second ETP Agreement. Pandora had a conservative training plan in its first contract. The training was designed to enhance Pandora's competitiveness and ensure employees perform optimally.

In this proposal, Pandora will be able to expand the scope of training to a larger trainee population. Given the successful performance of the last contract and expanded scope of the proposed training, the amount of this proposal exceeds the prior contract.

The training will also support its new product offerings that were launched since the last contract such as *Pandora Plus* and *Pandora Premium*. With the rapid advancement of technology and new innovations being discovered, Pandora keeps current with industry demands and is constantly refining its technology and expanding the platform it supports. Pandora must have an efficient workforce skilled across many platforms and different types of technologies so it can develop the best solutions and experiences for its users.

Training Plan

Business Skills - Training will be offered to all occupations to help improve their product development skills and equip them with effective communication, decision-making, and goal-setting skills. Training will focus on customer solutions, quality processes, sales and marketing, and competitive product, market, and technology knowledge.

Computer Skills - Training will be offered to all occupations to provide the skills beyond the basics of each application and take advantage of each application's features to improve productivity and efficiency.

Advanced Technology (AT) - Training will be offered to Technical/IT Staff, Designers, Scientists, and Engineers. These trainees need advanced skills to get ahead of the technology curve. As a digital technology company in an intensely competitive marketplace, Pandora must have a technical workforce skilled to manage its platform and develop the best solutions and experiences for its users.

AT will be delivered in highly technical learning environments, including special curricula, instructors and training labs. The costs for delivering AT training range from \$50 to \$80 per trainee hour, plus hardware, software, and setup costs. Some classes will be configured on a special network environment to simulate real-world scenarios. The trainer-to-trainee ratio is 1:10 to allow for in-depth coverage and personal attention from the instructor.

Learning Management System

Pandora uses a Learning Management System to manage all training hours for employees. The system meets all ETP requirements and has been approved by staff to be used for ETP recordkeeping.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. In support of continuous employee development, Pandora's current training budget is approximately \$1M and covers general skills training, new-hire orientation, legally mandated training, 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

Pandora has a detailed training schedule in place and is ready to roll out training upon Panel Approval. Pandora's Learning & Development Team will oversee the training and internal project administration. Training will be provided by in-house trainers who are subject matter experts. The Company has a well-established training platform and internal administrative procedures using its own Learning Management System that provides standardization, enrollment, training, and tracking services. In addition, Pandora has retained an outside administrative consultant to ensure that all training records meet ETP compliance.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0144	Los Angeles, Oakland	12/30/15 – 12/29/17	\$249,600	\$249,600 (100%)

DEVELOPMENT SERVICES

Pandora retained The Enterprise U in Santa Monica to assist with development of this proposal for a flat fee of \$5,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- + Analytics Training
- + Appreciating Our Differences
- + Audience Analysis & Listener Experience
- + Broadcast Basics
- + Business Analysis & Business Intelligence
- + Competitive Product, Market, & Technology Knowledge
- + Creating a Culture of Innovation & Execution
- + Creative Thinking and Problem Solving
- + Customer Service
- + Customer Solutions
- + Effective Communication (Written and Verbal)
- + Effective Decision-Making
- + Effective Goal-Setting
- + Emotional Intelligence
- + Ensuring Quality Processes
- + Financial Fundamentals
- + Interpersonal Skills
- + Knowledge Management
- + Leading Effective Meetings
- + Leadership Skills
- + Managing Time and Priorities
- + Mobile Processes and Guidelines
- + Navigating Through Change
- + Negotiating Skills
- + Organizational Development Imperatives
- + Partner Quality and Compliance
- + Powerful Presentation Skills
- + Project Management
- + Risk Mitigation and Risk Review
- + Sales & Marketing Tools and Techniques
- + Strategic & Innovative Thinking
- + Teambuilding

COMPUTER SKILLS

- + Intermediate & Advanced Microsoft Office Suite & Data Tools
(Word, Excel, Outlook, PowerPoint, Access, Project)
- + Graphics Applications and Web Programming Tools

ADVANCED TECHNOLOGY*(For Technical Operations/IT, Designers, Scientists and Engineers only)*

- + Agile Developer Essentials
- + Android Programming
- + Apache Hadoop
- + Be Agile
- + C Programming
- + Cascading Style Sheets

- + Certified Scrum Master
- + Certified Scrum Product Owner
- + Cisco
- + Continuous Integration Build Pipeline
- + Django
- + Engineering U
- + Geek Week
- + GitHub
- + HTML
- + iOS
- + ITIL
- + Java Performance Tuning
- + JavaScript
- + Kanban for Development and IT/OPS
- + Mojito
- + Multiplatform Programming
- + Network Security
- + Ninjaneering workshop: Clean Code Practices
- + Node.js
- + Oracle / Essbase
- + Perl Essentials
- + PHP Essentials
- + Pig Development
- + Python
- + RHEL Performance Tuning
- + Ruby
- + Service Oriented Architecture
- + Software Lifecycle Methodologies (UML, Agile, Scrum)
- + SQL
- + Testing and Refactoring (C++, Java, Javascript)

CBT Hours

0 – 100

COMPUTER BASED TRAINING (CBT)**BUSINESS SKILLS**

- + Activity Guide (1)
- + AdTech (1)
- + Ad Products (1)
- + Advertiser and Agency Growth (1)
- + All Things Creative (1)
- + Amplified Solutions (1)
- + Analytics (1)
- + Answer Key (1)
- + ARIA (1)
- + Audience Explorer (1)
- + Audience Monetization (1)
- + Audience Verification (1)
- + Audio 101 (1)
- + Billing (1)
- + Booking Analysis (1)
- + Boot Camp (1)
- + Brainstorming (1)
- + Broadcast (1)
- + Browsing (1)

- ✚ Building Playlists (1)
- ✚ Buyer Story (1)
- ✚ Campaign Insights (1)
- ✚ Check-in Conversations (1)
- ✚ Client Communications (1)
- ✚ Client Data (1)
- ✚ Cloud Computing (1)
- ✚ Cloud Services (1)
- ✚ Communication Styles (1)
- ✚ Competitive Product, Market, & Technology Knowledge (1)
- ✚ comScore (1)
- ✚ Contextual Targeting (1)
- ✚ Core Narrative (1)
- ✚ Creative Creation (1)
- ✚ Creative Problem Solving (1)
- ✚ Custom Station (1)
- ✚ Delivering Your Upsell (1)
- ✚ Design 101 (1)
- ✚ Design Thinking (1)
- ✚ Developing Your Presentation Style (1)
- ✚ Digital 101 (1)
- ✚ Digital 201 (1)
- ✚ Digital Media Sales (1)
- ✚ Dynamic Display (1)
- ✚ Email, Phishing, and Messaging (1)
- ✚ Employee Story (1)
- ✚ Engineering U (8)
- ✚ Episodes (1)
- ✚ Exporting and Viewing Reports (1)
- ✚ Facilitation (1)
- ✚ Finance Knowledge (1)
- ✚ Foundations (1)
- ✚ Freshman Year (8)
- ✚ Gear Up Week (8)
- ✚ Go Sell (1)
- ✚ Growth and Development (1)
- ✚ Hacked (1)
- ✚ How We Set Goals (1)
- ✚ Information Security (1)
- ✚ Insertion Orders (1)
- ✚ Inside Sales (1)
- ✚ Integrity (1)
- ✚ Junior Year (1)
- ✚ KPIs (1)
- ✚ Leading (8)
- ✚ Marketing Funnel (1)
- ✚ Media Plans (1)
- ✚ Mobile Device Security (1)
- ✚ Multicultural Opportunities (1)
- ✚ Network for Development (1)
- ✚ Nielsen (1)
- ✚ Opportunity Creation (1)
- ✚ Organizational Influence (1)


- ✦ Own the Room (1)
- ✦ Own Your Network (1)
- ✦ Pandora Games (1)
- ✦ Pandora Privacy and Data Security (1)
- ✦ Pandora U (8)
- ✦ Performance Improvement (1)
- ✦ Performance Management (1)
- ✦ Performance of a Lifetime (1)
- ✦ Persuasion and the Power of Story (1)
- ✦ Physical Security (1)
- ✦ Pipeline Analysis (1)
- ✦ Playback & Discovery (1)
- ✦ Presentation Skills (1)
- ✦ Process Overview (1)
- ✦ Product Summit (1)
- ✦ Products 101 (1)
- ✦ Products 102 (1)
- ✦ Professional Communication (1)
- ✦ Programmatic Messaging (1)
- ✦ Project Management (1)
- ✦ Protecting Confidential and Sensitive Data (1)
- ✦ Public Speaking (1)
- ✦ Radio 101 (1)
- ✦ Reach & Frequency (1)
- ✦ Retargeting (1)
- ✦ Revenue Operations (1)
- ✦ Sales, Marketing & PR (1)
- ✦ Sales Partners (1)
- ✦ Sales Power Hour (1)
- ✦ Sales Research (1)
- ✦ Sales Training (8)
- ✦ School of Classical (1)
- ✦ School of Country (1)
- ✦ School of Disco (1)
- ✦ School of Hip Hop (1)
- ✦ School of Jazz (1)
- ✦ School of Motown (1)
- ✦ School of Pop (1)
- ✦ School of Punk (1)
- ✦ School of Rock (1)
- ✦ Searching Content (1)
- ✦ Social Engineering (1)
- ✦ Sophomore Year (8)
- ✦ Sponsored Listening (1)
- ✦ Storytelling (1)
- ✦ Strategy Sheet (1)
- ✦ System Guide & FAQ (1)
- ✦ Targeting (1)
- ✦ User Story (1)
- ✦ Video Ads (1)
- ✦ Viewability (1)
- ✦ What Motivates Us (1)
- ✦ Working Remotely (1)

 Workflows (1)

COMPUTER SKILLS

 Captivate (1)

 PowerPoint (1)

 Keyboard Shortcuts for PowerPoint (1)

 Salesforce Basics (1)

<p>Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.</p>
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Training Proposal for:
Reliant Management Group, LLC
Agreement Number: ET19-0138

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee SET Priority Rate Medical Skills Training HUA	Industry Sector(s):	Healthcare Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno, Los Angeles, Marin, Riverside, Santa Clara, Sonoma, Stanislaus	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No SEIU 2015		
Number of Employees in:	CA: 1,296	U.S.: 1,296	Worldwide: 1,296
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$437,580		\$0	\$0		\$437,580

In-Kind Contribution:	100% of Total ETP Funding Required	\$637,500
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Medical Skills	MS-Didactic, MS-Preceptor, Computer Skills, Cont. Imp.	605	8-200	0	\$468	\$22.77
				Weighted Avg: 18			
2	Retrainee SET Medical Skills HUA	MS-Didactic, MS-Preceptor, Computer Skills, Cont. Imp.	330	8-200	0	\$468	*\$12.53
				Weighted Avg: 18			

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

Minimum Wage by County: Job Number 1 (SET/Priority Industry): \$22.77 per hour

Job Number 2 (SET/HUA): \$13.25 per hour for Los Angeles County; and \$12.53 per hour for Fresno and Stanislaus counties

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

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

Up to \$2.27 per hour (Job Number 1) and \$1.53 per hour (Job Number 2) may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Registered Nurse		147
Licensed Vocational Nurse		458
Job Number 2 (HUA)		
Certified Nurse Assistant		330

INTRODUCTION

Founded in 2014 and headquartered in Paramount, Reliant Management Group, LLC (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.

In addition to the headquarters location, there will be nine Reliant affiliates participating in this proposal as follows:

- All Seasons Healthcare, Inc. in Paramount
- California Post-Acute Care, LLC in Lynwood
- Fresno PostAcute Care, LLC in Fresno
- Riverside PostAcute Care, LLC in Riverside
- Northgate PostAcute Care in San Rafael
- Camden PostAcute Care, Inc. in Campbell
- Vista Del Sol PostAcute Care in Turlock
- Santa Rosa PostAcute Care, LLC in Santa Rosa
- Hospice of Saint John, Inc. in Burbank

Union

The CNAs and LVNs at the Fresno and Northgate facilities are under a collective bargaining agreement with SEIU Local 2015 and a letter of union support was provided to ETP.

PROJECT DETAILS

Reliant is experiencing a rapidly changing business environment due to regulatory reform, new quality standards, and an increasingly aging patient population. The Company needs to train its workers in response to ongoing regulatory changes resulting from the Affordable Care Act, and new operating requirements, Conditions of Participation from the Centers for Medicare and Medicaid (CMS). Additional industry factors impacting Reliant's business include competitive pricing of services, increased patient acuity, increased transparency rules, and the continued focus on reducing readmissions.

The proposed training will help Reliant strengthen its education and skills development programs, continue to rollout industry-driven initiatives, and equip staff with the requisite skills to deliver optimal patient care. CMS-related training initiatives will include Quality Assurance and Performance Improvement (QAPI), Infection Prevention and Control, and Psychotropic Drug Guidelines.

Training Plan

Training will be delivered via class/lab in the following:

Medical Skills: Training will be offered to all occupations in advanced clinical processes such as patient assessment and care, respiratory care, wound management, dementia care, rehabilitation aide skills, and managing patients with neurovascular disorders. These modules are intended to ensure employee competency, as well as patient satisfaction and safety.

Computer Skills: Training will be offered to all occupations in Electronic Medical Records software updates to ensure the accurate entry and retrieval of patient information.

Continuous Improvement: Training will be offered to all occupations to improve skills such as team building, communication skills, documentation, customer service, standard operating procedures, QAPI process, and problem solving.

Alternate Retention

Healthcare workers are non-customary workers eligible for full time employment and retention modifications. Reliant is requesting to modify the definition of full-time employment from an average of 35 to 30 hours per week in a 90-day period. Additionally, Reliant is requesting an

alternate retention of 500 hours within 272 days with one or more employers to satisfy the retention requirement.

Commitment to Training

The Company's current training budget is approximately \$40,000 per facility. Training programs include staff orientation, staff in-services, sexual harassment prevention, and new hire training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Reliant's Vice President of Corporate Development has prior ETP experience and will oversee project administration with the assistance of the Vice President of Clinical Care. The Company will utilize Directors of Staff Development at each facility to coordinate project administration and training at their respective facilities. Reliant has also retained an administrative consultant to ensure that all training records meet ETP compliance. Training will take place at Reliant headquarters and the nine affiliate locations identified in this proposal. Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

National Training Systems, Inc. (NTS) in Ladera Ranch assisted with development for a flat fee of \$28,953.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

MEDICAL SKILLS - DIDACTIC

- ABT Stewardship
- Annual Skills Update
- Building Respect for Older LGBT Adults
- Infection Control
- Basic Life Support
- Bedrail QR Coding
- Bedrail Use and safety
- Body Mechanics
- Blood Glucose Testing
- Behavioral Health Skills
- Patient Transfer Techniques
- Equipment Skills (including, but not limited to pumps, vital monitoring devices, support systems, therapeutic modalities)
- Advanced Cardiac Life Support
- Change of Condition Management
- Hospice Care
- Interdisciplinary Team Process
- Pain Management (Acute and Chronic)
- Intravenous Therapy
- Enteral Feeding Tube Management
- Respiratory Care
- Restorative Nursing
- Wound Management
- Diabetic Management
- Urinary Management (Foley catheter, input/output)
- Resident and Family Education
- Medication Administration Management
- Medication Monitoring
- Restraint and Restraint Reduction
- Behavior Management
- Psychotropic Medication Management
- Patient Assessment & Care
- Physical, Occupational, Speech Therapy
- End of Life Care
- Patient Fall Prevention
- Dementia/Alzheimer's
- Neurovascular System
- Safe Injection Training
- Residents with Special Needs
- Gastrointestinal System
- Laboratory
 - Electrolyte Imbalance
 - Arterial Blood Gas Interpretation

- Cardiac Conditions
- Neurological Conditions
- Resident Emergency Response
- Skeletal/Orthopedic Conditions
- Incontinence Management (colostomy care, urinary catheter care)

MEDICAL SKILLS - PRECEPTOR

- Inpatient & Outpatient Care Unit
 - Medication Management/Black Box Warnings
 - Advanced Assessment Skills
 - Advanced Clinical Skills
 - Infection Control
 - Patient Safety
 - Bedrail QR Coding
 - Bedrail Use and Safety
 - Clinical Skills Review
 - Clinical Certification Skills
 - Patient Assessment and Care
 - Intravenous Therapy
 - Enteral Management
 - Bolus
 - Intermittent
 - Continuous
 - Feeding Tube
 - Insertion
 - Site Care
 - Removal
 - Dementia Care
 - Assessing of Tube-Fed Individuals with Diabetes Mellitus
 - Preventing and Identifying Complications Related to Tube Feedings
 - Respiratory Care
 - Wound Management
 - Safe Injection Training
 - Hemovac/Pneumovac
 - Dementia/Alzheimer's
 - Managing Patients with Neurovascular Conditions
 - Residents with Special Needs
 - Gastrointestinal Conditions
 - Cardiac Conditions
 - Skeletal/Orthopedic Conditions
 - Incontinence Management (colostomy care)
 - Assisting and Performing Self-Care Skills with Patients; Facilitating Functional Gains of Each Patient
 - Functional Mobility and Ambulation
 - Bowel and Bladder Training of Patients
 - Identification of Skin Impairments and Prevention
 - Identification of Patient Change in Condition
 - Monitoring of Cardiovascular Changes such as Vital Signs, Endurance, Level of Consciousness
 - Breathing Patterns and Respiratory Function
 - Pain Management
 - Positioning of Patients for Correct Body Alignment

- Monitor Blood Pressure of Patients
- Operate Safety Devices with Patient
- Activities of Daily Living
- Conduct Range of Motion Exercises with Patient
- Patient Care of Foot and Hand
- Infection Control
- Charting
- Colostomy Care
- Hazardous Waste Handling
- Isolation Techniques
- Safe Patient Handling
- Use of the Call Light System
- Safe Linen Handling

COMPUTER SKILLS

- Electronic Medical Records Application Skills
- Electronic Tablet for Bedside Charting
- Microsoft Office (intermediate and advanced)

CONTINUOUS IMPROVEMENT

- Administration
- Medical Records
- Customer Service
- Communication Skills
- Compliance
- Conflict Resolution
- Cultural Sensitivity Training
- Director of Nursing Huddles
- Problem Analysis and Problem Solving
- Clinical Services System Management
- Interdepartmental Collaboration
- Interdisciplinary Team
- Incident/Accident Management
- Person Centered Care
- Mobility Skills
- Documentation
- Continuous Quality Improvement Workshop
- Culturally Appropriate Care
- Team Building
- The Five Star Rating System
- QAPI Process

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



May 11, 2018

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

To Whom It May Concern:

This letter is to confirm the support of SEIU Local 2015 for the Reliant Management training proposal as submitted to the Employment Training Panel.

For the Union,

Edward Burke
Statewide Nursing Home Bargaining Director
SEIU Local 2015
681 W. Capitol Ave., Suite 100
West Sacramento, CA 95605
Office: (213) 985-0462
Cell: (213) 595-6661
Email: edwardb@seiu2015.org



RETRAINEE - JOB CREATION

Training Proposal for:

Virgin Orbit, LLC

Agreement Number: ET19-0123

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate Veterans HUA	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Kern, Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 430	U.S.: 430	Worldwide: 430
<u>Turnover Rate:</u>	11%		
<u>Managers/Supervisors:</u> (% of total trainees)	14%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$595,400		\$0	\$0		\$595,400

In-Kind Contribution:	100% of Total ETP Funding Required	\$1,404,720
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Adv. Tech, Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills	415	8-200	0	\$1,040	*\$12.53
				Weighted Avg: 40			
2	Retrainee Veterans Priority Rate	Adv. Tech, Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills	20	8-200	0	\$1,040	*\$12.53
				Weighted Avg: 40			
3	Retrainee Job Creation Priority Rate	Adv. Tech, Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills, PL-Mfg. Skills	100	8-200	0	\$1,430	*\$11.00
				Weighted Avg: 55			

*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: \$17.54 per hour for Los Angeles County and HUA Wage \$12.53 per hour for Kern County. Job Number 3 (Job Creation): \$14.62 per hour for Los Angeles County and HUA Wage \$11.00 per hour for Kern County.

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

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Numbers 1-3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 & 2		
Operator		18
Administrative Staff		43
Supervisor/Manager		66
Technician		92
Engineer		178
Sales Staff		5

Laborer		5
Service Staff		28
Job Number 3		
Operator		9
Administrative Staff		13
Supervisor/Manager		7
Technician		25
Engineer		24
Sales Staff		4
Laborer		5
Service Staff		13

INTRODUCTION

Founded in 2017, Virgin Orbit, LLC (Virgin Orbit) (www.Virginorbit.com) 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.

PROJECT DETAILS

Virgin Orbit is ramping up for its first rocket launch, projected to take place later this year. In 2017, the Company began gearing up production and investing in new technologies and advanced design concepts to create the "factory of the future." To support this effort, Virgin Orbit has adopted an aggressive recruiting, training/development and retention strategy. This strategy includes increasing its workforce by 50% and building technical training programs to accommodate rapid growth. In addition, the Company will invest approximately \$7 million in new equipment and technology over the next 18 months.

Training at all levels of the organization is necessary to ensure that workers develop the knowledge and skills to operate equipment properly and safely, as well as implement process improvements designed to maximize efficiency. The proposed project consists of robust technical cross-training and skills building concepts that focus on industry knowledge, new technology, teambuilding and leadership development.

Training will take place at the Company's facilities in Long Beach and Mojave.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Newly-hired trainees (Job Number 3) will be subject to a lower post-retention wage.

As Virgin Orbit continues to transition from research and development into manufacturing and advanced concept designs, the Company's need for a talented and diversified workforce continues to grow. Therefore, Virgin Orbit will hire 100 new employees (Job Number 3) across

all occupations. To accommodate this growth, the Company is adding a second building in Long Beach to house its customer payload processing center where satellites will be integrated into rocket payload. In Mojave, Virgin Orbit is adding additional shifts to meet increasing demand for its flight hardware and test fires. The Company anticipates facility expansion to accommodate pre-flight operations and testing.

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) as outlined below:

Business Skills: Training will be offered to all occupations. Training will focus on product and industry knowledge, customer support, communication, sales and marketing.

Computer Skills: Training will be offered to all occupations. Training will help workers become more proficient with software solutions in the areas of resource planning, business administration, logistics, and web applications.

Continuous Improvement: Training will be offered to all occupations. This training will focus on process improvements and problem solving methodologies that enhance productivity through lean enterprise principles, problem solving, project management and teambuilding.

Hazardous Materials: Training will be offered to Operators, Technicians, Engineers, Laborers, and Supervisors/Managers. This training will provide hazard communication skills to frontline workers and lead personnel. Trainees will also learn proper handling of hazardous materials specific to Virgin Orbit’s manufacturing processes.

Manufacturing Skills: Training will be offered to Operators, Technicians, Engineers, Laborers, Service Staff, and Supervisors/Managers. Training will focus on spacecraft structures and systems, engineering tolerances, production equipment/tools, satellite concepts and supply chain management.

Advanced Technology: Training will be offered to Engineers, Technicians, and Operators. These trainees must be skilled to work on rockets, spacecraft, and various intricate component parts. Training topics will include aerospace analysis, design, and advanced engineering. These courses will cover leading technologies in spacecraft manufacturing and rocket science.

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.

PL training is the most effective way for employees to fully comprehend the unique rocket/spacecraft production process and complex manufacturing equipment. PL training will be provided to approximately 300 Technicians, Engineers, Operators, and Service Staff trainees. 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 and equipment operation. Training will include hands-on instruction in the use of the following equipment: lathes, CNC machine tools, laser and carbon

fiber cutters, welding machinery, pipe benders, x-ray machines, prepreg composite and layup technology, and precision inspection machines. Training will be provided by qualified instructors with industry knowledge and expertise in Virgin Orbit's manufacturing processes. Trainee will receive approximately 60 PL hours per trainee with a trainer-to-trainee ratio of 1:1.

High Unemployment Area

Approximately 50 trainees (Job Numbers 1-3) work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. However, Virgin Orbit is not requesting an HUA wage modification.

Commitment to Training

Virgin Orbit will spend approximately \$320,000 on training for its California facilities in 2018. Company-funded training includes employee onboarding, technical awareness, career development and leadership readiness. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The Senior Manager of People Learning & Development will oversee project administration and training. Additional support staff at each location will assist with training coordination, tracking and documentation. Virgin Orbit has also retained an outside administrative consultant to ensure that all training adheres to ETP requirements. Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

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

ADMINISTRATIVE SERVICES

Training Funding Source will also provide 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:

ADVANCED TECHNOLOGY

- Advanced Aerospace & Aircraft Design
- Advanced Design Project Management & Processes
- Advanced Engineering Concepts
- Advanced IT Systems & Configuration
- Advanced Rocket Concepts
- Advanced Software & Systems
- Advanced Technology Systems Training
- Composites Fabrication
- Configuration Management
- Cryogenic Engineering & Safety
- Data Acquisition & Management
- Design Review
- Engineering Methods & Processes
- Enterprise Resource Planning System Design & Implementation
- Modeling & Postprocessing Software & Application
- Mechanical Design
- Non-Destructive Testing
- Software Design & Programming
- Software Testing & Automation

BUSINESS SKILLS

- Accountability & Influence
- Branding & Design
- Communication Skills
- Conflict Resolution
- Customer Service & Support
- Effective Meeting Management
- Finance/Accounting Skills
- Goal-Setting & Motivation
- Industry Knowledge
- Leadership
- Managing Performance
- Marketing & Sales Skills
- Presentation Skills
- Product/Service Knowledge
- Scheduling Skills
- Standard Operating Procedures
- Train-the-Trainer Workshop
- Teambuilding
- Understanding Our Business

COMPUTER SKILLS

- Digital Literacy Skills
- Enterprise Systems
- Software & Systems
- Web Application Skills

CONTINUOUS IMPROVEMENT

- Agile Project Management
- Decision Making/Problem Solving Skills
- Design of Experiments
- Engineering Change
- Kanban Skills
- Lean Manufacturing
- Project Management
- Process & Quality Improvement
- Root Cause Analysis
- Six Sigma
- Teambuilding
- Time Management

HAZARDOUS MATERIALS

- Hazard Communication/GHS
- Hazardous Materials Management

MANUFACTURING SKILLS

- Aerospace Manufacturing Skills
- Aircraft Structures, Operations & Assembly
- Aircraft Systems Integration
- Confined Spaces
- Console Operations
- CNC Machine Programming & Operation
- Cross-Functional Equipment & Production Skills
- Cryogenics
- Data System Operations
- Electrical Procedures
- Equipment Operations and Maintenance
- Emergency Operations/Firefighting
- Engineering, Technician, Workgroup Fundamentals
- Explosives Awareness
- Flight Hardware
- Ground Support Systems Engineering
- Gauges & Calibration
- Geometric Dimension and Tolerances
- Inventory, Logistics & Supply Chain Management
- Inspection/Integration
- LASER Operations
- Manufacturing Best Practices
- Oxygen Systems
- Production Equipment and Tools

- Preventive Maintenance
- Pressurized Systems
- Radiation/X-Ray
- Rocket Propellant Systems
- Satellite Concepts
- Shop Procedures
- Test Site Operations
- Technical Operations
- Welding/Hot Work

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

Productive Lab Hours

0-60

MANUFACTURING SKILLS (1:1 ratio)

- Equipment Operations
- Good Manufacturing Practices
- Hazard Analysis & Critical Control Point
- Inventory Management
- Inspection Techniques
- Manufacturing Processes & Procedures
- Production Equipment/Tools (Preventative Maintenance)
- Shop Floor Control
- Standard Operating Procedures
- Shop Floor Data Collection
- Tooling
- Troubleshooting
- Work Procedures

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:
AFFIRMA Rehabilitation, Inc.
Agreement Number: ET19-0135

Panel Meeting of: June 22, 2018

ETP Regional Office: San Diego

Analyst: C. Clady

PROJECT PROFILE

Contract Attributes:	SET Job Creation Initiative Retrainee Priority Rate	Industry Sector(s):	Healthcare Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Counties Served:	Orange County	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
Number of Employees in:	CA: 333	U.S.: 1,500	Worldwide: 1,500	
Turnover Rate:	7%			
Managers/Supervisors: (% of total trainees)	N/A			

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$387,504		\$0	\$0		\$387,504

In-Kind Contribution:	100% of Total ETP Funding Required	\$649,260
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SET Medical Skills Training	Continuous Improvement, Computer Skills, MS-Didactic, MS-Clinical Precptor	318	8-200	0	\$858	\$30.36
				Weighted Avg: 33			
2	Priority Rate Job Creation Medical Skills Retrainee	Continuous Improvement, Computer Skills, MS-Didactic, MS-Clinical Preceptor	90	8-200	0	\$1,274	\$14.58
				Weighted Avg: 49			

Minimum Wage by County:

Job Number 1: \$30.36 per hour in Orange County SET Priority Industry.

Job 2: \$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

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

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Therapist		137
Therapist Assistant		142
Facility Rehabilitation Director		39
Job 2 Retrainee-Job Creation		
Therapist		45
Therapist Assistant		34
Facility Rehabilitation Director		11

INTRODUCTION

Founded in 1994 and headquartered in Aliso Viejo, AFFIRMA Rehabilitation, Inc. (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.

Project Details

Patients 65 and older have an increasing need for Physical therapy. Physical Therapy programs are among the top treatments for injuries related to falls, especially for seniors according to the Centers for Disease Control and Prevention.

AFFIRMA is committed to providing extensive training to Physical Therapists, Physical Therapy Assistants and Facility Rehabilitation Directors. Facility Rehabilitation Directors are clinicians with certain supervisory skills. Training will enable staff to provide exceptional care to patients with disabilities and injuries in order to increase their customer's patient satisfaction. Training will include therapy and billing software, Casamba. All trainees will receive training on this highly effective system which is necessary to meet current regulatory requirements.

ETP-funded training will enable the Company to increase skills of current and newly hired staff to effectively care for special patient populations at its healthcare facilities.

Waiver for 35 hour workweek

AFFIRMA's standard work week for fulltime benefited employees is 30 hours. AFFIRMA requests a waiver to the ETP standard 35 hours – from 35 to 30 hours for fulltime employees.

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.

AFFIRMA is growing rapidly and will increase its California staff by 30% in the next two years. AFFIRMA has committed to hiring 90 employees, including 45 new Physical Therapists, 34 new Therapist Assistants and 11 Facility Rehabilitation Directors (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.

Special Employment Training

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

Training Plan

Medical Skills Training

This program provides funding for allied healthcare occupations with a Reimbursement Rate of \$26 for clinical and didactic training and clinical preceptor model.

The training is non-productive, and the Preceptor is not counted in billings for those days. The trainee works the same shift as the Preceptor, and throughout the clinical training, is working to meet assessment requirements for the department via a checklist. At the end of each shift, the Preceptor and trainee discuss skills validated, etc. The trainee will not have productive work time during the preceptor training.

Computer Skills:

Training will be offered to all occupations. Course topics include Electronic Medical Record Skills Application, MS Office Suite, Word, Excel, PowerPoint and Casamba, a therapy documentation and billing system.

Continuous Improvement:

Training will be offered to all occupations. Course topics include Conflict Resolution, Coordination of Care, Customer Service, Data Collection, Discharge Planning, Disaster Preparedness, Finance & Accounting, Leadership Skills, Preceptor Skills, Reporting, Teambuilding, and Quality Improvement.

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 \$350,000 for all training including onboarding, annual compliance, and skills competency.

➤ Training Infrastructure

The Vice President and the Director of compliance will provide program oversight. In addition, the Company hired National Training Systems, Inc. (NTS) to aide in the administration of the ETP program. Training will be provided by in-house experts and vendors to be determined.

Impact/Outcome

The demand for the Company's services are growing dramatically due to an aging population, higher number of insured patients, and regulatory emphasis on less expensive forms of care. ETP funding will assist AFFRIMA in building the additional staff capabilities and skills necessary to meet or surpass planned growth goals.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

AFFRIMA retained National Training System Inc. (NTS) in Ladera Ranch to assist with development of this proposal for a flat fee of \$18,832

ADMINISTRATIVE SERVICES

NTS 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:

CONTINUOUS IMPROVEMENT

- Conflict Resolution
- Coordination of Care
- Customer Service
- Data Collection
- Dealing with Difficult people
- Discharge Planning
- Disaster Preparedness for Patients
- Documentation Skills
- Finance & Accounting
- Leadership Skills
- Preceptor Skills
- Reporting
- Team Building
- Quality Improvement

COMPUTER SKILLS

- Electronic Medical Records Application Skills
- MS Office Suite Skills (Intermediate & Advanced ONLY)
 - Word
 - Excel
 - PowerPoint
- Casamba
- Patient Billing & Accounts Receivable (PBAR)
- Claims Tracking Software Skills

MEDICAL SKILLS TRAINING – DIDACTIC

- Annual Skills Updates
- Abuse Prevention
- Activities of Daily Living
- Aquatic Therapy
- Basic Life Support (BLS)
- Biofeedback
- Body Mechanics
- Brain Injury Rehabilitation
- Cardiac Rehabilitation
- Cold Laser
- Conditioning Protocol for Therapy Patients
- Dementia Care
- Equipment Skills
- Functional Capacity

- Functional Restoration
- Geriatric Care
- Hyperbaric Oxygen
- Infection Control
- Mobility Assessment
- Occupational Therapy Skills
- Care of the Parkinson's Disease Patient
- Passy-Muir Valve (PMV) Placement
- Patient Assessment & Care
- Physical Therapy Skills
- Care of Patients with Post Traumatic Stress Disorder
- Safe Patient Handling
- Speech & Language Pathology Skills
- Splint Assessments & Measurements
- Stroke Rehabilitation
- Telemedicine
- Ventilator & Tracheotomy Care
- Wheelchair Assessment
- Wound Care

MEDICAL SKILLS TRAINING – CLINICAL W/ PRECEPTOR

- Patient Assessment & Care
- Conditioning Protocol for Therapy Patients
- Activities of Daily Living
- Dementia Care
- Geriatric Care
- Occupational Therapy Skills
- Mobility Assessment
- Physical Therapy Skills
- Care of the Parkinson's Disease Patient
- Special Needs Patients
- Speech & Language Pathology Skills
- Rehabilitative Skills

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



Training Proposal for:
Unical Aviation Inc.

Agreement Number: ET19-0129

Panel Meeting of: June 22, 2018

ETP Regional Office: San Diego

Analyst: K. Hernandez

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate HUA	Industry Sector(s):	Transportation/Logistics Warehousing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, San Bernardino	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 620	U.S.: 620	Worldwide: 626
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	7%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$409,500		\$0	\$0		\$409,500

In-Kind Contribution:	100% of Total ETP Funding Required	\$521,008
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate Priority Rate	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp., HazMat, PL-Comm'l Skills	300	8-200	0-60	\$910	\$17.54
				Weighted Avg: 35			
2	Retrainee Priority Rate HUA	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp., HazMat, PL-Comm'l Skills	150	8-200	0-60	\$910	*\$12.53
				Weighted Avg: 35			

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

Minimum Wage by County: Job Number 1: \$17.54 per hour in Los Angeles County

Job Number 2(HUA) \$12.53 per hour 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 \$2.50 may be used to meet the Post-Retention Wage in Job Number 1; and up to \$1.06 per hour in Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Production Staff		200
Operations Staff		80
Managers		20
Job Number 2		
Production Staff		100
Operations Staff		40
Managers		10

INTRODUCTION

Founded in 1990 and located in the City of Industry, Unical Aviation Inc. (Unical) supplies aircraft parts and components to the aerospace industry from a 500,000sq 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.

In 2014 Unical split into five separate companies; Unical, Unical MRO, Inc. (UMRO), Unical 145, Inc. (U145), Unical Defense, Inc. and Unical Aero, Inc. Unical and its affiliates UMRO and U145 will participate in this training project. Unical provides spare aircraft parts and services that meet a comprehensive range of aviation industry demand; UMRO, located at the San Bernardino Airport, provides aircraft parking, teardown and demolition services. Located in the, City of Industry, U145 provides FAA 145 repair for a variety of platforms including mechanical and hydraulic accessories, aero structures and landing gear overhauls.

PROJECT DETAILS

Unical has experienced 20% sales growth annually for the past seven years, increasing its workforce to more than 500 employees. In order to maintain this growth, the Company will invest in new software systems, mechanical equipment and technical skills training.

UMRO recently leased additional hangars to expand its services to include storage and maintenance of airworthy and return-to-service aircraft. UMRO invested approximately \$1.5 million in tooling equipment to expand its maintenance capabilities to include heavy maintenance and engine disassembly on both commercial and rotary wing aircraft and specialized repair services. With this expansion, UMRO must train Production Staff in Aircraft Assembly/Disassembly/Repair Skills, Aircraft Inspection Skills and Aviation Electrical Skills.

Unical will release a new Websense/Forcepoint Data Loss Prevention (DLP) system in 2018. This software is designed to protect files in protected folders from being printed, copied, moved, or accidentally deleted. This will secure the Company's confidential files to ensure there's no loss of proprietary information. In order to successfully implement the new system, the Company must train Production and Operations Staff in Websense/Forcepoint DLP system, Document Sharing Processes and Unical Proprietary Systems.

U145 staff need training on the Company's software systems and critical business operations. U145 will provide extensive training to its Managers, Production and Operations Staff to effectively and efficiently use the equipment and software systems.

Training Plan

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

Business Skills: Training will be provided to Operations Staff and Managers and focus on increasing productivity and efficiency by building skills around Contract/Negotiation Skills, Marketing/Sales Skills and Supply Chain Management.

Commercial Skills: Training will be provided to Production and Operations Staff in the critical skills needed for Aircraft Purchase/Acquisition, Aircraft Testing and Engineering.

Computer Skills: Training will be provided to all occupations to effectively utilize Enterprise Resource Planning System, Microsoft Project.

Continuous Improvement: Training will be provided to all occupations and focus on Change Management Skills, Project/Program Management Skills and Resource Planning.

Hazardous Materials: Training will be provided to Production and Operations Staff to learn the skills necessary for the Transportation of Dangerous Goods and effectively manage Hazardous Materials/Gases.

Certified Safety Training

1. 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, Production Staff and Operations Staff will receive up to 24 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, the certification entity has not yet been determined.

Productive Laboratory

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

Due to the nature of Unical’s business, there are many skills that must be learned with hands-on experience. PL training would allow for practical, real world experience that cannot be duplicated in a classroom setting. Classroom instruction is an inadequate and ineffective learning method of training for Production Staff because of the complex equipment to be trained on. In addition, the equipment is too large to be brought into a classroom and it is very expensive. PL training is required for Production Staff to assure comprehensive training in Commercial Skills.

Trainees will be under direct trainer supervision at all times. The trainer will impart knowledge, observe, verify comprehension, and submit appropriate training documentation. Unical requests a PL trainer-to-trainee ratio of 1:2 as a small percentage of PL training is currently delivered in small teams of 1:2 in the field. This is the most efficient training method for staff in the field. Approximately 300 trainees will receive around 60 PL hours in the following equipment: Arbor Press, manual hand punch, sheet metal notcher, hydraulic press brake, cold cut saw, various cranes/lifts, Binks electric oven, rotor blade balancing equipment, landing gear removal equipment, engine removal equipment and Speed lathe.

Computer-Based Training

CBT training will be provided as an extension to Classroom/Lab training. This additional training will ensure trainees are increasing the retention of information from their Classroom/Lab training. The CBT training will focus on critical Business and Commercial Skills in Federal Aviation Regulation and Personal Protective Equipment safety training.

High Unemployment Area

Trainees (Job Number 2) work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. UMRO’s location in San Bernardino is in an HUA.

➤ 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. Unical is requesting an HUA wage modification for these trainees, to \$12.53 per hour.

Temporary to Permanent Hiring

Unical will train ten Production Staff in Job Number 1 and ten Production Staff in Job Number 2, under Panel guidelines for the Temporary-to-Permanent program with the intention on hiring them fulltime. No progress payments will be taken on temp-to-perm trainees until the trainee is hired fulltime and retained on the job for 90 days. The average time for converting temporary workers into full-time permanent employment is three months. Trainees will not receive employer paid health benefits while temporary employees. However, the trainees will be eligible for employer paid health benefits after 60 days.

These trainees must be eligible to participate in ETP-funded training. Moreover, they cannot be enrolled until they have been hired by Unical 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

In 2017 Unical invested approximately \$465,000 for training in basic new-hire orientation, anti-harassment, diversity and required OSHA. In addition, it provides first aid/CPR/AED and other related training. ETP training will help Unical implement a new curriculum, related to new products, processes and rapid growth. 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

Unical retained Training Funding Partners (TFP) to provide administrative support. The Vice President of Human Resources will administer the project. The Company's training staff will work with the TFP team to coordinate enrollment, update ETP systems, verify retention, and ensure compliance with all ETP requirements. Each location has a staff person assigned to help coordinate training.

Unical has dedicated training staff to provide the majority of training. Vendors will be procured as needed. The Training staff is also responsible for training plan design, training content creation, course scheduling, and training completion tracking.

Learning Management System

Unical has requested to utilize electronic recordkeeping. ETP staff has reviewed and approved the Company's learning management system.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

TFP in Fountain Valley assisted with development of this proposal for a flat fee of \$23,400.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Audit Skills
- Business Process Skills
- Business/Technical Writing Skills
- Communication Skills
- Contract/Negotiation Skills
- Customer Service Skills
- Documentation Skills
- Finance/Accounting Skills
- Import/Export Skills
- Inventory Control Skills
- Marketing/Sales Skills
- Planning and Scheduling
- Presentation Skills
- Sourcing and Procurement Skills
- Supply Chain Management
- Train-the-Trainer Skills
- Work Instruction Skills

COMMERCIAL SKILLS

- Advanced Safety Skills
- Aeronautical Parts and Materials
- Aircraft Assembly/Disassembly/Repair Skills
- Aircraft Inspection Skills
- Aircraft Maintenance/Equipment Skills
- Aircraft Purchase/Acquisition Skills
- Aircraft Testing Skills
- Aviation Electrical Skills
- Engineering Skills
- FAA Guidelines
- Foreign Object Debris Identification Skills
- Hydraulics
- Work Instruction Skills

COMPUTER SKILLS

- Aerolearn System Skills
- Computer Programming/Software Development Skills
- Document Sharing Process System
- Enterprise Resource Planning System
- Intermediate/Advanced MS Office Skills (Word/Excel/PowerPoint)
- Microsoft Project
- Microsoft Visio
- Quantum System Skills

- Software/Hardware Skills
- System Architecture/Design Skills
- Unical Proprietary System/Software Skills
- Websense/Forcepoint Data Loss Prevention System

CONTINUOUS IMPROVEMENT

- Business Development Skills
- Change Management Skills
- Conflict Management Skills
- ISO Standards
- Leadership/Coaching Skills
- Meeting Management Skills
- Performance Improvement/Management
- Process Improvement/Six Sigma Skills
- Project/Program Management Skills
- Quality Assurance/Quality Control
- Resource Planning
- Risk Management Skills
- Strategic Thinking Skills
- Team Building Skills
- Troubleshooting Skills

HAZARDOUS MATERIALS

- Transportation of Dangerous Goods
- Hazardous Materials/Hazard Communication Skills/Gases

Productive Lab Hours

0 – 60

COMMERCIAL SKILLS (Ratio 1:2)

- Advanced Safety Skills
- Aeronautical Parts and Materials
- Aircraft Assembly/Disassembly/Repair Skills
- Aircraft Inspection Skills
- Aircraft Maintenance/Equipment Skills
- Aircraft Purchase/Acquisition Skills
- Aircraft Testing Skills
- Aviation Electrical Skills
- Engineering Skills
- FAA Guidelines
- Foreign Object Debris Identification Skills
- Hydraulics
- Work Instruction Skills

CBT Hours

0 – 60

BUSINESS SKILLS

- Importance of Communication for Aircraft Techs (.33 hours)
- Business Writing Letters and E-mails (1 hour)
- Conflicts of Interest (1 hour)
- Creating Valuable Customer Relationships (1 hour)
- Presentation Skills (1 hour)
- Breaking Bad Communication Habits (1 hour)
- Collaboration Skills in the Workplace (1 hour)
- How to Write Effective Job Descriptions ... in Half the Time (1 hour)
- Managing the Front Desk (1 hour)
- The Business Grammar "Crash Course" (1 hour)
- Create Better Understanding Through Active Listening (1 hour)

COMMERCIAL SKILLS

- Detecting and Reporting Suspected Unapproved Parts (.33 hours)
- Electrical Safety (.83 hours)
- Federal Aviation Regulation Part 1 - Definitions and Abbreviations (.83 hrs)
- Federal Aviation Regulation Part 145 - Sub Sections 211 and 213 Reviewed (.25 h)
- Federal Aviation Regulation Part 145 - Subpart C (.5 hours)
- Federal Aviation Regulation Part 145 - Subpart D (.5 hours)
- Federal Aviation Regulation Part 145 - Subpart E (.33 hours)
- Federal Aviation Regulation Part 39 - Airworthiness Directives (.5 hours)
- Federal Aviation Regulation Part 43 - A Repair Station Perspective (.83 hours)
- Federal Aviation Regulation Part 65 - A Repair Station Perspective (.83 hours)
- Fatigue Management (.5 hours)
- Foreign Object Debris/Damage (1 hour)
- Fork Lift Physics (.5 hours)
- Know Your Lift Truck (.75 hours)
- Lift Truck Safety (.5 hours)
- Personal Protective Equipment-Eye and Face Protection (.5hours)
- Personal Protective Equipment - Foot Protection (.25 hours)
- Personal Protective Equipment - Hand Protection (.5 hours)
- Personal Protective Equipment - Hearing Protection (.5 hours)
- Personal Protective Equipment - Respiratory Protection (.5 hours)
- Personal Protective Equipment - Head Protection (.33 hours)
- FAA Employee (1 hour)

COMPUTER SKILLS

- Proper Use of Aerolearn e-Training Software (.33 hours)
- Search Engine Optimization (1 hour)

CONTINUOUS IMPROVEMENT

- Building Teamwork into an Organization (.33 hours)
- Human Factors - The Danger Zones (1.17 hours)
- Identifying Human Factors (.33 hours)
- Importance of Maintenance Resource Management (.5 hours)
- Introduction to Situational Awareness (.83 hours)
- It is All a Matter of Human Factors (.33 hours)
- Delegation (1 hour)
- Delivering Effective Feedback (1 hour)
- Establishing Performance Goals and Expectations (1 hour)
- FAA Supervisor (2 hours)
- Supervisor Refresher (1 hour)
- Dealing with Toxic Employees: Eliminating Bad Behavior (1 hour)

HAZARDOUS MATERIALS

- Hazmat - Health Hazards (.33 hours)
- Hazmat - Labeling (.5 hours)
- Hazmat - MSDSs (.5 hours)
- Hazmat - Physical Hazards (.5 hours)
- Hazmat - Protective Measures (.33 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:

Alta Vista Solutions, Inc.

Agreement Number: ET19-0131

Panel Meeting of: June 22, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Priority Rate HUA	Industry Sector(s):	Engineering Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Contra Costa, Fresno, Los Angeles, Sacramento	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 139	U.S.: 152	Worldwide: 152
<u>Turnover Rate:</u>	7%		
<u>Managers/Supervisors:</u> (% of total trainees)	2%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$226,200		\$0	\$0		\$226,200

In-Kind Contribution:	100% of Total ETP Funding Required	\$400,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills Commercial Skills Cont. Improv., Mfg. Skills, HazMat, OSHA 10, PL- Commercial Skills, Computer Skills	110	8-200	0-34	\$1,820	\$16.70
				Weighted Avg: 70			
2	Retrainee Job Creation Priority Rate	Business Skills Commercial Skills Cont. Improv., Mfg. Skills, HazMat, OSHA 10, PL- Commercial Skills, Computer Skills	10	8-200	0-34	\$2,600	\$14.00
				Weighted Avg: 100			

Minimum Wage: For Job Number 1 the ETP Minimum wage of \$18.22 for Contra Costa, \$16.80 for Sacramento, \$16.70 for Fresno, \$17.54 for Los Angeles is required. For Job Number 2, the ETP Minimum wage of \$15.18 for Contra Costa, \$14.00 for Sacramento, and \$14.62 for Los Angeles is required.

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

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		2
Assistant		3
Communications Staff		3
Operations Staff		3
Coordinator		4
Engineer		54
Human Resources		2
Inspector		40
Manager		2
Job Number 2		
Engineers		10

INTRODUCTION

Founded in Emeryville in 2003, Alta Vista Solutions, Inc. (AVS) (<http://altavistasolutions.com>) 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.

The Company has six facilities in California; Richmond, Fresno, Long Beach, Pacoima, Los Angeles, and Sacramento. All locations will participate in training under this proposal.

Training will upgrade employee skills to provide technical support to the Federal Highway Administration (FHWA) regarding bridge performance and monitoring to improve deterioration prediction modeling and capital expenditure decision-making. Furthermore, software updates, new equipment, government mandates, new and revised building codes, and regulations are reportedly significantly impacting the Company's design processes, driving the need for training.

AVS is eligible for ETP funding consideration for Priority Industry reimbursement rate as a provider of Engineering Services.

PROJECT DETAILS

In December 2017, FHWA awarded Alta Vista Solutions, a five-year, \$50 million contract to provide technical services and research support for FHWA's Long Term Bridge Performance Program. AVS has launched two emerging technologies for use on construction projects aimed to improve surveying and testing engineering tasks and improve safety for the public and workers. Engineers are piloting drones equipped with light detection and ranging (LiDAR) lasers—a surveying tool that uses a laser to create high-resolution geographical data. The combination of the two emerging technologies has never been done in construction and opens untold possibilities for unmanned aerial vehicle technology and related jobs in the future. AVS plans to train staff to use such tools.

With ETP funds for training AVS aims to:

- Support company growth by gaining and training new workers for high skilled well paid positions
- Standardize best practices
- Upgrade skills in architectural design/engineering/construction software such as: Building Information Modeling, Revit, and AutoCAD.
- Adapt to revised and periodically changing internal/external industry standards and technologies.

New skills are needed to remain competitive and ensure standards are met. Organizations such as National Highway Institute, National Safety Council, American Concrete Institute publish regular updates on industry standards and Alta Vista has developed an internal training program to stay current with these changes in order to incorporate new code requirements into its 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. AVS has committed to hiring 10 new employees (Job Number 2). Trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

During the proposed contract AVS expects to train staff on recently purchased production equipment and software (estimated value of \$109,000). AVS expects to add at least 10 net new Engineer jobs over the next 21 months at its facilities to accommodate company growth. AVS represents that these company locations have ample room to accommodate new Engineers.

Training Plan

AVS's training will be delivered via Classroom/laboratory, Computer-Based Training (CBT), and Productive Lab (PL). Trainees will receive up to 200 hours of class/lab training with up to 40 hours of PL per trainee. Training will be provided by in-house trainers and vendors.

Business Skills: This training will be offered to all occupations. Training will focus on providing employees with the ability to utilize the new technologies to maximize day-to-day tasks with efficiency. Skills improvement in Administration, Communications, and Operations were identified in AVS' training needs assessments. Topics such as Accounting, Business Development, and Communication aim to assist the Company with implementing new processes, pertaining to new business growth resulting from expanding workforce and new customers.

Commercial Skills: This training will be offered to Engineers, Inspectors, and Managers. Topics such as Building Construction Standards, Program Quality Management, and Engineering Processes, focus on practical and technical skills of architecture and construction. The shift from building aesthetics to sustainable design requires employees to incorporate new design elements into projects. AVS must keep pace with new and rapidly changing technologies including new materials, design methods, and tools. Additionally, environmental concerns and changing regulations or industry related standards are placing unique training demands on the construction industry in general to address frequent updates to internal processes.

Computer Skills: This training will be offered to all occupations to improve the efficient use of the Company's new and updated systems that support projects and assist in the management of business operations. Topics such as Accounting Software, Scheduling Software, Customer Relationship Management training will be delivered to employees within the Administration, HR, and Operations staff. Topics such as Illustration Software, Time and Expense Management, Architectural Design, and CAD will be delivered to Engineers, Inspectors, and Managers.

Manufacturing Skills: This training will be offered to Engineers, Inspectors, and Project Managers who are focused on developing new products and services offered by AVS. Training to develop innovative solutions and improve use of new tools such as AVS's Unmanned Aerial System. The aim of the training includes upgrading skills that lead to the delivery of engineering design solutions, testing solutions and actual improved data collection capabilities from the improved use of custom made surveying tools. AVS represents these skills should enhance the Company's ability to meet current contracting requirements with customers with cost savings efficiency. Thus, training is expected to expand skills related to improving the Company's competitiveness and boost revenues. Training topics include Materials Handling, Inspection Techniques and Testing.

Continuous Improvement: This training will be offered to all occupations. Training is designed to promote company-wide teamwork and improve AVS's expanding line of products and services that aim to help save time and enhance performance and quality outcomes. Topics such as Quality Improvement, Team Management, and ISO900 are proposed. AVS represents the training is designed to assist the Company reach goals such as increasing productivity and further develop leadership skills to support growth, including the upward mobility of the workforce. The Company also aims to reduce costs as a result of increased efficiency.

Hazardous Materials: This training will be offered to Engineers, Inspectors, and Project Managers. Topics such as HazMat Handling and Nuclear Gauge are proposed.

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, Inspectors will receive up to 28 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 American Portable Nuclear Gauge Association.

Productive Laboratory

Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. Instructor will be dedicated to training delivery during all hours of training. An estimated 110 staff (Inspector, Engineer, Communications Staff, Coordinator) will receive PL training from experienced in-house senior level staff member to operate equipment or produce inspection services.

Trainees will receive approximately 40 hours of PL, with a 1:3 trainer-to-trainee ratio. Alta Visa routinely delivers up to 60 PL hours annually to Staff. Trainees must reach core competencies to operate new equipment and properly complete inspection processes. Many of the machines require competency before they can be safely operated independently. Internal certifications for operating new machines (LiDar Lasers, FHWA Robotics- Assisted Bridge Inspection Tool, Building and Construction Standards, Data Collection Instruments) will increase productivity and are expected by AVS to help avoid personal injuries. The 1:3 trainer to trainee ratio is requested to decrease lost productivity time of staff while bringing staff to competency levels.

High Unemployment Area

Trainees in Job Number 1 work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's location in Fresno County qualify for HUA status under these standards. However, Alta Vista is not asking for a wage and/or retention modification.

Impact/Outcome

The Company anticipates the training will;

- Provide upward mobility within the company for employees due to new skills developed such as architectural and design, updated codes knowledge and quality management.
- Assist in boosting revenues as a result of increased efficiency.

- Assist the Company in meeting quality control goals primarily within production under a period of growth defined by increased overall employees and increased contracts.
- Standardize best practices for processes related to the development of unmanned Aerial System and surveying tools.
- Maintain competitive market position and expand the number of employees that have OSHA certifications from 94 to 104.
- Maintain ISO 9001/13484.

Commitment to Training

AVS's annual training budget is estimated at \$474,988 between its five California locations. AVS's existing structured training covers new hire orientations, compliance training, required safety training, and a wide variety of company specific training delivered companywide.

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

AVS has 10 dedicated internal Administrators and over 30 in-house trainers to provide training and administer the project with designated staff at each location to coordinate training. Training is scheduled to be delivered in-house and by vendors. The Company also has obtained an Administrative Subcontractor that will assist in meeting ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

AVS retained Corporate Tax Incentives in Rancho Cordova to assist with development of this proposal for a flat fee of \$11,310.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

Click Safety of Walnut Creek will provide OSHA (CBT) training.

American Portable Nuclear Gauge Association of Emmitsburg, MD will provide Hazardous Materials (CBT) training.

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

8-200 Job Number 1 & 2 Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting/Finance
- Business Development and Sales
- Business Plan
- Communication Skills
- Conflict Resolution
- Customer Relations
- Goal Setting
- Leadership
- Marketing
- Negotiation and Agreements
- Organization Structures
- Performance Management
- Product Knowledge
- Program & Product Management
- Project Interview and Forecasting
- Team Cohesiveness
- Understanding Business and Industry
- Understanding Financial Information

COMMERCIAL SKILLS

- Building and Construction Standards
- Compliance
- Codes and Standards
- Change Orders
- Construction Administration
- Construction Documentation Development
- Data Collection Instrument
- Engineering Processes and Standards
- Materials Engineering and Assessment
- Oversight
- Paving
- Project Management/ Administration
- Project Reports
- Sustainable Design Strategies
- Problem Solving
- Safety and Inspection

COMPUTER SKILLS

- Accounting Software
- Adobe
- Aerial System
- CAD Software
- Customer Relationship Management (CRM)
- Illustration Software
- Reporting Software
- Office 365 (Intermediate)
- Scheduling Software

- Server Infrastructure
- Time and Expense Management
- Surveying Software
- RoadBotics Software

CONTINUOUS IMPROVEMENT

- 6S
- Baldrige Performance Excellence
- CQIA Certification
- Corrective/Preventive Actions
- Data Driven Decision Making
- ISO9001/13485
- Leadership/Mentoring
- Lean Manufacturing
- Process/Productivity/Quality Improvement
- Team Management

MANUFACTURING SKILLS

- Inspection Techniques
- In-Situ Materials Handling and Assessment
- Materials Testing
- Non-Destructive Testing
- Visual Inspections

HAZARDOUS MATERIALS

- HazMat Handling
- Nuclear Gauge & Equipment Handling

PL Hours

0– 40

Commercial Skills (limited ratio 1:3)

- ✚ Building and Construction Standards
- ✚ Change Orders
- ✚ Codes and Standards
- ✚ Construction Administration
- ✚ Construction Documentation Development
- ✚ Data Collection Instrument
- ✚ Engineering Processes and Standards
- ✚ Materials engineering and assessment
- ✚ Program quality management and oversight
- ✚ Project Management/Administration
- ✚ Project Reports
- ✚ Sustainable Design Strategies

CBT Hours

0 - 34

COMMERCIAL SKILLS

- ✚ Traffic safety (.75 hours)
- ✚ Driver safety (4 hours)
- ✚ Confined space (1.5 hours)
- ✚ Fall protection (1.5 hours)
- ✚ NHI 16-hour pre-requisite (16 hours)

OSHA

OSHA 10

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

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:
Audentes Therapeutics, Inc.
Agreement Number: ET19-0115

Panel Meeting of: June 22, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

PROJECT PROFILE

Contract Attributes:	Priority Rate Job Creation Initiative Retrainee	Industry Sector(s):	Biotechnology/Life Sciences Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Francisco, San Mateo	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 179	U.S.: 180	Worldwide: 180
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	17%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$728,000		\$0	\$0		\$728,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$1,400,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Commercial Skills, Continuous Improvement, Computer Skills	175	8-200	0	\$3,640	\$18.22
				Weighted Avg: 140			
2	Retrainee Job Creation Priority Rate	Commercial Skills, Continuous Improvement, Computer Skills	25	8-200	0	\$3,640	\$15.18
				Weighted Avg: 140			

Minimum Wage by County: Job Number 1 \$18.22 per hour for San Francisco and San Mateo Counties. Job Number 2 \$15.18 per hour for San Francisco and San Mateo Counties.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrator		8
Engineer		9
Maintenance Worker		9
Manufacturing Lead		14
Manufacturing Worker		21
Project Manager		7
Quality Assurance Worker		12
Research Associate		10
Scientist		12
Administrative Assistant		12
Senior Technical Staff		35
Manager		26
Job Number 2		
Administrator		1
Engineer		1

Maintenance Worker		1
Manager		4
Manufacturing Lead		2
Manufacturing Worker		3
Project Manager		1
Quality Assurance Worker		2
Research Associate		2
Scientist		2
Administrative Assistant		2
Senior Technical Staff		4

INTRODUCTION

Founded in San Francisco in 2012, Audentes Therapeutics, Inc. (Audentes) (www.audentestx.com), 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.

The Company has two facilities in California: headquarters in San Francisco and a manufacturing facility in South San Francisco. Both locations will participate in training.

This is Audentes' second ETP Agreement, its second in the last five years. The first Agreement assisted Audentes with testing clinical trials and reaching training goals. Audentes plans to manufacture and commercialize gene therapy products. In this project, ETP Funds will enable Audentes to achieve certification from the Food and Drug Administration (FDA) as a commercial manufacturing facility. In order for Audentes to qualify as a commercial drug manufacturer, it requires workers have the skills to validate compliance and enable staff to run tests to demonstrate consistency. Validation assessment related training is needed for Audentes to satisfy FDA 21 Code of Federal Regulation Parts 10 and 11 compliance related items. The implementation of numerous IT related processes, and improvements in operations and quality systems are all driven by FDA standards.

Additionally, training will support the Company's substantial growth in workforce from 66 employees in 2016 to 179 employees in 2018. Audentes will hire 25 new employees (Job Number 2).

Audentes is eligible for ETP funding for Priority Industry reimbursement rate as a manufacturer.

PROJECT DETAILS

Audentes is preparing staff to advance from clinical trials and testing to manufacturing several gene therapy products. The ETP training plan related to the new products are targeted to treat rare diseases, designed to either prolong life or improve the quality of life for patients.

Training to meet additional FDA requirements in Commercial skills, Continuous Improvement, and Computer Skills is necessary to meet FDA requirements and remain competitive.

No trainee will receive the same training as received in the prior ETP project. Training Curriculum has been updated from prior contract.

Retrainee – Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly hired employees will be reimbursed at \$26 per hour, and trainees will be subject to a lower post-retention wage. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

Audentes has committed to hiring 25 net new employees (Job Number 2) across various occupations at its two facilities over the next 21 months. The workers are needed for the advancement from clinical trials and testing to manufacturing several gene therapy products. Audentes has ample space to accommodate new employees. Audentes expects to train staff on recently purchased production equipment and software.

Commitment to Training

Audentes' annual training budget is \$200,000. Audentes' existing structured training covers new-hire orientation, on-the-job training, and conferences, 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

Audentes has four dedicated Administrators and 30 in-house trainers. The company will also use an experienced Administrative Subcontractor, Steve Duscha, to ensure training is documented and tracked to meet ETP's requirements. Training is scheduled to be delivered in-house with some California based vendors to be determined.

Impact/Outcome

A key outcome of this training is to improve staff skills leading to the eventual FDA approval needed for their South San Francisco manufacturing facility.

Training Plan

Audentes training will be delivered via Classroom/laboratory. Frontline workers will receive up to 200 hours of class/lab training in the following:

Commercial Skills: Training will be offered to all occupations. Training will focus mainly on upgrading staff's skills to meet elevated FDA regulatory requirements. Training in Clinical Trials, Process Development, Program Management, R&D, Production, Quality Control, Maintenance, Facility Process and Validation Readiness will be delivered as required according to occupation.

Continuous Improvement: All occupations will receive one or more courses in Working in Teams, Troubleshooting, Monitoring Quality or Development and Use of Standard Operating Procedures. The training supports the Company's quality assurance program and aims to support existing certifications from the FDA regarding conducting Trials and Tests while improving processes related to making gene therapy products. Company specific standards are also part of the training and will be delivered as required according to occupation.

Computer Skills: All occupations will receive one or more courses in Using Applications and Reporting. The Company is implementing several quality assurance systems and must upgrade staff skills across the organization to meet internal and external process requirements in order to meet standards and remain competitive.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0477	San Francisco	06/06/2016-06/05/2018	\$411,840	*\$411,840 (100%)

*This amount is a projection of earnings based on the hours tracked on ETP online tracking system and the invoice submitted. The invoice is currently under review by ETP.

DEVELOPMENT SERVICES

Audentes retained Steve Duscha Advisories in Sacramento to assist with development of this proposal for a flat fee of \$17,500.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories will also perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

Trainers will be identified for ETP record-keeping purposes as they are retained by Audentes.

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

8-200 Trainees may receive any of the following:

COMMERCIAL SKILLS**Clinical Trials**

- + Creating and following standard operating procedures
- + Following Good Clinical Practice
- + Following regulations for clinical trials
- + Conducting site qualification visits to assess clinical trial sites
- + Working with clinical research organizations
- + Monitoring and auditing clinical trials
- + Managing investigational supplies
- + Documenting clinical trials
- + Identify, assessing, and implementing appropriate corrective actions
- + Managing local labs and supplies
- + Reporting adverse events
- + Creating protocols for preclinical animal studies
- + Analyzing pre-clinical data

Process Development

- + Developing processes for production of gene therapy vectors
- + Assessing equipment needs
- + Equipment procurement and layout
- + Optimizing cell growth and productivity
- + Using bioreactors
- + Developing downstream processing steps and methodology to ensure high yield, potency and purity
- + Producing research drug products for animal studies
- + Evaluation procedures of production process
- + Working in a Good Manufacturing Practice environment
- + Meeting regulatory requirements
- + Integrating processes
- + Managing production of research drug products
- + Assessing and implementing new manufacturing technologies

Program Management

- + Managing drug product development
- + Developing project plans
- + Setting timelines
- + Budgeting
- + Contingency planning
- + Risk mitigation
- + Tracking milestones
- + Managing internal and external partners
- + Managing suppliers

- ✚ Reporting
- ✚ Managing supply chains
- ✚ Managing inventory
- ✚ Record keeping
- ✚ Warehouse management
- ✚ Sourcing raw materials and equipment
- ✚ Meeting regulatory requirements

Research and Development

- ✚ Conducting assays
- ✚ Assays to detect residual impurities
- ✚ Assays for titration and residual impurity quantification
- ✚ Cell-based in-vitro potency assays for products
- ✚ Biochemical assays
- ✚ Shake flask culturing
- ✚ Cell line maintenance
- ✚ Mammalian cell transfection
- ✚ Mammalian cell transduction
- ✚ Fluorescent microscopy
- ✚ Supply management
- ✚ Preparing standard operating procedures
- ✚ Optimizing Adeno-Associated Virus vector production and potency
- ✚ Standardizing assays for vector genome production
- ✚ Vector system design
- ✚ Engineering cells for performance
- ✚ Evaluating production experiments and system designs
- ✚ Isolation and characterization of stable cell lines
- ✚ Developing novel assays to assess viral vector attributes based on nucleic acid chemistry
- ✚ Using analytical assays to support process development
- ✚ Developing and maintaining laboratory quality control systems and reports
- ✚ Coordinating internal and external research activities
- ✚ Creating reference standards

Production

- ✚ Meeting FDA standards for commercial manufacturing
- ✚ Demonstrating reproducibility
- ✚ Producing products in shake flasks and bench-scale bioreactors
- ✚ Developing and implementing process sampling plan to monitor process development
- ✚ Interpreting analytic data from in-process and final production quality data
- ✚ Process optimization
- ✚ Creating pilot production scale cell culture operations
- ✚ Preparing cell culture media and reagents
- ✚ Sterile handling
- ✚ Monitoring and sampling of lab scale cultures
- ✚ Scheduling research scale production batches
- ✚ Selecting and implementing new technologies and instrumentation
- ✚ Generating and managing laboratory documentation

- ✚ Managing data
- ✚ Troubleshooting operations
- ✚ Performing cell culture activities
- ✚ Thawing, feeding, passaging, cell banking, transfecting and harvesting cell lines
- ✚ Qualifying equipment and instruments
- ✚ Calibrating and maintaining equipment and instruments
- ✚ Creating manufacturing policy and procedures
- ✚ Creating documentation systems
- ✚ Following Good Manufacturing Practices and ISO requirements
- ✚ Set-up, inspection and use of production equipment
- ✚ Establishing and following safety protocols
- ✚ Developing and implementing corrective action plans related to products
- ✚ Installing and using control and automation systems
- ✚ Designing, engineering, and commissioning of new systems
- ✚ Conducting trial runs
- ✚ Creating qualifying lots
- ✚ Minimizing process deviations and unplanned equipment downtime
- ✚ Transferring cell culture and purification technologies from development into production
- ✚ Starting up the production facility
- ✚ Starting up and qualifying equipment

Quality Control

- ✚ Developing and using standard operating procedures for quality functions
- ✚ Analyzing and interpreting test results
- ✚ Identifying deviations
- ✚ Conducting equipment qualification and validation studies
- ✚ Testing raw materials for conformance
- ✚ Quality assurance during design, commission, validation and startup of new manufacturing processes and facilities
- ✚ Resolving discrepancies
- ✚ Implementing change control policies

Maintenance

- ✚ Managing calibration and calibration services
- ✚ Creating standard operating procedures for planned maintenance
- ✚ Creating standard operating procedures for repairs
- ✚ Develop calibration testing procedures for temperature, pressure, level, flow and analytical instruments
- ✚ Testing electronic components to determine functionality level and capacity
- ✚ Maintaining records
- ✚ Maintaining mechanical systems
- ✚ Preventive maintenance
- ✚ Troubleshooting
- ✚ Conducting safety checks
- ✚ Setting up and testing equipment

Facility Process Validation Readiness

- + Food and Drug Administration validation for manufacturing
- + Project planning skills
- + IT business systems requirements
- + IT quality systems requirements
- + Reporting requirements
- + Policy documents
- + Testing systems
- + 100% validation assessment
- + Identifying quality assurance gaps
- + Identifying procedural gaps

CONTINUOUS IMPROVEMENT

- + Development and use of standard operating procedures
- + Monitoring quality
- + Measuring reproducibility
- + Working in teams
- + Troubleshooting
- + Corrective Strategies

COMPUTER SKILLS

- + Using business systems
- + Using IT quality systems
- + Enterprise systems
- + Applications
- + Reporting

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:

Columbus Manufacturing, Inc.

Agreement Number: ET19-0124

Panel Meeting of: June 22, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: C. Hoover

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 354	U.S.: 372	Worldwide: 372
<u>Turnover Rate:</u>	4%		
<u>Managers/Supervisors:</u> (% of total trainees)	10%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)		(High Earner Reduction)	=	Total ETP Funding
\$229,580		\$0		\$0		\$229,580

In-Kind Contribution:	100% of Total ETP Funding Required	\$351,330
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills, HazMat, Literacy Skills, PL-Mfg. Skills	318	8-200	0	\$650	\$18.22
				Weighted Avg: 25			
2	Job Creation Priority Rate Retrainee	Business Skills, Cont. Imp., Mfg. Skills, HazMat, Literacy Skills, PL-Mfg. Skills	40	8-200	0	\$572	\$15.18
				Weighted Avg: 22			

Minimum Wage by County: Job Number 1: \$18.22 for Alameda County

Job Number 2 (Job Creation): \$15.18 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 Number 1; and up to \$0.04 per hour in Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Production Staff		193
Plant Operations		90
Managers		35
Job Number 2		
Production Staff		35
Plant Operations		5

INTRODUCTION

Founded in 1917, Columbus Manufacturing, Inc. (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 includes 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.

Columbus' new product offerings of antibiotic-free salami and deli meat, newly redesigned salami and bulk-deli meats packaging, salami snacks and panino (salami rolled in cheese), resulted in the Company's 2017 processing facility expansion. This expansion added 10,845 square feet, now accommodating an additional six million pounds of production.

As a result, Columbus will increase daily production shifts from two to three resulting in a total of 21 hours of daily production. It plans to hire 100 new plant workers over the next two years.

To meet its increased production capacity, Columbus is rolling out new training programs, Ambassador Program (Plant Operations) and a Leadership Academy (Production Staff). The mandatory Ambassador Program will increase proficiency on the plant floor, developing workers into subject matter experts. The Leadership Academy will be offered to select Production Staff, in management, communication and team-building skills to support its future company leaders.

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.

Columbus will hire 40 new employees (Job Number 2) to meet expanded production needs. 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. Facilities have been expanded to accommodate the new employees.

PROJECT DETAILS

Training Plan

The following will be delivered in Class/Lab, Productive Lab (PL) and E-Learning:

Business Skills: Training will be offered to Production Staff and Managers to improve product knowledge, team building, decision making, delegation, project management and communication skills. This will result in improved efficiencies, job retention and allow employees to grow with the Company.

Continuous Improvement: Training will be offered to Plant Operations and Production Staff and focus on problem-solving methodologies and enhancing productivity. Training in Lean, Agile and other methodologies will help find areas of waste and implement resources effectively.

Management Skills: Training will be offered to Managers be more effective in managing employees and projects, creating efficient leaders.

Manufacturing Skills: Training will be offered to Plant Operations and Production Staff in peeling, fermentation, chopping, grinding and stuffing of salami. Training will also be delivered in correct operation of complex machinery and to meet Columbus' stringent food safety (British Retail Consortium standards). Training will allow Columbus to meet the increase in production demand while maintaining manufacturing best practices and delivering a quality product.

Hazardous Materials: Training will be offered to Plant Operations and Production Staff. Columbus' maintenance teams and its Emergency Response Team, made up of volunteers

across the organization (specifically Production Staff and sanitation employees out of Plant Operations), ensure safe handling of hazardous materials.

Literacy Skills: Training will be offered to Production Staff who lack proficient English skills to move to the next level in their careers. Job-related English as a second language skills will allow employees to follow through on detailed tasks, better perform job functions, leading to promotional opportunities.

Productive Laboratory

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

PL Manufacturing Skills training will be delivered to 250 Production Staff. PL training is needed to properly perform machine operation and maintenance resulting in less repairs and improved longevity. This PL training increases productivity resulting in increased output and reduced waste.

The majority of the PL training will be delivered with a trainer-to-trainee ratio of 1:1; however, a 1:2 ratio is necessary when two new employees are hired at the same time. Additionally, the two trainees will encounter different issues allowing them to learn from each other's experiences and questions. Each trainee will receive approximately 40 hours of PL training.

Temporary to Permanent Hiring

Columbus intends to train 30 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 one month. These workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled until after they have been hired by Columbus 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

Columbus currently spends \$350,000 per facility on training annually in California. Training includes leadership, literacy, manufacturing, continuous improvement, business and computer skills. VESL is elective training, but on-the-job training is mandatory. The Company uses Class/Lab, OJT, Computer-Based Training (CBT), and Productive Lab (PL) methods to deliver job specific and company-wide 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 Learning and Development Manager will oversee administration of this project with assistance from the two Human Resource (HR) Business Partners at each facility. The Learning and Development Manager, HR Business Partners and Supervisors will schedule

training, enroll trainees, track training hours and meet with ETP staff. Columbus has hired a third-party vendor, RSM US LLP to help with the uploading hours, enrollment, and invoicing. Training will be delivered by in-house experts and vendors as needed.

Electronic Recordkeeping

Columbus will use a Learning Management System (LMS), Alchemy, to document all ETP training even though paper rosters will also be used for some types of training. The LMS system has been reviewed and approved by ETP.

Impact/Outcome

This ETP-funded training program will help Columbus' employees grow within the Company. At the end of the ETP program, employees will receive internal certifications for completing the Leadership Academy and the Ambassador Program. Forklift and pallet-jack certifications will also be obtained.

BCR is the global standard for food safety, and is regarded as the benchmark for compliance to best practice in food industry standards. Columbus is BRC certified. ETP funds will assist in maintaining the Company's AA status (highest rating available) and its culture of safety.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

RSM US LLP in Los Angeles assisted with development for a flat fee of \$1,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

Dawn Garzoli (Garzoli Consulting) of Petaluma will provide Business Skills training for a fee of \$10,000.

Bryan Gillette (Summiting Group) of Pleasanton will provide Business Skills training for a fee of \$10,000. Other trainers will be identified for ETP record-keeping purposes.

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- + Production Management
- + Communication & Collaboration Skills
- + Accounting and Finance
- + Cross-Functional Teams
- + Time Management & Prioritization
- + Change Management
- + Getting and Giving Respect
- + Creative Problem Solving
- + Coaching for Commitment
- + Product Knowledge

CONTINUOUS IMPROVEMENT

- + Total Productive Manufacturing
- + Quality Good Manufacturing Processes
- + Quality Control/Quality Assurance
- + Root Cause Analysis

MANAGEMENT SKILLS (Managers Only)

- + Communication & Collaboration Skills
- + Finance and Accounting
- + Cross-Functional Teams
- + Time Management & Prioritization
- + Change Management
- + Getting and Giving Respect
- + Creative Problem Solving
- + Coaching for Commitment

MANUFACTURING SKILLS

- + Peeling
- + Wrapping
- + Coating
- + Feeding
- + Debugging
- + Slicing
- + Salami Stuffing
- + Shipping & Receiving
- + Salami Chopping
- + Sanitation
- + Fermentation
- + Grinding System/Chopper Machine Operation
- + High Pressure Processing Machine Operation
- + Automated Guided Vehicles Operation
- + Pallet-Jack Certification
- + Forklift Certification
- + Safety Training

HAZARDOUS MATERIALS

- ✚ Blood-Borne Pathogens
- ✚ Chemicals
- ✚ Hazard Communication
- ✚ Hazardous Material Handling

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

LITERACY SKILLS

- ✚ Vocational English as a Second Language

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

Productive Lab Hours

0 – 40

MANUFACTURING SKILLS (Ratio 1:2)

- ✚ Peeling
- ✚ Wrapping
- ✚ Coating
- ✚ Feeding
- ✚ Debugging
- ✚ Slicing
- ✚ Salami Stuffing
- ✚ Shipping & Receiving
- ✚ Salami Chopping
- ✚ Sanitation
- ✚ Grinding System/Chopper Machine Operation
- ✚ High Pressure Processing Machine Operation
- ✚ Automated Guided Vehicles Operation

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



TRAINING PROPOSAL FOR
Archer-Daniels-Midland Company
17-0909

Panel Meeting Date: 06/22/2018
Regional Office: Sacramento Regional Office
Analyst Name: Jana Lazarewicz
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

Provided here is a summary of the funding for the proposed Training Project.

TOTAL ETP FUNDING: \$355,446.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$355,446.00	N/A	\$0.00	\$400,000.00

APPLICANT PROFILE

Company Summary	Archer-Daniels-Midland Company (ADM) is an agricultural processing and distribution company specializing in products for food, animal feed, industrial and energy uses. ADM also provides agricultural storage and transportation services.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 400	US: 17,000	World Wide: 30,000
Turnover Rate (Applicant)	0.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	Bakery, Confectionery, Tobacco Workers & Grain Millers Local 37; International Longshore & Warehouse Union Local 6		

TRAINING PROFILE

Training Objective(s)	ADM has experienced significant growth in domestic and international markets. To meet customer demand, training will focus on improving production processes, quality standards, and food safety requirements.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	441	\$26.00	31	\$806	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

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 products 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.

ADM will serve as the lead employer in this proposal with two closely related affiliates: ADM Milling Co. and Specialty Commodities, Inc. Training under this proposal will include 10 locations in Colusa (1); Fresno (1); Los Angeles (3); San Bernardino (1); San Joaquin (3); and Stanislaus (1) counties.

This will be ADM's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>ADM reports an increase in demand for agricultural food processing services. Many large food manufacturing companies look to ADM for their food ingredients. Staff must possess the skills necessary to meet customer needs and maintain quality standards. To keep up with customer demands and future business needs, the Company developed a training plan to enhance staff development, improve production efficiency, and maintain food safety requirements.</p> <p>ADM recently implemented new standard operating procedures. New procedures will require the Company to provide its workers with operational and process improvement skills training. Courses in Good Manufacturing Practices, Quality Compliance, and Lean Manufacturing will increase trainee knowledge in operational effectiveness and waste elimination.</p> <p>In addition, employee training and development is consistently needed to ensure the quality and production of food meets strict compliance and health regulations. Courses in Hazard Analysis and Critical Control Points, Safe Quality Food, and Good Agricultural Practices will ensure trainees are qualified to produce and distribute safe, quality food for consumers.</p>
Training Infrastructure and Administrative Plan	<p>The Human Resources Manager and Director of Learning and Development will plan, schedule, and ensure all aspects of training are uniformly implemented across all participating locations. Each participating location has a designated staff member to facilitate training. Additionally, the Company has engaged the services of a third-party administrator to work closely with staff to complete the project successfully.</p> <p>Training will be delivered by in-house experts.</p>

PROPOSED TRAINING PROJECT DETAILS

Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

A summary of the curriculum is provided below. See *Attachment 2 - Training Delivery and Curriculum Listing* for more details.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training in Manufacturing Skills topics under Attachment 2, Exhibit B.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
All occupations identified will receive training in Business, Continuous Improvement, and Management Skills topics under Attachment 2, Exhibit B.	

4. Additional Company or Training Project Details

Learning Management System

Staff has reviewed and approved ADM's use of a Learning Management System for recordkeeping.

Union Support

Union support letters from Bakery, Confectionery, Tobacco Workers & Grain Millers Local 37 and International Longshore & Warehouse Union Local 6 for non-management workers at ADM Milling Co. (Los Angeles) and ADM (Lodi) have been received.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

ADM has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Strategic Partnerships LLC	Alexandria, VA	No fee

PROPOSED TRAINING PROJECT DETAILS

Administrative	Strategic Partnerships LLC	Alexandria, VA	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the training, curriculum and proposal characteristics.

Attachment 2 - Training Delivery and Curriculum Listing

Provided below are details on the types of training planned for this proposed Training Project.

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Safety)	Excavation Safety
	Safety Observation Reports
	Values Based Safety (VBS)
Manufacturing Skills (ME) (Standard)	Allergen Awareness and Control
	Chemical Control
	Cleaning and Sanitizing
	Food Defense and Plant Security
	Food Safety Awareness
	Foreign Materials Control
	Good Agricultural Practices (GAP)
	Good Manufacturing Practices (GMP)
	HACCP
	Labeling Lot Control and Traceability
	Lean Manufacturing
	Management Commitment & Quality Policy
	Non Conforming Product and HOLD
	Quality Plan
	Raw Material and Supplier Control
	Regulatory Quality Compliance
	Safe Quality Food (SQF)
	Specification Quality Compliance
	Storage Warehousing and Transportation

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	Fundamentals of Communication	1.00
	Planning, Meet, Fit, Purpose	1.00
	Reaching Goals Using Perseverance and Resilience	1.00
	Solving Problems	1.00
	Turning Around Problems and Reverse Brainstorm	1.00
	Working with Agility	1.00
Continuous Improvement Skills	Generating Creative and Innovative Ideas	1.00
	Implementing and Sustaining Change	1.00
	Implementing and Sustaining Process Improvement	1.00
	Introduction Lean for Service and Manufacturing	1.00
Management Skills	Establishing Team Goals Using Feedback Effectively	1.00
	Facing Challenges as a First Time Manager	1.00
	Management Essentials: Delegating	1.00

Attachment 2 - Training Delivery and Curriculum Listing

Provided below are details on the types of training planned for this proposed Training Project.

	Management Essentials: Developing Your Direct Repo	1.00
	Management Essentials: Difficult Employee Behavior	1.00
	Management Essentials: Managing a Diverse Team	1.00
	Understanding a Manager Role	1.00



LOCAL 37

Bakery, Confectionery, Tobacco Workers & Grain Millers'

INTERNATIONAL UNION AFL-CIO, CLC

6801 E. WASHINGTON BOULEVARD, CITY OF COMMERCE, CALIFORNIA 90040
TELEPHONE (323) 722-3790 * FAX (323) 722-9886



February 22, 2018

Greg Saloka
Sr. Employee and Labor Relations Rep.
Archer Daniels Midland Company
4666 Faries Parkway
Decatur, IL 62526-5630

Re: Union Support for ADM Application for California Employment Training Panel (ETP) Funds

Dear Greg:

I received your request for Union support regarding ADM's application for California Employment Training Panel (ETP) funds.

Bakery, Confectionery, Tobacco Workers, and Grain Millers International Union, Local Union No. 37, is supportive of ADM applying for the ETP funds program. We understand that the California Employment Training Panel (ETP) is a business and labor supported state agency that assists companies in upgrading the skills of their workforce enabling them to remain competitive. The training received under this program will assist ADM to upgrade the skills of their workforce.

Sincerely,

Gregory May
President
BCTGM Local 37

cc File copy



Warehouse Union Local 6

INTERNATIONAL LONGSHORE & WAREHOUSE UNION

99 HEGENBERGER ROAD, OAKLAND, CA 94621-1485 • (510) 638-5605 • 1-800-864-8302 • FAX: (510) 638-3297

February 27, 2018

To Whom It May Concern:

The ILWU Local #6 is supportive of Archer Daniels Midland Company applying for the California Employment Training Panel (ETP) program. We understand that the ETP program is a business and labor supported state agency that assists companies in upgrading the skills of their workforce enabling them to remain competitive. The training received under this program will assist Archer Daniels Midland to upgrade the skills of their workforce.

Sincerely,

Corey Tacconi

Corey Tacconi
Business Agent



RETRAINEE - JOB CREATION

Training Proposal for:

Bigham Services, Inc.

Agreement Number: ET19-0100

Panel Meeting of: June 22, 2018

ETP Regional Office: Sacramento

Analyst: D. Jordan

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SET Job Creation Initiative Veterans	Industry Sector(s):	Construction Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Contra Costa, Sonoma	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 111	U.S.: 111	Worldwide: 111
<u>Turnover Rate:</u>	14%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$249,132		\$0	\$0		\$249,132

In-Kind Contribution:	100% of Total ETP Funding Required	\$481,500
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials, OSHA 10/30, PL - Commercial Skills	101	8 - 200	0	\$1,612	\$22.77
				Weighted Avg: 62			
2	Retrainee Job Creation Initiative SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials, OSHA 10/30, PL - Commercial Skills	30	8 - 200	0	\$2,340	*\$13.66
				Weighted Avg: 90			
3	Retrainee Veterans SET Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials, OSHA 10/30, PL - Commercial Skills	10	8 - 200	0	\$1,612	\$22.77
				Weighted Avg: 62			

*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/Priority: Job Numbers 1 & 3: \$22.77 per hour in Sonoma and Contra Costa County; Job Number 2: \$13.66 per hour in Sonoma County and \$15.18 per hour in Contra Costa County.

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

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

Job Numbers 1 & 3: up to \$2.42 per hour may be used to meet the Post-Retention Wage.

Job Number 2: up to \$0.66 per hour may be used to meet the Post-Retention Wage in Sonoma County. Up to \$2.18 per hour may be used to meet the Post-Retention Wage in Contra Costa County.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Sales Staff		18
Frontline Supervisors		11
Technical Installers		30
Technicians		42
Job Number 2		
Sales Staff		2
Frontline Supervisors		1
Technical Installers		7
Technicians		20
Job Number 3		
Technical Installers		2
Technicians		8

INTRODUCTION

Founded in 1990 and headquartered in Santa Rosa, Bigham Services, Inc. (Bigham) (www.onehourheatandac.com) 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.

Need For Training

CA Title 24 has mandated energy efficiency levels to be more efficient than 2008 standards. There is substantial emphasis placed on creating more energy efficient systems, including new technologies and components within heating and air-cooling systems, ventilation, and duct work. Trainees must be properly trained to diagnose, install and repair these systems, along with requisite tooling and materials ancillary to their job. ETP-funded training will focus on continual updated and mandated requirements for CA Title 24 and changes that have taken place within the Company.

Training will also focus on equipment that includes mini-splits, inverter technology, smart systems, solar, AC compressors and digital test equipment. Staff will also receive training on new software Profit Rhino and Voice Over Internet Protocol, sales procedures, presentation and negotiation skills. With the changes in technology, trainees will need a higher level of skills in customer service and transaction process skills.

ETP funding will allow workers to better support customer demands and overall business growth.

Veterans Program

The Panel provides a higher reimbursement rate and modified retention period for training California veterans. Bigham plans to train 10 Veterans (Job Number 3). The Company is not requesting a modified retention period for Veterans.

Retrainee - Job Creation

Bigham has committed to hiring 30 new employees (Job Number 2). Hiring these trainees will assist to maintain superior customer service. Bigham's addition to residential electrical services has led to significant growth and has seen an increase in customer demand. The addition of these trainees will enable the Company to sustain consistency with scheduling of appointments during their peak season and handle the demand from new residential customers. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

PROJECT DETAILS

Training Plan

Class/Lab training will be provided by in-house subject matter experts in the following:

Business Skills: Training will be delivered to Sales Staff and Technical Installers. Training will include Sales Procedures and Strategies, Presentation Skills, and Negotiation Skills. Training will also include changes in requirements of CA Title 24.

Commercial Skills: Training will be delivered to Technicians, Technical Installers and Sales Staff. Training will focus on technology and methodology regarding the changes pursuant to CA Title 24 and competencies required for electrical and solar tasks. Training topics include Thermal Dynamics, Metering Devices, Insulating Methodologies, and Residential Indoor Air Quality/Testing.

Computer Skills: Training will be delivered to all occupations. Training will focus on new mobile tablets in all aspects in relation to their job duties. Training will also be on advanced Microsoft Office and Regulatory Code Research Techniques to ascertain code parameters in regards to building codes.

Continuous Improvement: Training will be delivered to all occupations. Training will focus on improving the overall efficiency of the business. Training topics include Quality Control/Systems, Team Building, and Root Cause Analysis.

Hazardous Materials Skills: Training will be delivered to Technicians, Technical Installers and Sales Staff. Training will focus on the understanding of materials and disposal methods. This training is highly technical and meets all industry and OSHA governmental standards.

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

Productive Laboratory (PL)

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

Training will be delivered to Technicians and Technical Installers. When paired with classroom training, PL is the best training technique for trainees. Trainees will work with a trainer who will explain and demonstrate step-by-step instructions, then observe trainees performing these tasks. Training will consist of courses in Ventilation Systems, Air Quality Diagnostics and Methodologies, Thermal Dynamics, Copper Pipe and Fittings, and Thermostats. Production will be affected because an experienced technician will be used to train and observe trainees. Bigham will provide

up to 60 hours for PL-Commercial skills training at a 1:2 trainer-to-trainee ratio, as installation of heat pumps and air conditioning units require 2 technicians to perform the task.

Commitment to Training

Bigham allocates approximately \$387,000 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

Bigham has a detailed training plan in place and is ready to begin training upon approval. The Company's HR Manager and two administrative staff members will oversee this training project. In addition, the Company has retained the services of Synergy Management Consultants, LLC to assist with administration. Training will be delivered by in-house experts, and vendors to be determined later.

Green/Clean Operations

Bigham works with, and installs, new green/clean technology HVAC systems within residential spaces.

Nanotechnology

Bigham uses nanotechnology to eliminate the use of common refrigerants such as CFC/HCFC. The technology harnesses nano particles and doesn't use cooling agents like fluorocarbons.

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.

DEVELOPMENT SERVICES

Bigham retained Synergy Management Consultants, LLC in Grass Valley to assist with development of this proposal for a flat fee of \$17,843.20.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Acumen For Leaders
- Coaching for Leaders
- Communication Skills
- Conflict Management
- Customer Needs Assessment and Relationship Building
- Customer Service Skills
- Development Plans for Subordinates
- Dispatch Procedures
- Equipment and Industry Overview
- Finance For Leaders-Budgeting, Forecasting and Planning
- Finance/Accounting Skills
- HVAC Product Knowledge for Non Technicians
- Leading Teams
- Logistics Skills
- Maintenance/Membership Programs
- Marketing
- Memberships
- Motivating Staff
- Negotiation Skills
- Payments Refunds Credit Cards Financing
- Presentation Skills
- Product Knowledge for Non Technicians
- Product Knowledge/Offerings
- Sales Procedures and Strategies
- Understanding Personality Types

COMMERCIAL SKILLS

- Air Conditioning Systems
- Air Quality Diagnostics and Methodologies
- Barriers Methodologies
- Building
- Completing Material Safety Data Sheets
- Demolition
- Designing
- Digital Tools
- Digital Tools Gauges
- Electrical
- Electrical Components and Devices
- Electrical Fundamentals
- Electrical Safety and Tools
- Field Tools/Gauges
- Fundamentals of Solar Technology
- Heat Pump/Furnace Systems

- High Voltage/Low Voltage Systems
- Insulating Methodologies
- Inverter Technology
- Inverter Type Motors
- Lighting
- Maintenance Parts/ Supplies –Inventory Management
- Metering Devices
- Motors
- New Construction
- Reading Electrical Drawings, Fixture Schematics
- Renovations
- Repairs
- Residential Electrical Systems
- Residential Indoor Air Quality/Testing
- Service
- Solar Skills
- Switches and Electrical Components
- System Controls/Smart System Controllers
- Thermal Dynamics
- Thermostats
- Trouble Shooting Electrical Systems/Components
- Tune up Procedures
- Ventilation Systems
- Wireless Technologies/Controls
- Wiring
- Wiring- Conduits, Cables and Connectors

COMPUTER SKILLS

- Payment Card Certification
- Profit Rhino
- Regulatory Code Research Techniques
- Tablet Computer Applications
- Voice Over Internet Protocol

CONTINUOUS IMPROVEMENT

- Change Management Skills
- Team Building
- Kaizen Event Strategy and Implementation
- Leadership Skills
- Lean Concepts
- Problem Solving Skills
- Project Management Skills
- Quality Control/Systems
- Root Cause Analysis
- Time Management Skills

HAZARDOUS MATERIALS

- Emergency Response and Clean Up
- Coolant Systems-Evac and Weigh in Procedures
- Handling Hazardous Materials

- HAZ Mat Safety
- Registration, Evaluation, Authorization & Restriction of Chemical Substances

OSHA (WITH OSHA CERTIFIED INSTRUCTOR)

- OSHA 10 (Requires 10 hours completion)
- OSHA 30 (Requires 30 hours completion)

PL Hours

0 – 60

COMMERCIAL SKILLS (PL) (limited ratio 1:2)

- Air Conditioning Systems
- Air Quality Diagnostics and Methodologies
- Barriers Methodologies
- Cast Iron Pipe and Fittings
- Copper Pipe and Fittings
- Corrugated Stainless Steel Tubing
- Customer Engagement/Retention
- Diagnostics
- Digital Tools
- Drawings/Plans
- Gas and Fuel Systems
- Heat Pump Systems
- Inverter Type Systems
- Metering Devices
- Motors
- Pipes and Fittings (plastic) Including Install
- Scheduling/Logistics
- Solar Replacement
- Switches and Electrical Components
- System Controls/Smart System Controllers
- Thermal Dynamics
- Thermostats
- Tune up Procedures
- Ventilation Systems
- Venting
- Whole Home Fans
- Wiring

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:

Esurance Insurance Services, Inc.

Agreement Number: ET19-0118

Panel Meeting of: June 22, 2018

ETP Regional Office: Sacramento

Analyst: K. Mam

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Veterans	Industry Sector(s):	Insurance Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Placer, San Francisco	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 2,697	U.S.: 31,800	Worldwide: 35,000
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	22%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$240,248		\$0	\$0		\$240,248

In-Kind Contribution:	100% of Total ETP Funding Required	\$250,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp., Mgmt. Skills	700	8-200	0-7	\$230	\$16.70
				Weighted Avg: 10			
2	Retrainee Job Creation	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp., Mgmt. Skills	75	8-200	0-7	\$1,040	*\$13.66
				Weighted Avg: 40			
3	Retrainee Veterans	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp.	4	8-200	0-7	\$312	\$16.70
				Weighted Avg: 12			

*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 & 3 (Retrainee/Veterans): \$16.70 per hour for Placer County and \$18.22 per hour for San Francisco County.

Job Number 2 (Job Creation): \$13.66 per hour for Placer County and \$15.18 per hour for San Francisco County.

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

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

Although health benefits are provided, they are not being used to meet Post-Retention Wages.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 (Retrainee)		
Claims Associate		170
Manager		172
Sales Associate		7
Information Technology		168
Billing and Finance		30
Human Resources		20
Product Staff		76
Marketing Staff		24
Legal Staff		33

Job Number 2 (Job Creation)		
Claims Associate		30
Manager		5
Sales Associate		10
Information Technology		2
Billing and Finance		3
Human Resources		5
Product Staff		5
Marketing Staff		10
Legal Staff		5
Job Number 3 (Veterans)		
Claims Associate		2
Billing and Finance		2

INTRODUCTION

Founded in 1998 and headquartered in San Francisco, Esurance Insurance Services, Inc., a subsidiary of the Allstate Corporation (Esurance) (www.esurance.com), 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 location will participate in training.

The facilities in San Francisco and Rocklin, provide significant internal support services to Esurance locations in other states (greater than 25% of workload).

PROJECT DETAILS

This will be Esurance's fourth Agreement, and the third in the last five years. In this proposal, the Company will provide training to improve the customer service experience. Although training topics are similar to those provided in the prior Agreement, trainees will not repeat the same training courses.

The Company has a new marketing campaign focused on providing products and services for the modern world. Staff will receive training on how to maximize customer interaction through text, web, social and live chats. Training will increase workers customer service skills by providing engagement with customers through multiple connections.

The Company has also invested over \$700K on new computers and software including upgrading to Windows 10 and Office 365. Staff will train on new systems and technology which will streamline engagement to provide staff with the skills to meet service expectations.

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.

Due to Esurance's new marketing campaign, the Company is experiencing an increase in sales and is expecting continued growth in both consumer and workforce. To keep up with this growth and ensure the campaign operates efficiently, Esurance invested in new equipment and software. The Company will hire 75 new employees (Job Number 2). Occupations include Claims Associates, Managers, Sales Associates, Information Technology, Billing and Finance, Human Resources, Product Staff, Marketing Staff and Legal Staff at both locations. 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.

Veterans Program

Esurance will train four veterans (Job Number 3). Esurance actively recruits veterans through their in-house EVETS program (<https://www.esurance.com/company/community>). This program was designed to create career development opportunities for former military personnel and promote awareness of veterans' issues in the community.

Training Plan

Training will be delivered via Classroom/Laboratory and Computer Based Training (CBT) methods in the following:

Business Skills: Training will be offered to all occupations and focus on improving project management. Training topics include File Handling and Documentation, Project Management and Change Management.

Commercial Skills: Training will be offered to all occupations and focus on improving internal processes. Training topics include Auto Fundamental Skills, Claims Overview and Auto Policy Overview.

Computer Skills: Training will be offered to all occupations and focus on upgraded software. Training topics include Esurance Systems and Application, Claims Technology and Life Cycle Management System.

Continuous Improvement: Training will be offered to all occupations and focus on increasing customer satisfaction. Training topics include Driving Performance, Interpersonal Skills and Building Rapport.

Management Skills: Training will be offered to Managers. Training will focus on increasing leadership skills. Training topics include Situational Leadership and New Manager Program.

Computer-Based Training

CBT will be provided to supplement class/lab training. All trainees will receive approximately seven hours of CBT.

Managers/Supervisors

Funding for Manager and Supervisor training is capped at 20% of the total training hours. However, the Panel may approve additional hours on a case-by-case basis, not to exceed 40%. Esurance requests an increase to 22% management training. The Company's management team plays a critical role in sustaining the organizational growth and human capital.

Commitment to Training

Esurance invests \$800,000 per facility annually for training that includes compliance training, company orientation, and departmental 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

Esurance has a detailed plan to administer training and is ready to begin upon approval. The Project Manager (Roseville) and Project Sponsor (San Francisco) will oversee all training and administration for both locations. Esurance will utilize a Learning Management System (LMS) to document training over the course of the Agreement. Training will be delivered by in-house experts and vendors as needed.

Learning Management System

Staff has reviewed and approved the Company's use of an LMS for recordkeeping.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0382	Rocklin, San Francisco	03/07/16 – 03/06/18	\$204,620	\$54,506 (27%)*
ET13-0408	Rocklin, San Francisco	06/24/13 – 06/23/15	\$494,480	\$180,118 (36%)

*ET16-0382: Based on ETP Systems, 12,822 reimbursable hours have been tracked for potential earnings of \$204,620 (100% of approved amount). The Contractor expects to earn 100% after fiscal closeout.

ET13-0408: The training plan was based primarily on a new facility scheduled to open in California. However, the Company decided not to open the new location. Thus, Esurance did not complete much of the planned training for workers to operate the new facility.

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

- Audit Training
- Change Management
- Coaching for Success
- Comparative Negligence
- Diversity & Inclusion
- File Handling and Documentation
- Negotiation Skills
- Project Management

COMMERCIAL SKILLS

- Auto Fundamentals Skills
- Auto Policy Overview
- Claims Overview
- ClaimsCentral and XPM
- Fraud Training
- Liability Training
- Material Damage
- Motorcycle Knowledge

COMPUTER SKILLS

- Advanced Safety Systems
- Case Management Tool
- Claims Technology
- Esurance Systems and Application
- File Handling & Documentation
- Life Cycle Management System
- Microsoft Office 365 (Intermediate/Advanced)
- Video Appraisal
- Windows 10 Integration

CONTINUOUS IMPROVEMENT

- Avoiding And Resolving Conflict
- Building Rapport
- Consulting Skills
- Cross Training
- Driving Performance
- Interpersonal Skills
- Presentation Skills

MANAGEMENT SKILLS (Managers only)

- Advanced Leadership
- Coaching Skills
- Crucial Accountability
- Emerging Leader
- Leadership and Team Building

- New Manager Program
- Situational Leadership

CBT Hours

0–7

BUSINESS SKILLS

- Business Planning (1 hour)
- Diversity and Inclusion (1 hour)
- Probability and Statistics (1 hour)
- Project Management (2 hour)
- Project Scope (2 hour)
- Sales and Service Overview (1 hour)
- Six Sigma (2 hour)

COMMERCIAL SKILLS

- Automotive Training (1 hour)
- CCCOne Application (1 hour)
- ClaimsCentral (1 hour)
- Coverage Analysis (30 Minutes)
- Fraud Awareness Training (1 hour)
- Insurance terms (30 Minutes)
- Material Damage (30 Minutes)
- Policy and Claims Overview (1 hour)

COMPUTER SKILLS

- Agile Programming and Testing (2 hour)
- Application Design and Configuration (1 hour)
- Esurance Systems (1 hour)
- Java, C++, SQL (2 hour)
- Microsoft Office (Intermediate) (1 hour)
- Microsoft Windows Server (1 hour)
- SharePoint, Oracle and Cisco (1 hour)

CONTINUOUS IMPROVEMENT

- Anger Management (1 hour)
- Building Better Relationships (30 minutes)
- Coaching For Success (1 hour)
- Consulting Training (30 minutes)
- Critical Thinking (1 hour)
- Negotiation Essentials (1 hour)
- Talent Management (1 hour)

MANAGEMENT SKILLS (Managers only)

- Building and Leading Teams (1 hour)
- Communicating a Shared Vision (1 hour)
- Engaging Top Performers (1 hour)
- Leading Teams (1 hour)
- Managing Virtual Teams (1 hour)
- Mentoring Skills (1 hour)
- New Manager Training (1 hour)

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:

LiDestri Foods, Inc.

Agreement Number: ET19-0102

Panel Meeting of: June 22, 2018

ETP Regional Office: Sacramento

Analyst: J. Dongallo

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate HUA Veterans	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 207	U.S.: 1,000	Worldwide: 1,000
<u>Turnover Rate:</u>	4%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$468,910		\$0	\$0		\$468,910

In-Kind Contribution:	100% of Total ETP Funding Required	\$502,151
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Cont. Improv., HazMat, Mfg. Skills, OSHA 10/30, Literacy Skills	175	8-200	0-12	\$2,210	*\$12.53
				Weighted Avg: 85			
2	Job Creation Priority Rate HUA	Business Skills, Computer Skills, Cont. Improv., HazMat, Mfg. Skills, OSHA 10/30, Literacy Skills	30	8-200	0-12	\$2,600	*\$11.00
				Weighted Avg: 100			
3	Veterans Priority Rate HUA	Business Skills, Computer Skills, Cont. Improv., HazMat, Mfg. Skills, OSHA 10/30, Literacy Skills	2	8-200	0-12	\$2,080	*\$12.53
				Weighted Avg: 80			

*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: Fresno County: Job Number 1 and 3: \$12.53 per hour; Job Number 2: \$11.00 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 \$0.83 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 (Retrainee)		
Administrative Staff		4
CIP II G		1
Electrical Staff		16
Inventory Control Staff		5
Janitorial Sanitation Staff		4
Operation Staff		109

Production Facility Staff		19
Shipping Staff		2
Technician Staff		14
Tool Crib Attendant		1
Job Number 2 (Job Creation)		
Operation Staff		15
Production Facility Staff		15
Job Number 3 (Veterans)		
Electrical Staff		1
Operation Staff		1

INTRODUCTION

Founded in 1981, and headquartered in Fresno, Lidestri Foods, Inc. (LiDestri) (www.lidestrifoodanddrink.com) 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.

PROJECT DETAILS

This is LiDestri's second ETP Agreement, the second in the last five years. The prior Agreement focused on existing equipment training and various process improvements. This proposed training project will focus on new equipment for expanded production lines, as well as updated regulatory processes within the industry. Training in this proposal will not duplicate any training of the prior Agreement.

LiDestri continues to upgrade processes and technology to keep pace with industry and customer demands. The Company has invested \$1.75M on new automated kitchen machinery such as Human Machine Interface (HMI) Kitchen 1 & 2, and RedZone. This new and advanced machinery will require the Company to provide its workers with operational and equipment specific manufacturing skills training necessary to be efficient in its use.

In addition, the incorporation of HMI Kitchen and RedZone software will merge existing and new systems. This will enable employees to plan, schedule, and adjust business processes in one system. Training will provide employees skills to navigate the system and proficiently perform their job duties.

To standardize operating procedures, and stay current with changing industry regulations, LiDestri has created internal training programs for all occupations. Trainees will receive training in their area of expertise, such as Product Knowledge, Production Planning, Inventory Control, and Quality Control.

Retrainee - Job Creation

Lidestri anticipates continuous industry growth within the next 12 months. To compliment this expected growth, the Company has committed to hiring 30 new Production Facility and Operation Staff (Job Number 2) to support the equipment upgrades. The date-of-hire for all trainees in the

Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Veterans Program

Lidestri plans to train 2 Veterans (Job Number 3) who have served on active full-time duty in the military.

TRAINING PLAN

Training will be delivered by in-house subject matter experts and training vendors acquired during the proposal agreement. Training will be delivered via Class/Lab and Computer-Based Training (CBT) in the following:

Business Skills: Training will be offered to Administrative Staff, Technician Staff, CIP II G, Production Facility Staff, Operation Staff, Inventory Control Staff, Electrical Staff, Shipping Staff, and Tool Crib Attendant. Training will promote administrative efficiency and provide staff with the knowledge and skills to run the business effectively. Training topics include Communication Skills, Customer Service, Quality Control, Resolving Conflicts and Train-the-Trainer.

Computer Skills: Training will be offered to Administrative Staff, Technician Staff, CIP II G, Production Staff, Operation Staff, Inventory Control Staff, Electrical Staff, Shipping Staff, and Tool Crib Attendant. Training will focus on new software and upgraded systems. Training will improve overall processes and productivity. Training topics include Overall Equipment Effectiveness, RedZone, Human Machine Interface (HMI), Supervisor Control and Data Acquisition software and Programmable Controls.

Continuous Improvement: Training will be offered to Technician Staff, CIP II G, Production Staff, Operation Staff, Janitorial Sanitation Staff, Inventory Control Staff, Electrical Staff, Shipping Staff, and Tool Crib Attendant to ensure LiDestri remains competitive in its industry. These skills will enable employees to improve quality, productivity and food safety. Training topics include 5S, Kaizen, Best Practices, Strategic Planning and Value Stream.

Hazardous Materials: Training will be offered to Technician Staff, CIP II G, Production Staff, Operation Staff, Janitorial Sanitation Staff, Inventory Control Staff, Electrical Staff, Shipping Staff, and Tool Crib Attendant. Staff will receive the skills necessary to ensure a safe work environment while working with dangerous materials. Training topics include Hazardous Communication, and Hazardous Analysis and Critical Control Points.

Manufacturing Skills: Training will be offered to Technician Staff, CIP II G, Production Staff, Operation Staff, Janitorial Sanitation Staff, Inventory Control Staff, Electrical Staff, Shipping Staff, and Tool Crib Attendant to ensure LiDestri remains competitive in its industry. Trainees will gain the skills and knowledge to operate and maintain new and old production equipment to ensure product quality. Training topics include Mix Proof Valve Systems, RMS Retort Systems, Good Manufacturing Practices, Standard Operating Procedures, and Food Allergens.

Literacy Skills: Training will be provided to Operation and Production Facility Staff to ensure effective communication in supporting business processes. Training topics include Vocational Language 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. This coursework is geared towards 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. This training will be offered to Technician, Production, Electrical Staff, Inventory Control and Operation Staff to ensure a safe work environment.

Computer-Based Training

CBT will be provided to supplement class/lab which is a more convenient means of delivering basic training. Trainees in Job Numbers 1 – 3 will receive between 0 – 12 hours of CBT.

Commitment to Training

LiDestri has an annual training budget of approximately \$250,000 for their Fresno training facility. The Company utilizes subject matter experts within their Company to conduct their training. 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. ETP funds will support the Company's ongoing financial commitment to training. At the completion of the ETP-funded training, LiDestri 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

The Continuous Improvement Manager will oversee all aspects of training. Additionally, the Human Resources Manager and Human Resource Representative will have the primary responsibility of enrolling trainees and tracking training hours. These are the same individuals who successfully coordinated administration of the prior ETP agreement. Lidestri has a proven process in place to ensure all administrative duties are handled properly. All staff managers, leads and trainers are knowledgeable of their responsibilities.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0162	Fresno	08/01/2016 07/31/2018	\$231,160	\$205,025 (88%)

*ET17-0162: LiDestri completed their training delivery in the first 16 months of this Agreement and is currently in the closeout process. To date, ETP Tracking System shows the Company has uploaded 104% of the potential reimbursable training hours. The Company expects to earn 100% of the approved amount of \$231,160.

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

- Accounting Administration
- Communication Skills
- Customer Service
- Inventory Control
- Material Resource Planning (MRP)
- Merchandising
- Product Knowledge
- Production Planning
- Quality Control
- Reporting
- Resolving Conflicts
- Sales Orders
- Shipping and Receiving
- Train-the-Trainer
- Working in Teams

COMPUTER SKILLS

- Automation Interface
- Highly Instrumented Automation Systems
 - Programmable Controls (PLC)
 - Human Machine Interface (HMI)
 - Supervisor Control and Data Acquisition software (SCADA)
- Overall Equipment Effectiveness (OEE)
 - Availability
 - Performance
 - Quality
 - Compliance
- Performance
 - Stock Keeping Unit (SKU)/Item#
 - Shift
 - Run
- RedZone
- RMS Retort Systems
 - Proportional – Integral – Derivative (PID)
 - System Validation Software
 - System Efficiency Software
 - Fail Safe Technology CPU

CONTINUOUS IMPROVEMENT SKILLS

- 5S
- Best Practices
- Kaizen
- Leadership Skills
- Strategic Planning
- Value Stream

HAZARDOUS MATERIAL SKILLS

- Hazard Analysis and Critical Control Points
- Hazardous Communication (HAZCOM)

LITERACY SKILLS

- Vocational Language Skills

MANUFACTURING SKILLS

- Advanced Clean In Place (CIP) System Design
- Advanced Tank Farm Solutions
- Alarms (current and historical)
- Automation HMI Kitchen Equipment 1 & 2
- Automation RedZone Kitchen Equipment
- Batching and Blending /S88 Compliant Systems
- Equipment Operation, Maintenance & Troubleshooting
- Food Allergens
- Food Defense
- Food Safety Modernization Act
- Good Manufacturing Practices (GMP)
- HACCP
- Ingredients Receiving
- Mix Proof Valve Systems
- Optimum performance
- Overall Equipment Effectiveness (OEE)
- Override Retort Steps
- Pasteurization/Heat Treatment
- Production Principles
- Proportional – Integral – Derivative (PID)
- Quality Principles
- Retort logs and trends
- Retort Management System (RMS)
- Standard Operating Procedures (SOP)
- Tracking

OSHA 10/30 (with OSHA Certified Instructor)

- OSHA 10 (requires 10 hours completion)
- OSHA 30 (requires 30 hours completion)

CBT Hours

0-12 Trainees may receive any of the following:

MANUFACTURING SKILLS

- Allergen - 1 Hour
- Audit & Inspection - 2 hours
- Basic HACCP 101 - 1 hour
- Cap Security - 1 hour
- Food Defense - 1 hour
- Glass Breakage – 0.75 min
- GMP (Good Manufacturing Practice) – 0.5 Min
- Ingredient Handling - 1 hour
- Records Completion - 1 hour
- RedZone 101 - 0.75 min
- Sensory – 1.5 hour

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:

Mary Ann's Baking Co., Inc.

Agreement Number: ET19-0117

Panel Meeting of: June 22, 2018

ETP Regional Office: Sacramento

Analyst: D. Jordan

PROJECT PROFILE

Contract Attributes:	Retrainee Job Creation Initiative Priority Rate HUA	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 194	U.S.: 195	Worldwide: 195
<u>Turnover Rate:</u>	15%		
<u>Managers/Supervisors:</u> (% of total trainees)	11%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$400,920		\$0	\$0		\$400,920

In-Kind Contribution:	100% of Total ETP Funding Required	\$484,505
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Continuous Improvement, HazMat, Mfg. Skills, PL- Mfg. Skills	160	8-200	0	\$1,170	*\$12.60
				Weighted Avg: 45			
2	Retrainee Job Creation Initiative Priority Rate HUA	Business Skills, Computer Skills, Continuous Improvement, HazMat, Mfg. Skills, PL- Mfg. Skills	137	8-200	0	\$1,560	*\$11.00
				Weighted Avg: 60			

* It will be made a condition of contract that the trainees in this Job Number will never be paid less than the 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: \$12.60 per hour; Job Number 2: \$11.00 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 \$1.60 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 (Retrainee)		
Administrative Staff		9
Research Development Staff		4
Quality Assurance Staff		6
Manufacturing Personnel		72
Machine Operators		27
Maintenance Personnel		9
Sanitation Personnel		9
Managers/Supervisors		18
Logistics Staff		6
Job Number 2 (Job Creation)		
Administrative Staff		1

Quality Assurance Staff		2
Manufacturing Personnel		96
Machine Operators		22
Maintenance Personnel		3
Sanitation Personnel		3
Managers/Supervisors		7
Logistics Staff		3

INTRODUCTION

Founded in 1961 and headquartered in Sacramento, Mary Ann's Baking Co., Inc. (Mary Ann's) (www.maryannsbaking.com) 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 include Aldi's, Albertson's, DOT Foods, Grocery Outlet, and Kroger.

Need For Training

This is Mary Ann's third ETP Agreement, the third in the last five years. During Mary Ann's two previous agreements training focused on new equipment and software training for new staff. In this proposal, Mary Ann's will continue to provide training to improve efficiency and productivity, and maintain food safety processes. The Company will also provide training on new equipment, software, and advanced production processes. Some training topics are similar to those provided in the previous Agreement; however, trainees will not receive any duplicate training.

To stay competitive as a manufacturer of baked and fried sweet goods, Mary Ann's is continuously improving and implementing new technology and processes. These changes include new Muffin and Cake Donut line equipment. Training will be provided on processes and maintenance of these machines.

Training will continue on Just Food' Bakery Manufacturing Operating Software, initiated in the last project, and RedZone manufacturing operating software. This software will allow staff to input data, analyze results and improve operations. Training will provide employees skill to navigate the system and proficiently perform their job duties.

Mary Ann's must also maintain its British Retail Consortium (BRC) certification and will continue to train their trainees on the BRC standards. This certification will allow Mary Ann's to conduct business worldwide. Training will take place at the Company's Sacramento location.

Retrainee - Job Creation

Mary Ann's has committed to hiring 137 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.

Mary Ann's addition of new equipment, software, and additional shifts to each production line requires the hiring of additional Manufacturing Personnel, Machine Operators, Sanitation Personnel, Manager/Supervisors, Logistics Staff, Maintenance Personnel, Quality Assurance Staff and Administrative Staff. Hiring new staff will enable the Company to stay competitive and maintain their BRC certification.

PROJECT DETAILS

Training Plan

Mary Ann's will provide Class/Lab and Productive Lab training by in-house subject matter experts in the following:

Business Skills: This training will be offered to Administrative Staff. Training will develop trainees communication skills and improve their accounting knowledge. Training topics will include Advanced Accounting, Communication Skills and Business Performance.

Computer Skills: This training will be offered to all occupations. Trainees will receive training on Advanced Microsoft Office, Maintenance/Sanitation software and Just Food (ERP) Phase 2 training. Training will provide accurate documentation on production, as well as completing reports quickly and proficiently.

Continuous Improvement: This training will be offered to Managers/Supervisors, Administrative, Research Development and Quality Assurance Staff. Trainees will receive training in Root Cause Analysis, Team Building, Problem Solving and Leadership. Training will enable trainees to perform more effectively in team environments, implement new processes, improve leadership, and increase product quality.

Hazardous Materials Skills: This training will be offered to Managers/Supervisors, Maintenance Personnel Sanitation Personnel, Quality Assurance Staff, and Logistics Staff. Training will include Chemical Handling, Hazard Analysis and Critical Point Control, and Waste Management. Training will help prevent biological, chemical and physical hazards during the production process.

Manufacturing Skills: This training will be offered to all occupations. Training will focus on new equipment including new Muffin and Cake Donut lines. Trainees must know how to repair and troubleshoot all equipment. Training will also take place on BRC Standards which is required as part of the Global Food Safety Initiative.

Productive Laboratory (PL)

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

Training will be delivered to Machine Operators, Maintenance, Sanitation, Manufacturing and Logistics Staff. When paired with classroom training, PL is the best training technique for trainees. Trainees will work with a trainer who will explain and demonstrate step-by-step instructions and then observe while trainees perform these same tasks. Training will consist of new equipment that includes new Muffin and Cake Donut line machines. Trainees will also receive troubleshooting, repair and sanitation procedures training. Production will be affected because an experienced technician will be used to train and observe trainees. Mary Ann's will provide up to 60 hours for PL-Manufacturing Skills training at a 1:1 trainer-to-trainee ratio.

Commitment to Training

Mary Ann's allocates approximately \$500,000 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**

Mary Ann's has a detailed training plan in place and is ready to begin training upon approval. The Company's HR Manager and the CFO have the primary responsibility of enrolling trainees and tracking training hours. These individuals successfully oversaw the administration of prior ETP agreements. Training will be delivered by in-house experts, and vendors to be determined later.

Temporary to Permanent Hiring

Mary Ann's intends to train 35 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 3 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. Mary Ann's uses Aerotek, Golden State Staffing Services, Inc., Imko Workforce Solutions, and Volt Workforce Solutions temporary agencies.

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 Mary Ann's 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.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0433	Sacramento	05/04/15 – 05/03/17	\$424,616	\$375,161 (88%)
ET13-0173	Sacramento	10/01/12 – 09/30/14	\$367,360	\$324,873 (88%)

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

- Advanced Accounting
- Business Performance (Documentation)
- Communication Skills

COMPUTER SKILLS

- Advanced Microsoft Office
- Just Food (ERP) Phase 2 Training
- Maintenance/Sanitation Software Programming (MP-2)
- Programmable Logic Controls (PLC) Programming
- Red Zone Manufacturing Software

CONTINUOUS IMPROVEMENT

- Coaching
- Decision Making
- Improving Workflow
- Leadership
- Problem Solving
- Project Management
- Root Cause Analysis
- Statistical Analysis
- Team Building

HAZARDOUS MATERIALS

- Chemical Handling
- HACCP Training
- Waste Management (New Waste Byproducts)

MANUFACTURING SKILLS

- British Retail Consortium Certification Standards Training/Maintenance
- Danish Line Equipment
- Equipment Preventative Maintenance
- Equipment Troubleshooting/Repair
- Forklift Training
- Labeling Requirements
- New Cake Donut Line Equipment
- New Muffin Line Equipment

PL Hours

0-60

MANUFACTURING SKILLS (PL) (limited ratio 1:1)

- British Retail Consortium Certification Standards Training/Maintenance
- Danish Line Equipment
- Equipment Preventative Maintenance
- Forklift Training
- Maintenance Troubleshooting/Repair
- New Cake Donut Line Equipment
- New Muffin Line Equipment
- Standard Equipment Operations
- Standard Sanitation Procedures

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



Training Proposal for:

Apprentice & Journeymen Training Trust Fund of the Southern California Plumbing and Piping Industry

Agreement Number: ET19-0901

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Apprenticeship Retrainee Priority Rate Veterans	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Imperial, Inyo, Kern, Los Angeles, Orange, San Bernardino, San Diego, San Luis Obispo, Santa Barbara, Riverside, Ventura	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Southern California Pipe Trades District Council 16		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$887,968		\$61,460 8%		\$949,428

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

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Apprentice Priority Rate	Commercial Skills, OSHA 10/30	222	8-210	0	\$3,234	\$22.77
				Weighted Avg: 144			
2	Retrainee Apprentice Veterans Priority Rate	Commercial Skills, OSHA 10/30	40	8-210	0	\$3,234	\$22.77
				Weighted Avg: 144			
3	Retrainee Journeymen Priority Rate	Commercial Skills, Computer Skills, Cont. Imp., OSHA 10/30	460	8-200	0	\$222	\$22.77
				Weighted Avg: 8			

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

Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Apprentice Plumber and Pipefitter		222
Job Number 2-Veterans		
Apprentice Plumber and Pipefitter		40
Job Number 3		
Journeymen Plumber and Pipefitter		460

*The wage range for Journeymen is due to cost-of-living adjustment by geographic region and varying union locals.

INTRODUCTION

Founded in 1959, the Apprentice & Journeymen Training Trust Fund of the Southern California Plumbing & Piping Industry (P&P Trust) (www.ajtraining.org) 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.

Union representation is through District Council 16 of the United Association of Journeymen and Apprentices of the Plumbing and Pipefitting Industry of the United States and Canada, which represents 10 local unions in Southern California. District Council 16 has multiple Joint Apprenticeship Training Committees (JATC) acting as program sponsors. The union sponsors several DAS approved programs for occupations in the following industries; service and repair, sewer and storm drain, and landscape irrigation piping.

Training will be provided for the following joint apprenticeship committees:

- Glendale, Burbank, San Fernando Valley & Antelope Valley Plumber & Steamfitter JATC
- Pomona and San Gabriel Valley Plumber & Steamfitter JAC
- Kern, Inyo, & Mono Counties Plumbing, Pipefitter & Refrigeration/Air Conditioning Mechanic JATC
- Orange County Plumber & Steamfitters JATC
- Landscape/Irrigation, Sewer & Storm, Underground Specialty Piping JATC
- Los Angeles & Vicinity Steamfitters & Industrial Pipefitters JATC
- San Bernardino & Riverside Counties Plumbing & Steamfitter JAC
- Santa Barbara County Pipe Trades JAC
- San Luis Obispo County Plumbing JAC
- San Diego & Imperial Counties Pipe Trades JAC
- Ventura County Plumbing & Pipefitting JAC

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.

RSI is traditionally delivered as class/lab. The curriculum is developed with input from DAS and a designated Local Educational Agency (in this case Los Angeles Unified School District). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice. (Journeymen are capped at 200 hours.)

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. 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.

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

Training under this proposal is similar to those in the previous ETP Agreements. However, P & P Trust has continued to expand its training programs, adding new curriculum topics that will meet employer needs. Specialized training offered through P & P Trust's training programs will lead to certifications in valve repair, welding, refrigerated handling, industrial rigging, foreman skills and green awareness. Worker certifications will ensure employers have the specific skills they need to complete complex construction jobs. As the piping and plumbing industry continues to evolve, training courses will include advancements in technology and other methods being utilized by workers in order to meet production demands.

P & P Trust provides training for Apprentices and Journeymen in plumbing and piping service and repair work. Training includes installation, gas fitting, assembly, air and water balance, appliance service and repair, electronic control work, pipe fabrication, quality control, and in plant operation of mechanical systems. Trainees will also learn techniques and methods in planning, designing, and installation of low and high pressure steam systems dependent upon the type of environment (geothermal plants, manufacturing plants, oil refineries, etc.).

Apprentice training will introduce workers to the basics in the industry. Trainees will receive various training per semester to ensure they have basic and necessary skills required to begin careers in the plumbing and piping industry. Apprentices will learn to lay out, fabricate, assemble, install, maintain, and repair piping systems that transport fluids, slurries, and gases in the commercial, hospital and industrial sectors. In addition, Employers continue to demand training in green building systems to increase worker's ability to acquire construction jobs that focus on energy efficiency. As a result, Commercial Skills training included will include topics such as environmental design, energy efficiency and water conservation.

Training Plan

Commercial Skills: Training will be offered to all occupations to increase worker skill sets in the piping and plumbing industry.

Computer Skills: Training will be offered to Journeymen to ensure trainees can use computer software programs used by Employers. Course titles will include project management software and Computer-Aided Design.

Continuous Improvement: Training will be offered to Journeymen to improve communication and problem solving skills. Staff will learn new techniques in project management and strategic planning.

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.

LMS

Staff has reviewed and approved P&P Trust's use of a Learning Management System for recordkeeping.

Commitment to Training

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen.

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**

P & P Trust has retained Steve Duscha Advisories and the Los Angeles Unified School District for administration services. Five Trust staff members will schedule all training sessions, and complete and collect training rosters. Third party administrators will assist uploading training and enrollment data to ETP, document training hours, and provide assistance as an employer liaison.

Training Coordinator/Qualifications

Employees of P & P Trust will provide all training. Trainers are experienced journey level workers who are experts in the piping and plumbing field. Training is center-based, provided at P & P Trust locations.

Marketing and Support Costs

Employers are notified of P & P Trust through association websites, mailings, and presentations conducted throughout Southern California. Curriculum for this project has been developed by the piping industry that includes input from national and local unions, as well as businesses in the piping and plumbing industry. The committee has continued to update curriculum, training materials, and facilities to deliver training that is based on the expertise of memberships.

Although a majority of the participating employers have been recruited, additional recruitment will take place to complete this project and include employers whose training needs have changes or increased. As a result, P & P Trust requests 8% support costs to assist in continuing recruitment efforts throughout the duration of the Agreement. Administration staff will perform duties that include Apprentice employer outreach, Apprentice recruitment, and assessment of employer-specific job requirements.

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 P & P Trust under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET18-0901	\$949,221	07/01/17-06/30/19	1,247	1,247	TBD

Based on ETP Systems, 101,188 reimbursable hours have been tracked for potential earnings of \$949,221 (100% of approved amount). All training provided under this Agreement has been completed, and a total of \$904,208 is currently being reviewed by ETP Fiscal. All remaining final payments are on track for closeout by July 2018.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0900	Van Nuys	07/01/16-06/30/18	\$949,221	\$949,221 (100%)
ET15-0919	Van Nuys	03/02/15-03/01/17	\$649,905	\$649,905 (100%)
ET14-0909	Van Nuys	12/14/13-12/13/15	\$1,200,549	1,200,549 (100%)
ET13-0901	Compton	09/04/12-09/03/14	\$698,826	\$698,826 (100%)
ET11-0234	Compton	05/02/11-05/01/13	\$398,680	\$390,429 (98%)

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories and the Los Angeles Unified School District in Los Angeles will perform administrative services for a 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:

Journeyman Training**COMMERCIAL SKILLS**

- Advanced Instrumentation
- Asbestos Awareness
- Backflow Prevention
- Basic Instrumentation/EPRI Level I
- Clean Room/Orbital Welding
- Competent Person
- Confined Spaces
- Crane Signal Person
- Design and Installation of New Equipment for Energy Efficiency
- Energy Efficiency in Existing Equipment
- EPRI Level II
- Fitter NITC
- GPro: Building Green, Green Plumbing, Green Mechanical Systems
- HDPE
- Industrial Pipefitter Refinery Training
- Instrumentation Classes
- L.A. Structural Steel
- LEED Standards
- LEED Documentation and Rating system
- Medical Gas
- Mine Safety & Health Administration
- Pipeline Safety
- Plumber NITC
- Renewable and Sustainable Fuel Sources
- Rigging Techniques
- Refinery Safety: Working in High Hazard Facilities
- Safety Classes
- Service & Repair - Tankless Water Heater Installation & Troubleshooting
- Service & Repair - Water Heater Repair
- Trimble & Sokia Robotic Total Station Training
- Tube Bending
- UA Foreman
- UA Industrial Rigging
- UA Industrial Rigging Classes
- Valves
- Water Conservation

COMPUTER SKILLS

- Computer Literacy for Plumbers and Pipefitters
- Working with Files
- Basic Computers
- CAD
- Using Project Management Software

CONTINUOUS IMPROVEMENT

- Project Management
- Communications Skills
- Strategic Planning
- Problem Solving
- Quality Concepts

OSHA (Certified OSHA Instructor)

- Cal OSHA 10
- Cal OSHA 30

Class/Lab Hours

8-210

Apprentice Training**COMMERCIAL SKILLS**

- Introduction to OSHA
- Hazard Communication
- Personal Protective Equipment
- Material Handling
- Electrical Safety
- Tool Safety
- Scaffold Safety
- Fall Protection
- Stairways and Ladders
- Confined Spaces
- Mathematics used in the Piping Trades
- Units of Measurement
 - Rigging in the Piping Trades
- Materials, Hardware and Tools Associated with Rigging
- Incorporate Units of Measuring and Mathematical Formulas with Rigging
- Use of Copper and Acetylene Torches
- Gas Distribution Systems and Their Components
- UPC and Other Administrative Authorities
- Fittings, Pipes, Appliances and Materials
- Drainage Systems and Their Components
- Water Treatment
- Water Treatment & Water Sizing
- Water Mains & Water Sizing
- Water Mains & Services
- Building Water Systems

- Hot Water Supply & Water Sizing
- Introduction to Basic Drawing Tools, Measuring Tools and Lettering Skills
- Three View, Plan View and Elevation View Drawings
- Graphic Symbols for Pipe Fittings and Valves
- Interpretation of Technical Diagrams and Piping Drawings
- Interpretation of Isometric Drawings
- Service & Repair/Fixtures & Controls
- Basic Electricity, Pneumatics, Hydraulics and Servicing of Gas and Electrical Appliances
- Failure Analysis
- Advanced Drawing
- Isometric Drawings
- Drawing Structural Backgrounds
- Drawing Sleeves on Structural Backgrounds
- Drawing Sleeves without Dimensions
- Review other Trades Drawings
- Design & Layout
- Isometric Drawing of Water, Water Gas, Waste and Vent Systems
- Plan View Drawing of Water, Gas Waste and Vent Systems
- Material Take-Off List for Installation
- Laying Out Trenches, Figure Grade and Backfill
- Ordering Material for the Job Site and Maintain an Inventory
- Using the Uniform Plumbing Code as a Guide to Maintaining Standardization and Safety while Installing Plumbing Systems to Meet Minimum Requirements, with Consumer Cost in Mind
- Fundamentals of Welding
- How to Strike and Maintain an Arc with S.M.A.W. Process
- Flat, Vertical and Overhead Positions with 610 and 7018 Welding Rod on Plate
- General Knowledge of Oxy Fuel and ARC Welding Safety
- Flame Cut and Bevel Pipe
- Proper Use of Grinders for Welding Preparation
- Welding Techniques for Plate and Pipe
- Weld Rod Designations, AMP Settings and Polarity
- Creating Models and Estimating
- Qualities and Role of a Leader
- Using Computer-Based Technologies to Manipulate, Create, Store and Retrieve Information to Express Ideas and Communicate with Others
- Medical Gas Installer & Brazing
- Refinery Safety: Working in High Hazard Facilities

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

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



Training Proposal for:

Bricklayers & Allied Craftworkers Local #4 California Joint Apprenticeship Committee

Agreement Number: ET19-0902

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, San Diego, Imperial, Riverside, San Bernardino, Inyo, Mono, Tulare, Kern, Ventura, San Luis Obispo, Santa Barbara	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Bricklayers and Allied Craftworkers Local #4		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$215,760		\$14,965 8%		\$230,725

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

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Journeyman Priority Rate	Commer'l Skills, OSHA 10/30	55	8-200	0	\$667	\$22.77
				Weighted Avg: 24			
2	Retrainee Apprentice Priority Rate	Commercial Skills	60	8-200	0	\$3,234	\$22.77
				Weighted Avg: 144			

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Journeymen Brickmason	*	55
Job Number 2		
Apprentice Brickmason		60

*The wage range for Journeymen is due to cost-of-living adjustment by geographic region and varying union locals.

INTRODUCTION

Bricklayers and Allied Craftworkers Local #4 California Joint Apprenticeship Committee (www.bac4ca.org), located in the City of Arcadia, sponsors a training program for Southern California Brickmasons through its JAC (Brickmasons JAC or 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.

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.

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.

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

Employers in the masonry trade continue to face an on-going challenge to increase worker skills in order to meet higher standards. In addition, the trade must also make efforts to provide quality work at reduced costs. Apprentice and Journeymen are expected to deliver precision work that meet high standards in order for the employer to acquire contract work (bidding). Bricklayers JAC has developed a training plan to increase brick mason skills and provide hands on experience for those who are new to the trade.

Training provided will introduce Apprentices to the basics of the Brickmason trade. Curriculum topics include safe working conditions and procedures, the use of concrete in masonry construction, materials, brick laying, and skills required to build walls and special structures. Trainees will receive certifications as they complete masonry thresholds in the training program. Following completion, workers are provided continued education throughout their career to learn new techniques and skills in the masonry industry.

Training Plan

Commercial Skills: Training will be offered to all occupations to develop high skill levels in the masonry industry. Training topics will include content on residential masonry, brick paving techniques, glass blocks, and construction of roof anchors, hearths and pilasters.

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

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The Apprenticeship Director will oversee administration and training provided under this training proposal. The JAC has hired the Los Angeles Unified School District (LAUSD) and Steve Duscha Adversaries for project administration. Duties performed will include assistance with enrollment, data entry/uploading, employer liaison, and all other related administration activities. In addition, three Bricklayer JAC employees will work part-time on this project to ensure all ETP requirements are met.

Curriculum Development

Curriculum is developed by the Brickmason industry alongside LAUSD. Training topics have also included activities from the International Masonry Training and Education Foundation, a national union-management educational group. Class assessments are provided to trainees following training to report their overall experience and validation of program curriculum and instructors. Bricklayers JAC are able to revise their training program from this feedback in order to ensure their class offerings meet industry and employer needs.

Marketing and Support Costs

Participating Employers are notified of training provided by the JAC via websites, mailings, and presentations. Employers participate as members of the joint committee that operates the trust. Although a majority of participating employers to participate in training have been recruited, marketing efforts will remain on-going for the JAC to promote the Brickmason training program, and recruit additional Employers. As a result, the Brickmason JAC is requesting 8% in support costs to continue marketing/recruitment efforts.

Learning Management System

Staff has reviewed and approved Brickmasons JAC's Learning Management System for recordkeeping.

Trainer Qualifications/Infrastructure

Trainers are qualified Journeyment with extensive practical and training experience who are employed by the Trust. Training will be provided at the JAC's Arcadia facility and includes class/lab training methods to ensure trainees receive hands-on experience in brick laying, tiling, and other construction skills. This project will be overseen by the Apprenticeship Director. Brickmason JAC staff will coordinate the scheduling of training sessions, and documentation of training being delivered to Apprentice and Journeymen. The JAC has also retained LAUSD and Steve Duscha Advisories to provide administrative services. Duties provided will include data entry/upload, employer liaison and other assistance as needed.

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 Bricklayers JAC under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0930	\$151,140	03/01/17-02/28/19	90	90	TBD

Based on ETP Systems, 10,861 reimbursable hours have been tracked for potential earnings of \$151,140 (100% of approved amount). Trainees will be submitted for progress and final payments by June/July 2018.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0919	Arcadia	02/01/16-01/31/18	\$98,098	\$98,098 (100%)

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of \$5,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories and the Los Angeles Unified School District (Division of Adult and Career Education) will 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:

Apprentice Training**COMMERCIAL SKILLS**

- Complete a masonry wall
- Complete hands-on projects in custom residential work
- Learn advanced blueprint reading
- Learn brick-paving techniques
- Learn bricklaying terminology
- Learn how to construct a firebox
- Learn how to construct a fireplace flue
- Learn how to construct fireplace and footings
- Learn how to construct hearths
- Learn how to construct roof anchors
- Learn the building codes pertaining to reinforced grouted masonry
- Learn the code requirements for construction of a fireplace
- Learn the communications skills required of a job supervisor
- Learn the construction of fireplaces, kilns and furnaces by using refractory or fire brick
- Learn the construction of jambs
- Learn the construction of pilasters
- Learn the duties of a foreman and his/her career advancement possibilities
- Learn the planning and construction of custom masonry
- Learn the responsibilities of a job supervisor
- Learn the techniques for setting and laying bricks
- Learn the use of concrete in masonry units
- Learn the uses of components and shell bricks
- Learn to apply the elements of parging in masonry construction
- Learn to construct a fireplace throat
- Learn to interpret and use blueprints
- Learn to interpret trade math
- Learn to solve problems in masonry mathematics
- Learn to use stick-on veneer
- Learn to work with glass blocks
- Learn to work with glazed tiles
- Learn to work with stones
- Recognize journeyman duties
- Recognize safety, health and employment rules and procedures
- Recognize scaffolding safety practices
- Recognize shop safety rules and procedures
- Recognize shop safety rules for operating tools and equipment

- Recognize steps related to layout
- Recognize the different types of arches
- Recognize the different types of arches in a hands-on project
- Recognize the different types of job layouts
- Recognize the materials used in residential masonry design
- Recognize the materials used in veneer construction
- Recognize the patterns used in bonded masonry
- Recognize the terms used with reinforced grouted masonry
- Recognize the use of constructing trigs for building a straight wall
- Recognize the various types of veneer applied to a fireplace
- Recognize various cement blocks and bricks

Journeyman Training

COMMERCIAL SKILLS

- Advanced materials
- Safe working procedures and practices
- Scaffold safety

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



Training Proposal for:
Laborers Training and Retraining Trust Fund for Southern California

Agreement Number: ET19-0903

Panel Meeting of: June 22, 2018

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Veterans	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Kern, Los Angeles, Orange, San Bernardino, San Diego, Riverside, Ventura	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No SoCal District Council of Laborers and affiliated Laborers International Union; Local 89; Local 220; Local 300; Local 1309; Local 585; Local 652; Local 783; Local 1184		
Turnover Rate:		≤20%	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$877,776		\$60,890 8%		\$938,666

In-Kind Contribution:	50% of Total ETP Funding Required	\$Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Journeyman	Business Skills, Commercial Skills, OSHA 10/30	200	8-200	0	\$667	\$22.77
				Weighted Avg: 24			
2	Retrainee Apprentice (Construction Craft Laborer)	Commercial Skills, OSHA 10	430	8-210	0	\$1,617	\$22.77
				Weighted Avg: 72			
3	Retrainee Apprentice (Landscape & Irrigation Fitter)	Commercial Skills, OSHA 10	38	8-210	0	\$1,617	\$22.77
				Weighted Avg: 72			
4	Retrainee Apprentice Veterans (Construction Craft Laborer & Irrigation Fitter)	Commercial Skills, OSHA 10	30	8-210	0	\$1,617	\$22.77
				Weighted Avg: 72			

Minimum Wage by County: Job Numbers 1-4 (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 health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Journeyman Construction Craft Laborer		160
Jorneysmen Landscape & Irrigation Fitter		40
Job Number 2		
Apprentice Construction Craft Laborer		430
Job Number 3		
Apprentice Landscape & Irrigation Fitter		40
Job Number 4 (Veterans)		
Apprentice Construction Craft Laborer & Apprentice Landscape & Irrigation Fitter		30

INTRODUCTION

Founded in 1970, The Laborers Training and Retraining Trust for Southern California (SoCal Laborers) ([www.Laborerstraining school.com](http://www.Laborerstraining.school.com)) 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. SoCal 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.

SoCal Laborers has developed and customized curriculum with input from labor and management representatives that will address the local needs of its members, participating employers, and include various changes in the industry. The unions were directly involved in the development of this curriculum and are in full support of the training for its members.

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 training program for the Construction Craft Laborer program is 18 months, and the Landscape & Irrigation Fitter program is five years. Apprentices are required to attend a week of training each semester for three years to certify as a Journeyman Laborer.

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

RSI is traditionally delivered as class/lab. The curriculum is developed with input from DAS and a designated Local Educational Agency (in this case Hacienda La Puente Unified School District for both programs). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice. (Journeyman are capped at 200 hours.)

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. 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.

The ETP wage for Apprentices is no less than \$22.77 per hour. Actual wages paid are shown in the Training Plan Table for both Apprentices and Journeymen.

PROJECT DETAILS

Employers have continued to place heavy emphasis on the need to improve worker skills to provide quality work on increasing construction projects that are more complex and meet new green standards. Although Employers offer on-the-job training, it is the responsibility of SoCal Laborers to provide a training program that will prepare Southern California Laborers with the skills and techniques needed to complete construction needs. In an effort to control rising costs,

Employers are learning how to use new materials in the construction process and improving systems to reduce waste (time and materials).

A majority of training provided by SoCal Laborers takes place at the central training center in Azusa. Training sessions are scheduled for Apprentice and Journey-level workers during the evenings and weekends. The Laborers Apprenticeship program is provided for individuals with little or no experience in the labor construction trade and will begin careers as a Construction Craft Laborer. Trainees will learn skills that include proper use of pneumatic and various construction tools, welding, how to organize and carry heavy materials, and read construction plans/blueprints. Laborers will also learn to perform many safety-related duties such as proper scaffolding, flagging, and traffic control.

The demand for Laborers with high cutting, welding, and pipe layout techniques continues to grow. As a result, SoCal Laborers will provide training courses to expand trainee skills to a higher level. For example, a trainee who has completed the Mechanical Pipe II course (hoist and rig pipes) will now participate in the next course, Mechanical Pipe IV, which teaches the proper techniques to place pipes onto panels to build a reverse osmosis water treatment system. Additional training will continue to be delivered to ensure Laborers are working in a safe and efficient manner.

Training Plan

Training will prepare trainees to pour concrete, lay asphalt, install storm and water drains, safely work on bridges and driving tunnels, and analyze a project site plan for water filtration and erosion control. Apprentices attend 36 classroom hours during each term for a total of 72 training hours per year. Journeymen class hours are dependent on the individual's decision to upgrade skills by attending training courses that will introduce them to new techniques, materials, and methods being used in the Construction Laborers Industry.

Journey Level Laborers

Business Skills: Training will be offered to Journeymen to increase knowledge and give Laborers the tools to plan, organize, and manage construction projects. Training will also include team building and leadership skills in order to lead teams effectively.

Commercial Skills: Training will be offered to all occupations to learn skills sets in the Laborer Construction Industry. Trainees will participate in lecture-based and hands-on training in pipe layout techniques, installation, tools, drilling, tunneling, and weatherization.

OSHA 10/30: Training will be offered to Apprentice and Journeymen to complete either the 10 hour for entry level workers (Apprentice) or 30-hour course requirement (Journeymen) to ensure union members are aware of safety and health hazards often encountered in the workplace. 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.

Apprenticeship Training

Commercial Skills: Training will be offered to Apprentices to learn to build and maintain commercial, industrial, and residential construction sites. Apprentice training topics will include content on construction math, green spaces, erosion drainage, air tools, and concrete removal and replacement.

OSHA 10/30: Training will be offered to Apprentice and Journeymen to complete either the 10 hour for entry level workers (Apprentice) or 30-hour course requirement (Journeymen) to ensure union members are aware of safety and health hazards often encountered in the workplace. 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.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure/Coordinator

There are 20 staff members from the eight Locals who will provide assistance with the marketing, recruitment, needs assessments, and scheduling of training. SoCal Laborers has 27 trainers to provide training. A third party administrator, Strategy Workplace Communications alongside California Labor Federation, will provide contract administration services. Administration services will include data entry/upload, record keeping, and other duties as needed.

Veterans Apprentice

SoCal Laborers will train 30 Veterans under this Agreement (Job Number 4). 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. The training program for Veterans is the same Apprentice training as outlined above. SoCal Laborers is committed to supporting job-related training that helps Veterans transition into the California workforce. SoCal Laborers 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.

Marketing and Support Costs

The SoCal Laborers markets its training programs through newsletters, informational flyers, personal contacts, telephone calls, emails, and websites. Application announcements for the Apprentice program are provided to local, state, and federal agencies, as well as local high schools, community colleges, and community-based organizations. Feedback on the training program comes directly from the employers and union representatives, based on workplace performance, requests of customers, and needs of the industry, as well as course evaluations that are completed by students.

SoCal Laborers requests 8% support costs to fund its staff in recruitment and qualifying participating employers for this training project. While a majority of participating employers have already been recruited, additional recruitment and assessment activities with employers and the Laborers will occur to support Apprenticeship training.

Trainer Qualifications

SoCal Laborers instructors are former or current Laborers who are experts in the subject matters they teach. Classes are equipped with modern equipment and tools, with strong emphasis placed on equipment operation and safety. All trainers are certified by Hacienda La Puente Unified School District.

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 SoCal Laborers under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0921	\$706,731	12/31/16-12/30/18	1,184	1,117	TBD

Based on ETP Systems, 344,060 reimbursable hours have been tracked for potential earnings of \$706,731 (100% of approved amount). The Contractor projects submission of all progress and final payments by July/August 2018.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0916	Azusa	11/19/15-11/18/17	\$490,565	\$463,457 (94%)
ET15-0909	Azusa	09/02/14-09/01/16	\$358,704	\$358,704 (100%)
ET13-0907	Azusa	10/08/12-10/07/14	\$346,585	\$344,943 (99%)

DEVELOPMENT SERVICES

California Labor Federation in Sacramento assisted with development at no charge.

ADMINISTRATIVE SERVICES

Strategy Workplace Communications in Oakland will 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:

COMMERCIAL SKILLS

- Above Ground Drilling
- Aerial Boom Lift
- Air Tools
- Anthrax Remediation
- Arc Welding
- Blue Print Reading
- Asbestos Abatement
- Brazing and Soldering
- Brick Tending
- California Class A Prep
- Concrete: Coring and Drilling, Cutting, Placement, R & R, Sawing & Wall Sawing
- Confined Space Entry
- Drilling Operations
- Energy Auditor
- Environmental Hazards
- Fence Installation and Repair
- Fork Lift
- Geothermal Energy
- Green Construction
- Hoisting and Rigging
- Jobsite Erosion Control
- Landscape
- Lead Abatement and Awareness
- Mechanical Pipe
- Nuclear Power Plant Worker
- Oxyfuel Cutting
- Paver Installation
- Pipeline Procedures: Polyethylene Pipe Fusion
- Photovoltaic
- PV Racking Systems, Service and Maintenance
- Quality Electrical Worker
- Residential Construction Landscaping
- Sandblasting
- Silica Awareness
- Scaffold Builder
- Scaffold User
- Skid Steer
- Thermal Solar Awareness
- Traffic Control 2

- Trench Plate Protection
- Trencher
- Tunneling
- Underground Storage Tank Program
- Water Diversion
- Signal Person
- Weatherization Technician and Installer

OSHA 10/30 -- OSHA CERTIFIED INSTRUCTOR

- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)

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

Apprentice Training

Class Lab Hours

(8 - 210) Jobs 2-4

COMMERCIAL SKILLS

Laborer: General

- Air Tools
- Asphalt Remove & Replace Builders Level Math
- Fractions and Decimals, Inches to Decimals
- Brick Tending
- Concrete
- Hazardous Waste Worker
- Hand & Power Tools
- Lead Abatement Worker
- Mechanical Pipe
- Pipe Laying
- Steward Training
- Tilt-Up Construction
- Welding

Laborer: Landscape

- Environmental Hazards of Highway Work
- Environmental Passport
- Landscape 1: Planting & Maintenance
- Landscape 2: Construction Math & Irrigation Systems
- Landscape 3: Erosion Control, Grading & Drainage
- Landscape 4: Retention Walls, Dividers & Flatwork
- Mini Excavator
- Skip Loader
- Utility Trailer

All

- Aerial Boom Lift Safety
- Asbestos Abatement
- Confined Space
- Demolition and Deconstruction
- Disaster Site Worker
- Environmental Hazards
- Facility Systems and Maintenance
- Fire Watch
- Fall Protection
- First Aid/CPR
- Forklift and Forklift Safety
- Gen Con (General Construction)
- Hazard Communications
- Hazardous Waste Worker
- Hazardous Waste Worker Refresher
- Heat Illness/Stress
- Indoor Air Pollution
- ICRA Awareness (Infection Control Risk Assessment)
- ICRA for Occupied Facilities (Infection Control Risk Assessment)
- Laser/Transit/Building Level Basics
- Laser Transit and Building Level
- Lead Awareness
- MSE Wall Construction
- Permit Required Confined Space Entry
- Plasma Arc and Oxy-Acetylene Cutting
- Power Tools Certification
- Process Safety Management
- Process Piping 1-5
- Quality Rigger/Signal Person
- Respiratory Protection
- Saw Cutting
- Scaffold Builder
- Scaffold User

- Skid Steer
- Traffic Control and Flagging
- Treated Wood Waste Awareness
- Trench Plates and Shoring
- Work Area Prep
- Water Truck

OSHA 10 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10 (requires completion of 10 hours)

Note: Reimbursement for retraining is capped at 210 total training hours per trainee in Job Numbers 2-4, and 200 hours for Job Number 1, regardless of the method of delivery.



Training Proposal for:

El Camino Community College District, Center for Applied Competitive Technologies

Agreement Number: ET19-0101

Panel Meeting of: June 22, 2018

ETP Regional Office: San Diego

Analyst: M. Ibarra

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100	Industry Sector(s):	Manufacturing Aerospace and Defense Construction Warehousing Transportation/Logistics Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Teamsters Local Union No. 848		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$888,160		\$61,488 8%		\$949,648

In-Kind Contribution:	50% of Total ETP Funding Required	\$950,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials, HAZWOPER, Literacy Skills, Manufacturing Skills, OSHA 10, OSHA 30	854	8 - 200	0	\$1,112	\$16.70
				Weighted Avg: 40			

Minimum Wage by County: \$18.22 per hour for Alameda, Contra Costa, Marin, San Mateo, Santa Clara, and San Francisco 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.

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 of health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Production, Operator, Clerk, Packaging Staff, and Shipping Staff		422
Shop Lead, Machinist, Maintenance Staff, and Technician		118
Administrative Support Staff, Sales Staff, Technical Support Staff, Purchasing, Marketing, and Customer Service		64
Engineer		37
Supervisor, Foreman, Manager, and Coordinator		125
Quality Control, Inspector, and Trainer		64

Information Technology, Developer, and Programmer		18
Chemist		1
Small Business Owner		5

INTRODUCTION

Founded in 1946, El Camino Community College District, Center for Applied Competitive Technologies (El Camino CACT) (www.businessassist.org) is a two-year community college offering academic and vocational education programs. The district established El Camino CACT 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 CACT provides customized training, workshops, and technical assistance to employers.

El Camino CACT is eligible for ETP funding as a community college. The core group of participating employers consists primarily of large and small manufacturers. The proposed training will be provided to employers in the manufacturing industry or other priority industry companies facing out-of-state competition statewide; however, most of the training is expected to take place in Los Angeles and Orange Counties. The majority of training (99%) will be conducted at participating employer worksites, the remainder (1%) will be held at the Center's campus in Hawthorne. This is El Camino CACT's twenty-first ETP Project, the eighth in the last five years.

PROJECT DETAILS

Employer Demand

El Camino CACT representatives report the manufacturing and aerospace industries are continuously in the midst of high technological advancement. Success of these industries is directly related to the skill level of the workforce and businesses' ability to stay abreast with new technological developments. As a result, these industries must train and retain highly-skilled technical employees by providing continuous skills upgrades in order to keep pace with technological requirements within the industry. In addition, training will allow businesses to aggressively facilitate the transfer of knowledge to less-experienced employees to address the increasing number of Baby Boomer retirements.

El Camino CACT also reports that the manufacturing and aerospace industries constantly face fierce out-of-state competition. As these industries continue to evolve globally, companies must transform their business to conform to changing and increasing industry and customer demands. Training will allow employers to provide its workforce the skills necessary to not only support business needs but also compete and innovate in the national and global marketplace.

El Camino CACT is focused on helping manufacturing and aerospace industry employers by providing training in new technology and innovative processes that can be applied to their current workforce. Training will provide continuous skills upgrades essential to maintaining competitiveness and assist companies in achieving profitable results, maximizing employee performance, and optimizing their company productivity.

Core Group of Employers

In this proposal, all participating employers in the core group have been screened for ETP eligibility. These employers have also been determined to meet out-of-state competition standards.

El Camino CACT has requested ETP funding for 854 trainees and has current core group demand for 572 trainees (67%). The core group of employers consists of 11 employers: five small businesses (46%) and six large employers (55%) across Northern and Southern California. All 11 employers belong to priority industries.

Training Plan

Although manufacturing has been the majority of El Camino CATC's ETP contracts, the Center is receiving increasing training interest in warehousing, transportation logistics, Green/Clean technologies, and construction sectors. As these needs continue and develop, El Camino CACT will be prepared to expand training in these priority sectors.

The confirmed core group of employers mentioned above represents at least 67% of the requested funding. Some core employers may have participated in at least one of El Camino CACT's previous Agreements. In addition, several topics from the Curriculum are repeated from prior Agreements; however, El Camino CACT confirms that no trainees from previous participating employers will receive duplicative training in any subject matter.

Training will be provided in the following types of training respective to the employers' workforce needs:

Business Skills – Training topics include Building High Performance Teams, Business Grammar and Writing Skills, Communication Skills, Customer Service Excellence, Managing Change, Marketing Skills, Negotiating Strategies, Project Management, and Supervisory Skills.

Commercial Skills – Training topics include Warehousing Control and Tracking, Logistics and Shipping, Quality Control, Inventory Management, and Forklift Training.

Computer Skills – Training topics include various application skills in Microsoft Office, CAD Cam Engineering Software, Enterprise and Manufacturing Management Systems, Quickbooks and Accounting Software, Structured Query Language (SQL), and Adobe Products.

Continuous Improvement – Training topics include Analyzing and Interpreting Data, Design of Experiments, 8D Problem Solving, Frontline Leadership, Leadership for Lean Transformation, International Association for Standardization (ISO), Kaizen Methodology, Lean Manufacturing, Process Improvement, Process Management, Quality Assurance, Process Mapping, Six Sigma, Statistical Process Control (SPC), Team Building, and Transformational Leadership and Change Management.

Manufacturing Skills – Training topics include Blueprint Reading, Electrical Fundamentals, Geometric Dimension and Tolerances, Industrial Maintenance, Manufacturing & Assembly, Numerical Control Functions, Pneumatics, Production Manufacturing & Operating Skills, Programmable Logic Controllers (PLCs), and Shop Measurements.

Literacy Skills – Training topics include Vocational English as a Second Language, Basic Workplace Terminology, Written Communications, Basic Math, and Introduction to Process Terminology.

Certified Safety Training

➤ **Hazardous Materials (HAZMAT)**

This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Manufacturing Staff, Production Staff, Operators, Engineers, Managers, Supervisors, and Small Business Owners will receive up to 40 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, certification is by the certified trainers.

➤ **Hazardous Waste Operations and Emergency Response (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, though 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.

➤ **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. It may also be delivered to frontline workers if specifically required by the job order. 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.

The trainer-to-trainee ratio for HazMat, HAZWOPER, and OSHA 10/30 is 1:40.

Active Alternate Funding Contract

In addition to a current active core-funded Agreement (see Active Project Table), El Camino CACT has an active contract with ETP under the Alternative and Renewable Fuel and Technology Program (AB 118), contract term September 5, 2017 to September 4, 2019 (ET18-0800) for \$533,450. Of an estimated 470 trainees, 74 have been enrolled and 50 have received the required minimum hours of training. The ETP Class/Lab Tracking System currently shows a total of 1,512 eligible hours for potential earnings of \$39,312 (7% of the Agreement amount).

Union Support

Included in the core group of employers are trainees represented by Teamsters Local Union No. 848. ETP has received the Union's letter of support.

Marketing and Support Costs

El Camino CACT has two designated El Camino CACT staff members to market, recruit, assess training needs, and schedule training. The Center's marketing and recruitment efforts include networking, maintaining existing customer relationships, exhibiting at conferences, speaking engagements, attending trade shows, working with area Workforce Investment Boards (WIBs), telemarketing, direct mailing, visiting employers, publishing company success stories, and creating partnerships with area colleges serving their clients (i.e. Cerritos College, Antelope Valley College, Long Beach City College, and more). El Camino CACT also works with the South Bay WIB, Pacific Gateway WIB, California Manufacturing Technology Consulting (CMTTC), Chamber of Commerce, and various associations connected with the manufacturing and aerospace industries.

El Camino CACT seeks, and staff recommends 8% support costs to fund extensive marketing efforts and the recruitment of additional participating employers.

Commitment to Training

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

➤ Training Infrastructure

El Camino CACT's Director for Center for Customized Training will oversee project activities and manage overall administration of the ETP project including the tracking of potential earnings against total Agreement amount. In addition, three staff members will be responsible for trainee enrollment; scheduling and tracking training hours; submission of invoices; and marketing/recruitment efforts. As a repeat contractor, these staff members have experience with ETP's administration and recordkeeping requirements and implementing and administering ETP contracts.

Training will commence upon contract approval.

Trainer Qualifications

El Camino CACT instructors and Cerritos College trainers are qualified (industry credentialed and certified) professionals with years of industry and teaching experience. The Center also focuses on building partnerships with other community colleges and colleges that cannot afford the administration required to effectively run an ETP contract. El Camino CACT anticipates that Cerritos College will deliver approximately 10,600 hours of training for 8 to 22 trainees.

Training Agency Certification

Training agency eligibility requires certification by an independent third-party, as required for the type of school and course of study. Most schools must also be licensed by the Bureau of Private Postsecondary Education (BPPE), created in statute effective January 1, 2010.

In keeping with the Panel's standards, El Camino Community College is eligible as a training agency based on the following:

- Accredited by the Accrediting Commission for Community and Junior Colleges (ACCJC), Western Association of Schools and Colleges.

El Camino CACT is a department within El Camino Community College's Business Training Center.

Curriculum Development

El Camino CACT designs competency-based training and education programs that are performance-oriented and directly linked to an organization's strategic goals. The Center has implemented a four-step process in curriculum development:

1. Needs Assessment – Conduct an initial assessment with an employer to determine specific needs. Based on findings, a staff member works with the employer to develop a customized training program;
2. Design/Development – Develop a customized curriculum with learning outcomes identified and shared with the employer. Once reviewed with employer, a training schedule is developed;
3. Implementation – Conduct classes as scheduled. Staff works with employers to ensure that support learning and application of new skills are in place throughout the entire process; and
4. Evaluation/Measuring Impact – Upon completion of class, conduct an evaluation of the participants and employers to measure the effectiveness of training. Staff measures performance gains, productivity increases, and overall effectiveness of training. Based on findings, adjustments are made to the curriculum.

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 El Camino CACT under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0256	\$949,480	11/7/16 – 11/6/18	1,172	1,053	1,053

As of 5/29/18, the ETP Online Systems reflect 32,800 reimbursable hours have been tracked for 1,053 trainees, equating to potential earnings of \$677,364 (71% of Agreement amount). El Camino CACT

anticipates earning 100% of the Agreement amount (\$949,480) based on training currently committed to by employers and in progress through to the end of the training period (7/6/18).

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET14-0217	Statewide	11/25/13 – 11/24/15	\$1,260,304	\$1,156,291 (92%)
ET13-0125	Statewide	09/04/12 – 09/03/14	\$698,040	\$677,083 (97%)
ET12-0143	Statewide	10/03/11 – 10/02/13	\$749,037	\$715,868 (96%)
ET11-0204	Statewide	04/04/11 – 04/03/13	\$398,884	\$374,756 (94%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

El Camino CACT retained Cerritos College in Norwalk to provide credit/non-credit courses for its community and customized training courses for area manufacturers and businesses to include Literacy, Business, Computer, Continuous Improvement, and Manufacturing Skills through their Economic Development Division. Cost of services: \$275,600.

Other trainers will be identified for ETP record-keeping purposes, as they are retained. Training vendor(s) may provide any of the following based on the industry specific needs of the participating employer: Business, Commercial, Computer, Continuous Improvement, HAZMAT, HAZWOPER, OSHA 10/30, Literacy, and Manufacturing Skills.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- ✚ Building High Performance Teams
- ✚ Business Grammar and Writing Skills
- ✚ Business Fundamentals
- ✚ Coaching and Counseling for Peak Job Performance
- ✚ Communicating with Confidence
- ✚ Communication Skills
- ✚ Conflict Resolution Strategies and Management
- ✚ Cost Control
- ✚ Customer Service Excellence
- ✚ Delivering High Impact Presentations
- ✚ Essential Skills for Successful Supervision
- ✚ Finance for Non Finance People
- ✚ Managing Change
- ✚ Managing Priorities and Improving Time Management Effectiveness
- ✚ Marketing Skills
- ✚ Negotiating Strategies
- ✚ Practical Solutions for Performance Management
- ✚ Planning and Organization for Optimal Results
- ✚ Project Management
- ✚ Progressive Discipline
- ✚ Project Coordination
- ✚ Setting Successful Goals
- ✚ Supervisory Skills

COMMERCIAL SKILLS

- ✚ Warehousing Control and Tracking
- ✚ Distribution Systems
- ✚ Logistics and Shipping
- ✚ Quality Control
- ✚ Inventory Management
- ✚ Forklift Training

COMPUTER SKILLS

- ✚ Intermediate/Advanced Excel, Word, Access, PowerPoint
- ✚ Microsoft Power BI (Business Intelligence Features)
- ✚ Microsoft Power Query for Excel
- ✚ Microsoft Power Pivot for Excel
- ✚ Cybersecurity
- ✚ Microsoft Office 365
- ✚ Microsoft Project (Fundamentals of Project Management and Application)
- ✚ Microsoft SharePoint Foundation
- ✚ Computer Skills for Production & Inventory
- ✚ CAD Cam Engineering Software Training

- ✚ Computer Skills for Production & Inventory
- ✚ E-Commerce
- ✚ Enterprise and Manufacturing Management Systems
- ✚ Business Analytical Reporting & Presentation
- ✚ QuickBooks and Accounting Software
- ✚ Structured Query Language (SQL)
- ✚ Salesforce
- ✚ Adobe Products

CONTINUOUS IMPROVEMENT

- ✚ Analyzing and Interpreting Data
- ✚ Design of Experiments
- ✚ 8D (Eight Disciplines) Problem Solving
- ✚ Frontline Leadership
- ✚ Generational Diversity
- ✚ Leadership for Lean Transformation
- ✚ International Association for Standardization (ISO)
- ✚ Kaizen Methodology
- ✚ Lean Manufacturing
- ✚ Problem Solving
- ✚ Process Improvement
- ✚ Process Management
- ✚ Quality Assurance
- ✚ Root Cause Analysis
- ✚ Set Up Time Reduction
- ✚ Process Mapping
- ✚ Six Sigma
- ✚ Statistical Process Control (SPC)
- ✚ Team Building
- ✚ Transformational Leadership and Change Management
- ✚ APICS

HAZARDOUS MATERIALS

- ✚ Hazardous Waste
- ✚ Hazardous Materials
- ✚ Hazardous Chemical Cleaning
- ✚ Hazardous Waste Cleaning

HAZARDOUS WASTE OPERATIONS AND EMERGENCY RESPONSE STANDARD (HAZWOPER)

- ✚ Hazardous Waste Operations and Emergency Response
(Hawwoper) – 40, 24, & 8-hour courses

LITERACY SKILLS*

- ✚ Vocational English as a Second Language
- ✚ Basic Workplace Terminology
- ✚ Introduction of Process Terminology
- ✚ Written Communications
- ✚ Understanding Manuals and Reports
- ✚ Basic Math
- ✚ Locating Information on Charts and Graphs

MANUFACTURING SKILLS

-  Blueprint Reading
-  Electrical Fundamentals
-  Geometric Dimension and Tolerances
-  Industrial Maintenance
-  Manufacturing & Assembly
-  Numerical Control Functions
-  Pneumatics
-  Production Manufacturing & Operating Skills
-  Programmable Logic Controllers (PLC's)
-  Shop Measurements

OSHA 10 (Certified OSHA Instructor)

OSHA 30 (Certified OSHA Instructor)

*Literacy Training cannot exceed 45% of total training hours, per trainee.

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

Note: Reimbursement for retraining is capped at 200 total training hours, per trainee, regardless of the method of delivery.
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Participating Employers for Multiple Employer Contract (MEC) Retraining

Contractor's Name: El Camino Community College District, Center for Applied Competitive Technologies (CACT) CCG No.: ET19-0101

Reference No: 18-0283

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: AeroSpares Fabrication, LLC

Address: 15534 Minnesota Avenue

City, State, Zip: Paramount, CA 90273

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 16

Total # of full-time company employees in California: 16

Company: All Power Manufacturing, Inc.

Address: 13141 Moleste

City, State, Zip: Santa Fe Springs, CA 90670

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 249

Total # of full-time company employees in California: 65

Company: Baumann Engineering, Dba: Hi-Rel

Address: 212 South Cambridge Avenue

City, State, Zip: Claremont, CA 91711

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 83

Total # of full-time company employees worldwide: 83

Total # of full-time company employees in California: 83

Company: Berry Global dba Setco, LLC

Address: 4875 E. Hunter Avenue

City, State, Zip: Anaheim, CA 92807

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 90

Total # of full-time company employees worldwide: 40,000

Total # of full-time company employees in California: 415

Participating Employers for Multiple Employer Contract (MEC) Retraining

Contractor's Name: El Camino Community College District, Center for Applied Competitive Technologies (CACT) CCG No.: ET19-0101

Reference No: 18-0283

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Company: BQE Software Inc.

Address: 3825 Del Amo Blvd.

City, State, Zip: Torrance, CA 90503

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 200

Total # of full-time company employees in California: 80

Company: DeskMaker

Address: 6525 Flotilla Street

City, State, Zip: Commerce, CA 90040

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 80

Total # of full-time company employees in California: 80

Company: Edro Engineering, Inc.

Address: 20500 Carrey Road

City, State, Zip: Walnut, CA 91789

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 73

Total # of full-time company employees worldwide: 190

Total # of full-time company employees in California: 98

Company: Empower RF Systems, Inc.

Address: 316 W. Florence Avenue

City, State, Zip: Inglewood, CA 90301

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 17

Total # of full-time company employees worldwide: 72

Total # of full-time company employees in California: 67

Participating Employers for Multiple Employer Contract (MEC) Retraining

Contractor's Name: El Camino Community College District, Center for Applied Competitive Technologies (CACT) CCG No.: ET19-0101

Reference No: 18-0283

Page 3 of 6

Company: Fabrica

Address: 3201 S. Susan Street

City, State, Zip: Santa Ana, CA 92704

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 259

Total # of full-time company employees in California: 259

Company: F. Gaviña & Sons, Inc.

Address: 2700 Fruitland Ave.

City, State, Zip: Vernon, CA 90058

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 218

Total # of full-time company employees in California: 218

Company: Fleetwood-Fibre

Address: 15250 Don Julian Road

City, State, Zip: City of Industry, CA 91745

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 280

Total # of full-time company employees in California: 280

Company: Global Communication Semiconductors, LLC

Address: 23155 Kashiwa Court

City, State, Zip: Torrance, CA 90505

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 24

Total # of full-time company employees worldwide: 180

Total # of full-time company employees in California: 180

Participating Employers for Multiple Employer Contract (MEC) Retraining

Contractor's Name: El Camino Community College District, Center for Applied Competitive Technologies (CACT) CCG No.: ET19-0101

Reference No: 16-0711

Page 4 of 6

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Hyatt Die Cast & Engineering Corp

Address: 4656 Lincoln Avenue

City, State, Zip: Cypress, CA 90630

Collective Bargaining Agreement(s): Teamsters 848

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 138

Total # of full-time company employees in California: 138

Company: Impresa Aerospace

Address: 344 W. 157th Street

City, State, Zip: Torrance, CA 90246

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 70

Total # of full-time company employees worldwide: 210

Total # of full-time company employees in California: 210

Company: Integrated Aerospace

Address: 2040 E. Dyer Road

City, State, Zip: Santa Ana, CA 92705

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 177

Total # of full-time company employees in California: 177

Company: Jarrow Industries Inc.

Address: 12246 Hawkins Street

City, State, Zip: Sante Fe Springs, CA 90670

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 250

Total # of full-time company employees in California: 150

Participating Employers for Multiple Employer Contract (MEC) Retraining

Contractor's Name: El Camino Community College District, Center for Applied Competitive Technologies (CACT) CCG No.: ET19-0101

Reference No: 16-0711

Page 5 of 6

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Kirkhill

Address: 12023 Woodruff Avenue

City, State, Zip: Downey, CA 90241

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 166

Total # of full-time company employees in California: 102

Company: Magnetika Inc.

Address: 2041 West 139th Street

City, State, Zip: Gardena, CA 90249

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 93

Total # of full-time company employees worldwide: 110

Total # of full-time company employees in California: 67

Company: Marukan Vinegar (USA), Inc.

Address: 16203 Vermont Avenue

City, State, Zip: Paramount, CA 90723

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 30

Company: Pelican Products

Address: 23215 Early Avenue

City, State, Zip: Torrance, CA 90505

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 1,300

Total # of full-time company employees in California: 490

Participating Employers for Multiple Employer Contract (MEC) Retraining

Contractor's Name: El Camino Community College District, Center for Applied Competitive Technologies (CACT) CCG No.: ET19-0101

Reference No: 16-0711

Page 6 of 6

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: DbA RBC Bearings, Industrial Tectonics Bearings

Address: 18301 S. Santa Fe Ave.

City, State, Zip: Rancho Dominguez, CA 90221

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 56

Total # of full-time company employees worldwide: 150

Total # of full-time company employees in California: 150

Company: Soundcoat

Address: 16901 Armstrong Avenue

City, State, Zip: Irvine, CA 92606

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Company: Standard Homeopathic Company

Address: 1165 E. 230th Street

City, State, Zip: Carson, CA 90745

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 3

Total # of full-time company employees worldwide: 340

Total # of full-time company employees in California: 340

Company: Wesanco

Address: 14870 Desman Road

City, State, Zip: La Mirada, CA 90638

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 30

Total # of full-time company employees in California: 30



Teamsters Local Union No. 848

Chartered in 1937

ERIC TATE
SECRETARY-TREASURER

April 16, 2018

To California Employment Training Panel (ETP):

Teamsters Local No. 848 is supportive of El Camino College's ETP Regular Core Training Program, Contract ET18-0283 and Hyatt Die Cast to apply for it. We understand that the California Employment Training Panel (ETP) is a business and labor supported state agency that assist companies in upgrading the skills of their workforce enabling them to remain competitive. The training received under this program will assist Hyatt Die Cast to upgrade the skills of their workforce.

Sincerely,

Louie Diaz
Vice President
Teamsters Local No. 848

Our Members Are Our Strength . . . Our Children Are Our Future . . . Our Retirees Are Our Foundation

3888 CHERRY AVENUE LONG BEACH, CALIFORNIA 90807 PHONE (562) 595-1891 FAX (562) 595-1896

Affiliated with the International Brotherhood of Teamsters





Training Proposal for:

Professionals in Human Resources Association

Agreement Number: ET19-0105

Panel Meeting of: June 22, 2018

ETP Regional Office: San Diego

Analyst: J. Davey

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee SB <100 SET HUA	Industry Sector(s):	Aerospace and Defense Manufacturing Transportation/Logistics Technology/IT Wholesale Trade Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$888,080		\$61,536 8%		\$949,616

In-Kind Contribution:	50% of Total ETP Funding Required	\$800,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills	500	8-200	0	\$1,112	\$16.70
				Weighted Avg: 40			
2	Retrainee	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills	46	8-200	0	\$984	\$16.70
				Weighted Avg: 40			
3	Retrainee HUA	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills	58	8-200	0	\$984	*\$12.53
				Weighted Avg: 40			
4	Retrainee HUA SET	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills	70	8-200	0	\$984	*\$12.53
				Weighted Avg: 40			
5	Retrainee SB<100	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills	180	8-200	0	\$1,112	\$16.70
				Weighted Avg: 40			
6	Retrainee SB<100 SET	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmnt. Skills	20	8-200	0	\$1,112	\$30.36
				Weighted Avg: 40			

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

Minimum Wage by County Job Numbers 1, 2 & 5: \$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; and \$16.70 per hour for all other counties.

Job Numbers 3 & 4 (HUA): \$13.67 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo and Santa Clara counties; \$13.25 per hour for Los Angeles County; \$13.12 per hour for Orange County; and \$12.53 per hour for all other counties.

Job Number 6 (SET/Statewide): \$30.36 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

Participating employers may use up to \$2.50 per hour to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administration		87
Clerks/Warehouse		60
Engineers		35
Maintenance		60
Managers		58
Operator I		80
Operator II		40
Owner (Job Numbers 5 & 6)		43
Production I		85
Production II		43
Sales		45
Shipping/Receiving		43
Shop Lead		55
Supervisor		80
Technicians		60

INTRODUCTION

Established in 1944, and headquartered in Gardena, Professionals In Human Resources Association (PIHRA) (www.pihra.org) is a non-profit membership organization dedicated to providing business education, networking and advocacy with an emphasis on the human resources environment. PIHRA has 17 locations throughout California, located in Los Angeles, Orange, Riverside, San Bernardino and Ventura counties. Headquartered in Gardena, PIHRA is the largest affiliate of the Society for Human Resources Management Organization.

PIHRA serves approximately 4,100 members in California. This includes private businesses, non-profit organizations, government agencies and workforce services. [Note: Only private-sector for-profit businesses will participate in this proposal.] PIHRA works with entities in various industries including aerospace, agriculture, automotive, biotechnology, pharmaceutical, construction, warehouse, distribution, education institute, manufacturing, oil and gas refinery, restaurant and food services and technology.

PIHRA provides yearly educational seminars in human resources-related topics for existing and new members, for businesses to stay current on issues relevant to human resource professionals. In addition, PIHRA has indicated that members have expressed a need to be more competitive, enhance job skill sets, and maintain a healthy workforce. The training proposed in this Agreement will assist in accomplishing these objectives.

PROJECT DETAILS

This will be PIHRA's third ETP Agreement, and the second in the last five years. With the success of its current project (See Active Project Table), membership with the organization continues to increase. As such, PIHRA is focused on providing training opportunities to companies that do not have the resources available to provide needed training to their employees.

Companies are demanding companywide organizational training which aligns the mission, goals and values of the company utilizing training. Team building, and leadership are some of the course topics that companies have requested.

Training Plan/Employer Demand

Training outlined in this proposal will be customized, based on employer needs assessments and training objectives. PIHRA conducts interviews with employers and training experts to maintain a comprehensive curriculum that is relevant and responsive to training needs. In addition, participating employers are encouraged to complete post-training evaluations. This feedback is used by PIHRA to measure the quality of training and gauge how it meets employer demands.

PIHRA has identified a core group of employers with firm commitments to participate in training. The core group represents 100% of requested funding.

The majority of training (90%) will be conducted at participating employer worksites; the remainder will be center-based. No trainees who participated in previous ETP training will receive duplicate training in this project.

Business Skills: Training will be provided to all occupations to improve communication skills, customer relations and business problem solving.

Computer Skills: Training will be provided to all occupations to effectively use the Company's internal software applications to design, program, implement and troubleshoot new computer software programs and platforms such as social media, accounting software and Microsoft Suite.

Continuous Improvement: Training will be provided to all occupations to promote teamwork and improve workflow, troubleshooting, and problem solving. Training includes process mapping, Lean Enterprise topics and ISO Auditor compliance training.

Management Skills: Training will provide Managers/Supervisors with leadership and supervisory skills. Training will help staff become effective leaders in high performance workplaces.

Manufacturing Skills: Training will provide Shipping Staff, Operators, Production Staff, Maintenance Staff, Shop Leads, Technicians and Small Business Owners with skills pertaining to operate new equipment, blueprint reading, inventory management and aircraft assemblies.

SET/HUA

Under Special Employment Training (SET), a participating employer is not required to demonstrate out-of-state competition and trainees are not required to meet eligibility standards for retraining. This proposal has been identified for SET funding (Job Numbers 5 & 6.)

Some trainees (Job Numbers 4 & 6) work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. Companies located in Kern, Los Angeles, Riverside, San Bernardino, and Ventura Counties (Compton, Commerce City,

Inglewood, Perris City, Hesperia City, Oak View CDP) qualify for HUA status and thus, qualify for the Standard Minimum Wage instead of the Statewide Average Hourly Wage.

➤ Wage Modification

For trainees in Job Numbers 5 and 6, the Panel may also modify the ETP Standard Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. PIHRA is requesting a wage modification to the HUA Minimum Wage (\$12.53 to \$13.25) for these trainees.

Marketing and Support Costs

PIHRA has established relationships with Society for Human Resource Management and collaborative networks of businesses. PIHRA hosts conventions, meetings, mixers, and uses newsletters, websites, and email communication to promote business opportunities, procurement news, and various networking events. PIHRA has two employees dedicated to marketing, recruiting, assessment, scheduling, and training; therefore, PIHRA seeks full support cost of 8% to fund extensive marketing efforts to recruit additional participating employers and assessment activities of employers. Staff recommends an 8% support costs.

Tuition Reimbursement

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

Commitment to Training

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

Most of the participating employers lack the resources and funding to conduct formal and structured training, especially small companies. The majority provide on-the-job, one-on-one training to new employees, safety, and off-site seminar training. ETP funding will allow these companies to introduce new business practices and services in order to sustain growth and remain competitive in California. PIHRA will only provide training to participating employers in subjects that are outside of their expertise.

➤ Training Infrastructure

Training will begin July 2018. PIHRA has designated two staff members to oversee all administrative responsibilities, including recording and tracking training. PIHRA will also utilize a third-party vendor with ETP experience to aid in this endeavor (see Administrative Services below).

Training will be provided by PIHRA in-house staff, participating employers, and training vendors, Custom Corporate Communications and Western Training Group. In-house Staff are competent in the subject matter and will have completed all classes required for the proficiency in each topic of training prior to delivery of training on that topic (see Training Vendor below).

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0429	\$949,090	3/6/17 – 3/5/19	975	843	668

Based on ETP Online Systems, 45,484 reimbursable hours have been tracked for potential earnings of \$949,090 (100% of encumbered amount). To date, PIHRA has earned \$926,869 (97% of encumbered funds) for trainees retained for 90 days. PIHRA projects earning 100% of the approved amount, based on training completed through 5/16/18.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0166	Statewide	09/28/15 – 09/27/17	\$748,776	\$708,514 (95%)

DEVELOPMENT SERVICES

DLI & Associates LLC in San Juan Capistrano assisted with development at no cost.

ADMINISTRATIVE SERVICES

DLI & Associates LLC will also perform administrative services for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

Custom Corporate Communications of Redondo Beach and Western Training Group of Playa Del Rey have been retained to provide training in Continuous Improvement, Business and Manufacturing Skills.

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

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Writing Skills
- Customer Service
- Communication Skills
- Leadership Skills
- Goal Setting
- Managing Change
- Performance Management Skills
- Project Coordination
- Time Management
- Change Management Skills
- Project Management
- Sales Skills

COMPUTER SKILLS

- Microsoft Office Suite (Intermediate/Advanced)
- QuickBooks and Accounting Software
- Computer Design Software
- E-Commerce
- Enterprise and Manufacturing Management Systems

CONTINUOUS IMPROVEMENT

- Lean Enterprise
- Lean Manufacturing
- Lean Office
- Kaizen 7S
- Process Improvement
- Process Mapping
- Problem Solving
- Root Cause Analysis
- Set-Up Time Reduction
- ISO Auditor Training
- Process Management
- Quality Engineering
- Six Sigma
- Statistical Process Control
- Team Building

MANAGEMENT SKILLS (Managers/Supervisors only)

- Leadership for Managers

MANUFACTURING SKILLS

- Inventory Management
- Blueprint Reading
- Advanced Measurement Tools and Techniques
- Electrical Fundamentals
- Drive Systems Maintenance
- Programmable Logic Controllers

<p>Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.</p>
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Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Professionals In Human Resources Association CCG No.: ET19-0105

Reference No: 18-0171

Page 1 of 5

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: American Jerky

Address: 2400 E. Francis Street

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 63

Total # of full-time company employees in California: 63

Company: Axiomtex

Address: 18138 Rowland St.

City, State, Zip: City of Industry, CA 91748

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 96

Total # of full-time company employees in California: 61

Company: CAMBRO

Address: 5801 Skylab Road

City, State, Zip: Huntington Beach, CA 92647

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 600

Total # of full-time company employees worldwide: 1,060

Total # of full-time company employees in California: 816

Company: Dendreon

Address: 1700 Saturn Way

City State Zip: Seal Beach, CA 90740

Collective Bargaining Agreement(s): N/A

Estimated #of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 580

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Professionals In Human Resources Association CCG No.: ET19-0105

Reference No: 18-0171

Page 2 of 5

Company: Foxhead Inc.

Address: 16752 Armstrong Ave.

City, State, Zip: Irvine, CA 92606

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 500

Total # of full-time company employees in California: 300

Company: Gardner Trucking

Address: 9032 Merrill Ave.

City, State, Zip: Ontario, CA 91762

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 200

Total # of full-time company employees worldwide: 12,000

Total # of full-time company employees in California: 3,000

Company: Kroger

Address: 1100 West Artesia Blvd.

City, State, Zip: Compton, CA 90220

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 400

Total # of full-time company employees worldwide: 440,000

Total # of full-time company employees in California: 1,000

Company: Micro Precision Swiss/Orchid Santa Ana

Address: 3233 W. Harvard Street

City State Zip: Santa Ana, CA 92704

Collective Bargaining Agreement(s): N/A

Estimated #of employees to be retrained under this Agreement: 35

Total # of full-time company employees worldwide: 1,500

Total # of full-time company employees in California: 20

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Professionals In Human Resources Association CCG No.: ET19-0105

Reference No: 18-0171

Page 3 of 5

Company: MMI

Address: 20555 N. Sunshine Road

City, State, Zip: Sonora, CA 95370

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 49

Total # of full-time company employees in California: 49

Company: MPS Anzon/Orchid Arcadia

Address: 11911 Clark Street

City, State, Zip: Arcadia, CA 91006

Collective Bargaining Agreement(s): N/A

Estimated #of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 1,500

Total # of full-time company employees in California: 200

Company: Natrol

Address: 21411 Prairie St.

City, State, Zip: Chatsworth, CA 91311

Collective Bargaining Agreement(s): N/A

Estimated #of employees to be retrained under this Agreement: 140

Total # of full-time company employees worldwide: 265

Total # of full-time company employees in California: 250

Company: Newegg

Address: 17560 Rowland Street

City, State, Zip: City of Industry, CA 91748

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 2,000

Total # of full-time company employees in California: 617

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Professionals In Human Resources Association CCG No.: ET19-0105

Reference No: 18-0171

Page 4 of 5

Company: Par Pharmaceutical

Address: 9601 Jeronimo Rd.

City State Zip: Irvine, CA 92618

Collective Bargaining Agreement(s): N/A

Estimated #of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 3,600

Total # of full-time company employees in California: 260

Company: Pitney Bowes

Address: 250 Airport Circle, Ste. 101

City, State, Zip: Corona, CA 92880

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 15,000

Total # of full-time company employees in California: 330

Company: Pulmuone

Address: 2315 Moore Avenue

City, State, Zip: Fullerton, CA 92833

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 350

Total # of full-time company employees in California: 350

Company: Semihandmade

Address: 2300 Central Ave., #1

City, State, Zip: Duarte, CA 91010

Collective Bargaining Agreement(s): N/A

Estimated #of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 56

Total # of full-time company employees in California: 56

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Professionals In Human Resources Association CCG No.: ET19-0105

Reference No: 18-0171

Page 5 of 5

Company: Smurfit Kappa

Address: 1161 E. Walnut St.

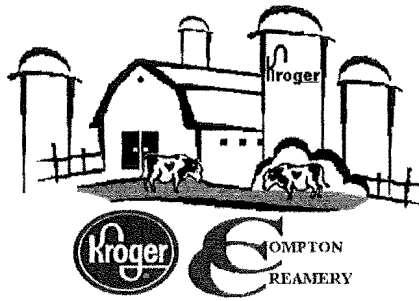
City, State, Zip: Carson, CA 90746

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 47,000

Total # of full-time company employees in California: 420



May 15, 2018

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

Dear ETP,

I am writing on behalf of Compton Creamery a division of The Kroger Company. The proposed training funded in part by the Employment Training Panel will be offered to a select group of non-union employees and will not impact our union staff. The training will include the following topics:

- Leadership and Supervisory Training
- Communication skills
- Team Building

This training will assist our company in meeting our goals. Please contact me should you have any questions or require additional information.

Sincerely,

A handwritten signature in cursive script that reads 'Sadira McFarland'.

Sadira McFarland
Human Resource Manager
Kroger Co. – Compton Creamery
1100 W. Artesia Blvd. Compton, CA 90220
310-884-6204



Training Proposal for:
City and County of San Francisco

Agreement Number: ET19-0112

Panel Meeting of: June 22, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: L. Lai

PROJECT PROFILE

Contract Attributes:	Multiple Barriers New Hire SET	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Francisco	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Plasterers' and Cement Masons' Local Union No. 300, United Brotherhood of Carpenters and Joiners of America Local Union No. 22		
Turnover Rate:		N/A	
Managers/Supervisors: (% of total trainees)		N/A	

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$540,800		\$34,560 8%		\$575,360

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

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	New Hire Multiple Barriers Priority Rate SET	Commercial Skills	80	8-260	0	\$7,192	\$16.03
				Weighted Avg: 260			

Minimum Wage by County: The New Hire minimum wage for San Francisco County is \$15.18.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Pre-Apprentice:		
Carpenter		30
Drywall Installer		2
Glazer		2
Iron Worker		3
Laborer		30
Painter		3
Roofer		4
Taper		2
Tile Finisher		2
Tile Setter		2

INTRODUCTION

The City and County of San Francisco (City of SF) is a joint powers entity governed by the City Mayor and County Board of Supervisors. The City of SF's Office of Economic and Workforce Development (OEWD) operates Workforce Innovation and Opportunity Act (WIOA) programs in San Francisco. OEWD also supports Workforce Investment San Francisco, a Workforce Investment Board (WIB). This will be the fifth Agreement between ETP and City of SF, the third in the last five years.

This proposal will fund classroom/laboratory training at CityBuild Academy (<http://oewd.org/city-build>) a program created by OEWD in partnership with construction trade unions, the City College

of San Francisco, the San Francisco Construction Trades Council, and community based organizations. It is a pre-apprenticeship program designed to assist unions and private construction contractors (participating employers) in meeting their workforce needs. The program also assists private sector employers to meet city-mandated hiring requirements for large public and private construction projects.

CityBuild Academy is not limited to one apprenticeship program and is not administered by a Joint Apprenticeship Training Committee (JATC). Rather, the academy acts as a “pre-apprentice farm team” for numerous programs administered by a variety of JATCs throughout the Bay Area. As such, this proposal will not be funded under the Apprenticeship Pilot.

Training is conducted at the Evans Campus of the City College of San Francisco utilizing instructors who are themselves members of trades unions. Community-based organizations are contracted to provide comprehensive care management to participants, while the OEWD coordinates the program and facilitates job placement.

It is anticipated that trainees will complete retention after they have been accepted into an apprenticeship program for construction work in or near in San Francisco.

Employer Demand

The City of San Francisco “First Source” ordinance (Chapter 83, City Administrative Code, eff. 1998) establishes that entities that contract with public projects valued at more than \$350,000 or require large-scale residential permits must make a good faith effort to hire from SF’s Workforce Development System. CityBuild Academy has been designated as the First Source referral entity that will assist employers in meeting this obligation.

According to City of SF, new construction is booming and demand is increasing for graduates of CityBuild Academy. City of SF construction projects in progress or starting this include the following:

- Exchange Place, 350 Bush St.
- Park Tower 250 Howard St.
- Oceanwide Center, 50 First St.
- Salesforce Tower
- Folsom Bay tower, 160 Folsom St.
- 400 Folsom
- 33 Tehama
- 500 Folsom
- 706 Mission
- 505 Brannon
- Trinity Place, 1190 Mission St.
- 150 Van Ness Ave.
- The Exchange on 16th

As a result of the continued high demand for its program graduates, the City of SF is requesting ETP funds to support the training program. All training under its Active Agreement (ET16-0112) has been completed.

Special Employment Training

The Special Employment Training (SET) funding category is used when an employer does not face out-of-state competition, or when the trainees do not have a history of Unemployment

Insurance (UI) payments. The trainees in this proposal will come from a hard-to-serve population that may have no previous reported payroll, and no history of UI. These trainees may have other “multiple barriers” to employment (e.g., limited reading/math skills, physical disability). Multiple barrier trainees are eligible for a wage modification from the SET statewide wage to the county-by-county wage, as shown in the Training Plan Table.

PROJECT DETAILS

Training Plan

The City of SF will provide up to 260 hours of Commercial Skills training in classroom and laboratory instruction per trainee. Construction trade unions, apprenticeship committees, and building contractors (employers) helped develop the CityBuild Academy curriculum to provide trainees with a broad education in the trades. Training content is based on skills that these groups recommend to ensure success in extended apprenticeship programs. Training will cover the use of hand tools, power tools, job site safety, concrete, rebar, metal studs, layout, drywall, electrical systems, and interior finishes. Program graduates will be ready to compete for apprenticeships as a carpenter, drywall installer, glazer, iron worker, laborer, painter, roofer, taper, tile finisher, and tile setter.

Impact/Outcome

Successful graduates of CityBuild Academy may become registered apprentices. Trainees also earn up to 15 college credits for their CityBuild Academy training. Trainees may become eligible for other construction-related certifications, including Forklift Safety, Skid Steer, CPR, First Aid, Scissor Lift, Confined Space, Excavation Shoring Safety, Flagging/Traffic Control, and Scaffold Safety.

New Hire Recruitment Plan

Trainees will be recruited through the following community agencies:

- A. Philip Randolph Institute
- Anders and Anders Foundation
- Charity Cultural Services Center
- Mission Hiring Hall
- Young Community Developers

Trainees must meet the following criteria: San Francisco residency; high school diploma or GED; valid CA driver's license, U.S. citizenship or proof of eligibility to work in the U.S., ability to pass drug tests; and ability to communicate effectively in English.

Marketing and Support Costs

The City of SF requests 8% in support costs to assist its staff in recruiting eligible trainees and qualifying participating employers for this program. Participating employers will be recruited from among companies that have been awarded construction contracts in San Francisco. While many participating employers have already been recruited, additional assessment activities with employers must occur to meet the specific job requests from employers sufficient to employ all successful trainees. Employers are contacted by CityBuild staff with the cooperation of City departments and building trade unions participating in this project. Employer needs for specific trainees are determined by individual job orders they place with CityBuild Academy. Using this system, all training is “to order” for specific employers. Staff recommends 8% support costs.

Funding from Other Sources

CityBuild Academy receives funds from the WIOA program and funds from the City and County of San Francisco. These funds may be used to pay for training costs that exceed the ETP reimbursement.

Tuition Reimbursement

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by City of SF under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0923	\$514,476	01/27/17 – 01/26/19	93	133	25

Based on ETP Systems, more than 100% of needed hours are tracked for a potential earning of \$514,476 or 100% of approved amount.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0112	San Francisco	08/03/15 – 08/02/17	\$514,476	\$514,476 (100%)
ET13-0355	San Francisco	06/10/2013– 06/09/2015	\$387,240	\$387,240 (100%)
ET11-0104	San Francisco	06/30/2011– 06/29/2013	\$387,240	\$387,240 (100%)

DEVELOPMENT SERVICES

City of SF retained Steve Duscha in Sacramento to assist with development of this proposal for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

City of SF also retained Steve Duscha to perform administrative services for a fee not to exceed 12.5% of payment earned.

TRAINING VENDORS

The San Francisco City College in San Francisco has been retained to provide training for an amount to be determined.

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

8 - 260

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Ceiling joists
- Communications
- Concrete
- Construction industry history
- Construction industry structure
- Construction math
- Doors
- Drywall
- Electrical
- Energy efficiency
- Finish work: tile, paint, finish carpentry
- Formwork
- Framing
- Green building processes and systems
- Hand Tools
- Hazardous materials
- Interior Finishes Rotations
- Layout
- Metal Studs
- Photovoltaic
- Power Tools
- Promoting teamwork
- Rafters
- Rebar
- Rigging
- Roofing materials
- Safety on a job site
- Scaffolding
- Windows

Note: Reimbursement for new hire training is capped at 260 total training hours per trainee.

Plasterers' and Cement Masons' Local Union No. 300

8400 Enterprise Way, Suite 111 • Oakland, California 94621

Phone: (510) 430-9492 • Fax: (510) 430-9183

May 25, 2018

Barry Broad
Chairperson
Employment Training Panel
915 I Street
Sacramento, CA 95814

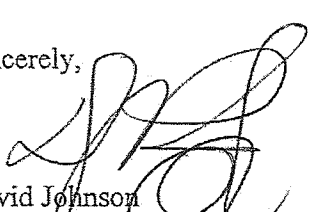
Dear Chairperson Broad:

Operative Plasterers and Cement Masons, Local 300, fully supports the San Francisco Office of Economic & Workforce Development's (OEWD) application submission to the State of California Employment Training Panel (ETP).

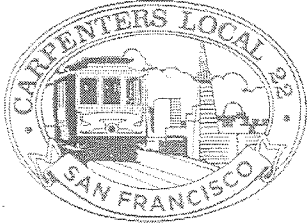
The Operative Plasterers and Cement Masons, Local 300, has been involved with OEWD's CityBuild Academy (CBA) since 2012. The CityBuild Academy is an 18 week construction pre-apprenticeship program administered by OEWD. The Cement Masons work with CityBuild trainees every week for nine weeks through the special modular training. The special modular training provides CityBuild trainees the opportunity to receive trade-specific hands-on training from experienced journey level cement masons. Upon completion of the training, trainees will be eligible for direct entry into the Cement Masons. The Operative Plasterers and Cement Masons, Local 300, shares a common goal with OEWD, which is to put San Francisco residents to work. Together we are working to prepare San Francisco's next generation of construction workers.

On behalf of Operative Plasterers and Cement Masons, Local 300, I thank you for supporting OEWD's application for ETP funds. Should you have any question, please contact me at 415-484-4411.

Sincerely,



David Johnson
Business Agent Local 300
Chairman of the JATC
DJ: tl OPEIU-29-AFL-CIO



United Brotherhood of Carpenters
and Joiners of America
LOCAL UNION NO. 22

May 17, 2018

Barry Broad
Chairperson
Employment Training Panel
915 I Street
Sacramento, CA 95814

Dear Chairperson Broad:

Carpenters Local Union 22 of the United Brotherhood of Carpenters and Joiners of America fully supports the San Francisco Office of Economic and Workforce Development (OEWD) application that was submitted to the State of California Employment and Training Panel.

Carpenters Local Union 22 has been involved with OEWD's CityBuild Academy (CBA) since its inception in 2007. The CityBuild Academy is an 18 week construction pre-apprenticeship program administered by OEWD. The Academy incorporates curriculum from the Carpenters Training Committee of Northern California. At the completion of each Academy's cycle, five graduates enter the carpenter's apprenticeship program through a direct entry agreement. Carpenters Local Union 22 shares a common goal with OEWD, which is to put San Francisco residents to work. Together we are working to prepare San Francisco's next generation of construction workers.

Carpenters Local Union 22 thanks you for supporting the OEWD's application for ETP funds. Should you have any questions, please contact me at (415) 826-4550.

Respectfully,

Patrick Mulligan
Financial Secretary

sko/opeiu-29/afl-cio





Training Proposal for:

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

Agreement Number: ET19-0904

Panel Meeting of: June 22, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: D. Woodside

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Apprenticeship Veterans	Industry Sector:	Construction Green Technology Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Mateo	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No United Association of Journeymen and Apprentices of the Plumbing and Pipe Fitting Industry of the United States and Canada (UA Local 467)		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$520,640		\$36,192 8%		\$556,832

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

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Priority Rate Journeyman	Commercial Skills, Computer Skills, OSHA10/30	16	8-200	0	\$1,112	\$22.77
				Weighted Avg: 40			
2	Retrainee Apprentice	Commercial Skills, Computer Skills, OSHA10/30	117	8-210	0	\$4,492	\$22.77
				Weighted Avg: 200			
3	Retrainee Apprentice Veteran	Commercial Skills,, Computer Skills, OSHA10/30	3	8-210	0	\$4,492	\$22.77
				Weighted Avg: 200			

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Journeyman Plumber, Pipefitter, Refrigeration and Air Conditioning Fitter		16
Apprentice Plumber, Pipefitter, Refrigeration and Air Conditioning Fitter		117
Veteran/Apprentice Plumber, Pipefitter, Refrigeration and Air Conditioning Fitter		3

INTRODUCTION

For over 100 years, the Joint Apprenticeship and Training Committee of the Plumbing and Pipe Fitting Industry of San Mateo County (Plumbers JATC San Mateo) (<http://www.ualocal467.org/training>) has provided qualified workers in the plumbing, pipefitting and HVAC (heating, ventilation and air-conditioning) trades throughout San Mateo County. This will be the third ETP Agreement for Plumbers JATC San Mateo, and the third in the last five years.

The JATC was formalized in 1955 with the establishment of the Pipe Trades Apprentice and Journeyman Training Trust Fund 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.

Employer Demand

The JATC is returning to the Panel for funding at this time because all training has been delivered under its most recent Agreement coupled with sustained employer demand for skilled workers.

The significant number of retiring workers and the recent upswing in construction means the demand for Apprentices has been accelerating in San Mateo County, with 25 apprentices completing training in 2017, and 31 expected to graduate in 2018. Graduates of the Pipe Trades training program work in construction and repair for industries that include: airport expansion and renovation, hotel and resort properties, biotech research and manufacturing facilities, food and beverage facilities, public and private education buildings, housing, water and waste treatment, and technology industries.

A sample of local construction projects generating demand for Apprentices and Journeymen include: The San Mateo Clean Water Upgrade Project - \$900 million Upgrade Project; the Mel Leong SFO Water Treatment Expansion - \$100 million Expansion Project at San Francisco Airport; the SFO Airport Hotel - \$250 million Project, 351 Room, 4 Star Hotel; the Burlingame Point - \$300 million Project, 4 Office Buildings, 5-8 Stories Tall, 700,000 Square Feet; and the Kaiser Medical Building Project - 200,000 Square Feet, 116 Exam Rooms, 143 Doctor's Offices.

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.

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 JATC reports that 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 (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. The VIP does all this at no cost to the military, the government, or participants because all costs are paid by the UA and its contractors.

PROJECT DETAILS

The JATC operates a 30,935 square-foot training center in Burlingame with 15 classrooms and laboratories equipped for specialized skills. This includes welding along with specialty subjects such as medical gas installations for biotechnology manufacturers and hospitals. Apprentice and Journeyman welders will receive medical gas certifications after successful completion of this training. There is a high demand for this certification in the San Francisco Bay Area.

Training Plan

This training will give Apprentice and Journeymen the skills they need to complete jobs quickly with the highest quality workmanship. Training will be delivered by experienced Journeyman workers in the trade. Instructors attend special courses provided by the UA Instructor Training Program to stay current with changes in the industry. The JATC's instructors also create customized teaching materials, giving trainees up-to-the-minute information on codes, materials, and processes not found in traditional textbooks.

Journeyman Training

Commercial Skills: Trainees will receive training in the use of new plumbing and piping equipment, updated building standards, emerging technologies, and green business practices. Training will meet employer demand to develop, retrofit, and maintain more efficient water flow into and out of buildings. Training will also focus on energy-efficient technologies and products such as green building materials; solar installations; new motor controls and programming; advanced orbital, TIG, and Medical Gas Welding; and advanced testing and audit equipment.

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.

Apprenticeship Training

Commercial Skills: Apprentices must learn to assemble, install, and repair pipes, fittings and fixtures for heating, water, and drainage systems, according to specifications and plumbing codes. The RSI coursework will include industry math and the ability to study building plans and drawings to determine equipment needs on each job. Coursework will supplement on-the-job training in fabrication, assembly, installation and maintenance of piping and plumbing systems, fixtures, and equipment for steam, hot water, heating, cooling, sprinkling and industrial processing systems. Apprentices learn to install heating and air conditioning systems including assembling a variety of piping for air, ammonia, gas and water systems. Trainees must also learn to test and balance air and water systems using the latest technologies.

Computer Skills: Courses include scheduling, planning and modeling software, and AutoCAD and Job Tracking software applications. Trainees learn to use these applications to modify blueprints, look up project requirements, build budgets and timelines, design virtual systems, and adjust computerized control systems.

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.

Curriculum Development

The JATC’s labor and management representatives have customized the national pipe trades curriculum to address local employer needs. The JATC also collaborated with the National Competency Testing Institute to create an industry-driven curriculum. All courses are designed to address energy efficiency and technology changes that are quickly becoming standard in the plumbing industry. Hiring demands also help shape the curriculum, such as the need for workers with the ability to weld on technically advanced construction projects. Feedback on training content and delivery comes directly from employer and union representatives based on workplace performance, requests of customers, and course evaluations completed by students.

Impact/Outcome

Certifications earned for the journey-level and apprenticeship training to be funded by ETP may include: OSHA 10, OSHA 30, HVAC Star, Medical Gas Installer, Medical Gas Brazier, Foreman’s Certification, Industrial Signal Person Certification, and various welding certifications.

Commitment to Training

Signatory employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. General safety training is, and will continue to be, provided by participating employers in accordance with all pertinent requirements under state and federal law.

Marketing and Support Costs

Plumbers JATC San Mateo 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 workers within the jurisdiction, as well as to the pipe trades contractors who employ them. Application announcements for the apprentice program will be sent to local, state, and federal agencies as well as to local high schools, community colleges, and community-based organizations.

The JATC Training Director, working with a dedicated administrative assistant, will be responsible for marketing, recruiting, needs assessments, and scheduling. The JATC is requesting 8% in support costs to fund its staff in recruiting, qualifying, and assessing participating employers for this program. Staff recommends the 8% support costs.

➤ Training Infrastructure

The Training Director and the JATC’s administrative staff person 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. The enrollee and employer data, demographics, and work hour data is then sent to Strategy Workplace which uploads the data to ETP web sites.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by the Plumbers JATC San Mateo under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0918	\$409,176	12/26/16-12/25/18	171	0	0

Based on ETP Systems, 22,403 reimbursable hours has been tracked as of April 26, 2018 sufficient to support earnings of \$316,355 (77%). All training will be completed by the June Panel meeting. The Contractor projects final earnings of 100% based on high employment rates in the local area.

PRIOR PROJECTS

The following table summarizes performance by the Plumbers JATC San Mateo under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0900	Burlingame	08/03/15 – 08/02/17	\$386,124	\$353,061 (91%)

DEVELOPMENT SERVICES

California Labor Federation in Sacramento and Strategy Workplace Communications in Alameda 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 Training**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 (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
 - Signallerperson
 - National Environmental Balancing Bureau
 - Commissioning (Certification for Heating & Cooling Systems)
 - Medical Gas - Installation, System Testing, Maintenance, Repair, Standards and Brazing
 - Foreman
 - Backflow
 - Orbital Welding
 - Tungsten Inert Gas Welding
 - Star Review

COMPUTER SKILLS

- + Computer-Aided Drafting
- + 3-D Drawings Software

OSHA 10/30 (OSHA Certified Instructor) OSHA 10 OSHA 30**Class/Lab Hours**8-210 (Job Numbers 2 & 3) **Apprentice Training****COMMERCIAL SKILLS****Plumbing and Steamfitting** 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
- 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 Years
 - 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
- ✚ 3-D Drawings Software

OSHA 10/30 (OSHA Certified Instructor)

- ✚ OSHA 10
- ✚ OSHA 30

Safety training cannot exceed 10% of total training hours for any individual trainee.
This 10% cap does not apply to Hazardous Materials or OSHA 10/30 training.

Note: Reimbursement for Job Number 1 (Journeyman) retraining is capped at 200 total training; and capped at 210 total training hours for Job Numbers 2 & 3 (Apprentice) per trainee regardless of the method of training delivery.



Training Proposal for:

Northern California Heat & Frost Insulators and Allied Workers Joint Apprenticeship and Training Committee

Agreement Number: ET19-0900

Panel Meeting of: June 22, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: D. Woodside

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Apprenticeship Veterans	Industry Sector(s):	Construction Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Association of Heat and Frost Insulators and Allied Workers Local 16		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$604,800		\$41,920 8%		\$646,720

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

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Apprentice	Commercial Skills	140	8-200	0	\$4,042	\$22.77
				Weighted Avg: 180			
2	Retrainee Apprentice Veterans	Commercial Skills	20	8-200	0	\$4,042	\$22.77
				Weighted Avg: 180			

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		
Occupation Titles	Wage Range	Estimated # of Trainees
Insulation Mechanic Apprentice		140
Veteran Insulation Mechanic Apprentice		20

INTRODUCTION

Founded in 1961, the Northern California Heat & Frost Insulators and Allied Workers Joint Apprenticeship and Training Committee (Insulators JATC) (<http://www.insulators16.org>) 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 JATCs fourth ETP Agreement, and the fourth in the last five years.

Heat and frost insulator apprentices learn to insulate mechanical structures from ambient temperatures. A typical building has insulation on hot and cold water pipes, on the heating and air conditioning system, and related mechanical equipment. Insulation materials conserve energy, reduce overall energy demand, reduce pollution, control condensation, eliminate mold, and improve workplace safety. Insulators also perform asbestos removal. Customers generally include insulation, fire stop and asbestos removal contractors.

Employer Demand

The Heat & Frost Insulators apprenticeship program faces expanding demand from the construction industry for more apprentices and for more highly skilled apprentices including the following:

- A continued increase in construction in Northern California generally, and the San Francisco Bay Area specifically, will generate significant demand for skilled apprentices in the remaining months of 2018 and into 2019. Examples include the construction and repair of: High Rise Commercial Buildings, High-tech and Bio-Tech Facilities, Oil Refineries, Chemical and Food Processing Facilities, Power Plants, Marine Work, Residential Projects, Hospitals, Schools, Wineries, and Hotels. This JATC also covers a significant geographic area: 47 counties.
- Insulator mechanics must be skilled to work on any insulation project. New materials, processes, and contractor requirements for worker skills and certifications have increased the complexity and cost of training and the industry has responded by increasing the apprenticeship program from four to five years.
- The continued phase-in of Senate Bill 54, which mandates that at least 60% of Journeymen employed at oil refineries be graduates from DAS-registered apprentice programs, also has increased the demand for more apprenticeship training.
- JATC is seeking funding for only 160 of the current number of 200 non-probationary apprentices. Training will be completed in less than year one of the two-year ETP contract. (Under its current Agreement, the JATC delivered training will potential earnings of \$315,863 in only seven months.)

Veterans Program

Insulators JATC has committed to training 20 Veteran Apprentices (Job Number 2). The JATC participates in Helmets to Hardhats; the JATC Coordinator attends outreach programs for veterans; and the JATC gives veterans accelerated admission to its apprenticeship program.

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). The Apprenticeship Training Program is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. This Apprenticeship program is five years.

For the building trades, it is not customary for a worker to be employed 90 consecutive days with a single employer. 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. This proposal funds apprenticeship training only. The ETP wage for Apprentices is no less than \$22.77 per hour.

PROJECT DETAILS

The proposed training is entirely center-based. A new cohort of Apprentice trainees is scheduled to begin in July 2018. The curriculum was developed by the insulation industry with national and local input. Union and management were consulted through joint committees at all levels.

Training Plan

Commercial Skills (100%) Training will educate trainees on production efficiencies, including the latest “green” expectations of customers. The curriculum covers such topics as insulation and its relation to heat transfer, standards for refrigeration and low temperature insulation, end caps and conicals, pumps, insulation materials and properties, and general application methods. Training will help apprentices gain the knowledge and skills necessary to become Journeyman insulators, and to be more productive and flexible from the start of their employment.

Insulation is installed using a variety of techniques including pasting, wiring, stapling, taping and spraying, depending on the type of surface to which the insulating material will be applied. A sample installation practice may involve a section of insulation that must be measured and cut to the required length, stretched open along a cut that runs the length of the section and slipped over the pipe. The insulation may then be secured by wrapping or fastening wire bands, tape, stapling, sewing or covering tarpaper, cloth or canvas over it.

In addition, Apprentices will learn to perform asbestos removal work, and to install fire stop material to seal openings and joints in fire resistant rated walls.

Electronic Recordkeeping

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

Commitment to Training

ETP funding will not displace the JATC’s financial commitment to training. Signatory employers will continue to make contributions to the training trust for every hour worked by Apprentices. General safety training is provided by participating employers in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The JATC has designated three staff to assist in ETP administration. The JATC staff will schedule training. Instructors will track trainee attendance and pass to 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. Training will be delivered by experienced Journeymen.

Impact/Outcome

Apprentices will become certified Journeymen once they complete the entire Apprentice curriculum.

Marketing and Support Costs

Marketing is done through announcements, emails, and web postings to members of Local 16 and signatory employers. The Insulators JATC is requesting 8% support costs to assist staff in

training liaison with qualifying signatory employers. Recruitment and assessment activities for Apprentices will also be supported. Staff recommends 8% support costs.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by the Insulators JATC under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0910	\$250,200	10/01/16-09/30/18	100	152	0

Based on the ETP Online Tracking system, there are 22,724 reimbursable hours as of 4/19/2018. (Over 100% of approved amount). The Contractor projects final earnings of 100% based on employment retention. Trainees are in the process of completing their retentions.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0918	Statewide	03/02/15 – 03/01/17	\$200,160	\$200,160 (100%)
ET13-0923	Statewide	09/01/13 – 08/31/15	\$121,660	\$121,660 (100%)

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories will also perform administrative services for a fee of 10% of payment earned.

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

COMMERCIAL SKILLS

- + Blueprint reading
- + Boxing a valve
- + Cold work/hot work
- + Determining and insulation system
- + Economic thickness
- + Effective supervision
- + End caps and conicals
- + General application methods
- + Geometric construction
- + Hand saw cutting
- + High temperature
- + Industry related formulas
- + Insulation and its relation to heat transfer
- + Insulation materials and properties
- + Math review
- + Metal layouts
- + Orientation
- + Pattern making
- + Pumps
- + Polyvinyl chloride application
- + Removable pads
- + Rubatex, armafex and rubber
- + Safety
- + Sheet metal develops & layouts
- + Skill upgrade
- + Standards for refrigeration and low temperature insulation
- + Stiffner ring
- + Supervision

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 Workforce Association
Agreement Number: ET19-0110

Panel Meeting of: June 22, 2018

ETP Regional Office: Sacramento

Analyst: C. Kaiser

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100 HUA SET Medical Skills Training	Industry Sector(s):	Manufacturing Services Healthcare Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$888,360		\$61,572 8%		\$949,932

In-Kind Contribution:	50% of Total ETP Funding Required	\$900,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Comm. Skills, Computer Skills, Cont. Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30, PL-Mfg Skills	230	8-200	0-100	\$1,668	\$16.70
				Weighted Avg: 60			
2	Retrainee	Business Skills, Comm. Skills, Computer Skills, Cont. Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30	50	8-200	0-100	\$1,476	\$16.70
				Weighted Avg: 60			
3	Retrainee Priority SET	Business Skills, Comm. Skills, Computer Skills, Cont. Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30	25	8-200	0-100	\$1,668	\$22.77
				Weighted Avg: 60			
4	Retrainee SET	Business Skills, Comm. Skills, Computer Skills, Cont. Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30	40	8-200	0-100	\$1,476	\$30.36
				Weighted Avg: 60			
5	Retrainee SB<100	Business Skills, Comm. Skills, Computer Skills, Cont. Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30, PL-Mfg Skills	20	8-200	0-100	\$1,668	\$16.70
				Weighted Avg: 60			
6	Retrainee SB<100 SET	Business Skills, Comm. Skills, Computer Skills, Cont .Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30	20	8-200	0-100	\$1,668	\$30.36
				Weighted Avg: 60			

7	Retrainee Priority HUA	Business Skills, Comm. Skills, Computer Skills, Cont. Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30, PL-Mfg Skills	65	8-200	0-100	\$1,668	\$12.53
				Weighted Avg: 60			
8	Retrainee HUA	Business Skills, Comm. Skills, Computer Skills, Cont. Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30	30	8-200	0-100	\$1,476	\$12.53
				Weighted Avg: 60			
9	Retrainee Priority SET HUA	Business Skills, Comm. Skills, Computer Skills, Cont. Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30	35	8-200	0-100	\$1,668	\$12.53
				Weighted Avg: 60			
10	Retrainee SET HUA	Business Skills, Comm. Skills, Computer Skills, Cont. Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30	32	8-200	0-100	\$1,476	\$12.53
				Weighted Avg: 60			
11	Retrainee SB<100 HUA	Business Skills, Comme. Skills, Computer Skills, Cont. Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30, PL-Mfg Skills	20	8-200	0-100	\$1,668	\$12.53
				Weighted Avg: 60			
12	Retrainee SB<100 SET HUA	Business Skills, Comm. Skills, Computer Skills, Cont. Improv., Mfg Skills, MS Clin/Precep, MS Didactic, OSHA 10/ 30	20	8-200	0-100	\$1,668	\$12.53
				Weighted Avg: 60			

Minimum Wage by County: Job Numbers 1, 2, & 5: \$18.22 for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara counties; \$17.54 for Los Angeles County; \$17.50 for Orange County; \$17.03 for San Diego County; \$16.80 for Sacramento County; and \$16.70 for all other counties. Job Number 3: \$22.77 for all counties; Job Numbers 4 & 6: \$30.36 for all counties; Job Numbers 7-12 (HUA): \$13.67 for Alameda, Contra Costa, Marin, San Mateo, and Santa Clara

counties; \$15.00 for San Francisco County; \$13.25 for Los Angeles County; \$13.12 for Orange County; \$12.77 for San Diego County; \$12.60 for Sacramento County; \$12.53 for all other counties.

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

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

Participating employers may use up to \$2.50 per hour to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Allied Health Worker		60
Administrative Worker		84
Manager		30
Owner		6
Production Worker		230
Professional Support Workers		137
Supervisor		40

INTRODUCTION

Established in 1998, California Workforce Association (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. The affiliate membership includes local non-profits, government, educational institutions, and community-based organizations involved in training, education, economic development, welfare and employment, and other workforce development partners.

CWA provides training and technical assistance crucial to the success of California's efforts in meeting the challenges of preparing the workforce for the future. Annually, CWA sponsors a number of workshops and conferences on workforce policy, One-Stop partnerships and service delivery, and youth employment and training. This will be CWA's fifth ETP funded project and the third in the last five years.

NEED FOR TRAINING

In this proposal, CWA will continue collaborating with local Workforce Investment Boards (WIBs). Employers in the core group are primarily manufacturing companies that seek retraining to enhance skills of employees to improve productivity and eliminate waste from work processes, and provide better service to their customers. Both team leaders and team members will be trained. In addition, CWA will provide medical skills training. Training will ensure all regulatory changes are met while improving quality processes, outcomes, and measures. Training will help employers meet a number of competitive challenges.

Multiple industries are experiencing significant growth and seek retraining to enhance employee skills. CWA's training plan ensures businesses have the skilled workforce required to meet the needs of their clients and compete with foreign and domestic competitors. ETP funded training

will allow employers to bridge the skill gap of incumbent staff and respond to unique employer challenges and growth opportunities.

PROJECT DETAILS

Employer demand is determined by input from training vendors and local WIBs that have employer relationships through their board members and business services outreach to employers in their local communities. Each employer will be individually assessed to determine specific needs.

Customized training for individual employers will be provided at the employers' facilities. CWA serves companies statewide. Trainings will be provided to trainees via Class/Lab, Computer Based Training, E-Learning, and Productive Lab.

Business Skills – Training will be provided to all occupations. Topics include Business Analysis and Goal Setting, Creative Problem Solving & Innovative Solutions, Financial Strategies, and Sales Strategies & Skills. Training is intended to provide the skills to effectively and efficiently maintain business operations.

Commercial Skills – Training will be provided to all occupations. Topics include Fundamentals of Banking, Title 24 Standards, and Rehabilitation Services.

Computer Skills – Training will be provided to all occupations. Topics include Computer Application Software, Shop Floor Computer Basics, and Enterprise Management Systems. Training is intended to improve software skills.

Continuous Improvement – Training will be provided to all occupations. Topics include Communicating Effectively, Lean Manufacturing/Thinking, Process Improvement Methodologies, and Team Problem Solving. These courses are intended to eliminate waste and improve processes.

Manufacturing Skills – Training will be provided to all occupations, except Allied Health Care Workers. Topics include Equipment Operations, Manufacturing Practices, Operation & Processes, and Warehousing Operations & Distribution. Training is intended to increase production.

Medical Skills - Training will be provided to Allied Health Workers. Didactic topics include Body Mechanics, Infection Control, and Telemedicine. Preceptor topics include Patient Assessment & Care, Physical Therapy Skills, and Respiratory Care Practitioner 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 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 (PL)

Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. The instructor must dedicate 100% of the time to training delivery during all hours of training.

Select participating manufacturing employers will utilize PL training for their Production Workers to allow hands-on training for new equipment and production processes. Since factory equipment cannot be reproduced in a classroom setting, PL training is necessary to ensure safety and production standards are being met. This training will be at a much slower pace than regular production with significantly higher defects as trainees gain proficiency. A subject matter expert will conduct training. The trainer will first demonstrate how to use the equipment, then supervise trainees using the equipment. A department supervisor will attest to the trainee's competency once training is completed. Training includes manufacturing processes, production operations, and good manufacturing processes.

Trainees may receive approximately 60 hours of PL training. CWA is requesting a 1:3 trainer-to-trainee ratio as equipment may require up to 3 employees to operate machinery at any given time.

Computer-Based Training

Trainees will receive up to 100 total training hours per trainee of CBT training.

Special Employment Training

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

Trainees in Job Numbers 3, 4, 6, 9, 10 and 12 will be funded under SET guidelines. Job Numbers 9, 10 and 12 are located in an High Unemployment Area (HUA), thus these trainees will be subject to ETP Standard Minimum Wages by county.

Retention Modifications

CWA is requesting an alternate retention of 500 hours within 272 days for Allied Health Care Workers. Healthcare workers that have non-customary work hours.

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.

CWA is requesting 30 hours per week for Allied Health Care Workers. Employees in these occupations are considered full-time at 30 hours per week and eligible for full-time benefits.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. Training varies by participating employers, is both job specific and companywide, and includes sexual harassment prevention, safety, legal compliance, product knowledge, and on-the-job training.

➤ **Training Infrastructure**

Training will be delivered primarily at the participating employers' worksites, with occasional center-based classes for employers with similar training needs. Participating employers will use qualified trainers to train their own employees.

CWA has three staff members who will oversee the administration of the ETP Contract. CWA has also retained the services of a third-party administrator who has extensive ETP experience to assist with administration.

Impact/Outcome

Training is expected to develop skilled workers to produce more with less waste and aid California manufacturers and small businesses in gaining more business, which general leads to more jobs.

Marketing and Support Costs

Marketing activities include mail, email, and website marketing. Members of the WIBs will also market directly to their associates and training vendors will conduct direct marketing. Support costs of 8% will be used to recruit additional participating employers and assess employer specific job training requirements throughout the term of the project. Staff recommends the 8% support costs.

Trainer Qualifications

Training will be delivered by vendors who are subject matter experts. In addition, some training may also be provided by experienced trainers who work for participating employers.

Training Coordinator

CWA has three employees dedicated to marketing, recruitment, needs assessment, scheduling and ETP administration. Project administration will be shared by CWA and a third party administrator.

Tuition Reimbursement

CWA represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0136	\$941,211	7/1/16 to 6/30/18	771	428	55

Based on ETP Systems, 43,869 reimbursable hours out of a potential of 43,869 have been tracked with 100% of hours completed. The Contractor projects final earnings of 100% based on training currently committed to by employers.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0304	Statewide	11/17/14-11/16/16	\$649,084	\$636,223 (98%)
ET13-0282	Statewide	2/4/13-2/3/15	\$649,295	\$594,764 (92%)

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development of this proposal at no cost.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories 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

- Accounting and Finance
- Behavior Strategies/Styles To Improve Teamwork
- Budgets
- Business Administration
- Business Analysis And Goal Setting
- Business Performance
- Business Plans
- Business Writing And Grammar
- CD-10 (Billing Codes)
- Communication Skills
- Cost Control
- Creative Problem Solving & Innovative Solutions
- Customer Service
- Difficult Situations
- Diversity In The Workplace
- Effective Meeting Skills
- Employee Selection And Coaching
- Facilitation Skills
- Financial Analysis And Management
- Financial Strategies
- HIPPA Compliance
- Implementing A Plan
- Industry Advancement Program (Claims Management)
- Internet Marketing
- Interpersonal Skills
- Inventory Control
- Marketing
- Marketing & Product Knowledge
- Negotiating
- Order Entry and Processing
- Payroll Systems
- Payroll Systems, Accounting
- Presentation Skills
- Project Management
- Relationship Building Through Sales & Service
- Sales Strategies & Skills
- Solar Technology
- Supervisor Training

COMPUTER SKILLS

- Computer Application Software
- Electronic Medical Records Application Skills
- Enterprise Management Systems

- Google Classroom Training
- Google G Suite
- Intermediate/Advanced MS Office (Word, Excel, PowerPoint)
- Nordion Medicare Endeavor
- Patient Billing & Accounts Receivable (PBAR)
- Quickbooks Advance
- Shop Floor Computer Basics
- Website Development

CONTINUOUS IMPROVEMENT

- Adapting to Change
- Benchmarking
- Business Process Re-Engineering
- Coaching & Giving/Receiving Feedback
- Communicating Effectively
- Conflict Resolution
- Continuous Process Improvement/Need for Change
- Coordination of Care
- Creating & Building Teamwork
- Dealing with Conflict/Difficult Attitudes
- Decision Making
- Discharge Planning
- Documentation Skills
- Implementing Solutions
- Implementing Statistical Process Control
- Interpreting and Analyzing Data
- ISO 9000 Overview (4-8 hours)
- Kaizen Methodology
- Kanban Principles
- Leading Others
- Leadership Skills
- Lean Manufacturing/Thinking
- Meeting for Results
- Motivating Others
- Optimal Operating Methods
- Organizing for Total Quality Management
- Organizational Roles & Personality Styles
- Organizing and Setting Goals for Workflow
- Performance Improvement through Performance Management
- Planning
- Preceptor Skills
- Problem Solving
- Process Improvement Methodologies
- Process Mapping
- Pull System
- Quality Management Systems
- Reporting
- Role of the Lead
- Root Cause Analysis
- Setting Standards

- Six Sigma
- Statistical Process Control Concepts, Theory, Application
- Supply Chain Management
- Taking Ownership
- Team Problem Solving
- Time Management & Delegation
- Total Quality Management Principles
- Using Behavior Styles
- Visual Factory
- Work Flow/Measurement

COMMERCIAL SKILLS

- Asbestos Operations and Maintenance
- Auto Repair: Engine Repair; Body Work
- Behavior Analyst Skills
- Case Management Skills
- Child Development Skills
- Civil Engineering
- Environmental Engineering
- Forklift Training
- Fundamentals of Banking
- HVAC Respirators
- HVAC Safe / Good Work Practices
- HVAC Switches and Electrical Components
- HVAC Systems and Controls
- HVAC Tools
- Rehabilitation Services
 - Aquatic Therapy
 - Automated External Defibrillator (AED)
 - Brain Injury Rehabilitation
 - Cardiac Rehabilitation
 - Cold Laser Therapy
 - Conditioning Protocol for Therapy Patients
 - Functional Capacity
 - Functional Restoration
 - Hyperbaric Oxygen
 - Occupational Therapy Skills
 - Physical Therapy Skills
 - Respiratory Assessment & Care
 - Respiratory Care Practitioner Skills
 - Speech & Language Pathology Skills
 - Stroke Rehabilitation
- Therapy Skills
- Title 24 Standards

MANUFACTURING SKILLS

- Assembly Procedures
- Blueprint Reading
- Equipment Operations
- Forklift Training

- Fundamentals of Lean Manufacturing
- Good Manufacturing Practices
- Job Instruction/Analyzing Jobs For Efficiency
- Lock Out, Tag Out
- Machine Safety/Workplace Safety
- Maintenance Procedures
- Manufacturing Practices
- Operations & Processes
- Production Operations
- Shop Math
- Standard Operating Procedures
- Toyota Sewing System (TSS)
- Warehousing Operations & Distribution

MEDICAL SKILLS TRAINING - DIDACTIC

- Arterial Blood Gas Interpretation (ABG)
- Annual Skills Updates
- Basic Life Support (BLS)
- Biofeedback
- Body Mechanics
- Equipment Skills
- Ergonomics
- Functional Restoration
- Infection Control
- Mobility Assessment
- Passy-Muir Valve Placement (PMV)
- Patient Assessment & Care
- Rehabilitative Nursing Skills
- Safe Patient Handling
- Splint Assessments & Measurements
- Telemedicine
- Ventilator & Tracheotomy Care
- Wheelchair Assessment
- Wound Care

MEDICAL SKILLS TRAINING - PRECEPTOR

- Child Development Skills - (Cognitive/Problem Solving, Language & Communication, Fine Motor Skills, Gross Motor Skills)
- Rehabilitative Services
 - Conditioning Protocol for Therapy Patients
 - Occupational Therapy Skills
 - Patient Assessment & Care
 - Physical Therapy Skills
 - Rehabilitative Nursing Skills
 - Respiratory Care Practitioner Skills
 - Speech & Language Pathology Skills

OSHA10/30 (Certified OSHA Instructor)

- OSHA 10 (Requires full 10-hour course)
- OSHA 30 (Requires full 30-hour course)

E-Learning

0-200

BUSINESS SKILLS

- Risk Financing: Insurance and Self Insurance
- Initial Loss Reports, Documentation Basics, Forms & Notices
- Intro to Medical Treatment in Workers Compensation (WC), Primary Treating Physician (PTP) and Report
- Guided Tour of Society of Interventional Radiology (SIR)
- How to Make Medical Status Calls & Issue Bill Payments
- Intro to Managed Care Record
- *The California Legal System/Understanding Laws
- *Reading and Understanding CA Law Recorded
- *Employment, AQE/COE: Review of Phase I and II
- Four Elements of a Claim: Injuries

CBT Hours

0-100

BUSINESS SKILLS

- Abuse Reporting (90 min)
- Adjuster Licensing (15 min)
- Business Etiquette (15 min)
- Business Flow (15 min)
- Calibration (25 min)
- Claim Concepts (15 min)
- Customer Satisfaction (35 min)
- Design and Development (35 min)
- *Disability 101 (25 min)
- Document and Record Control (50 min)
- Document Control Using CORE (40 min)
- Getting Started on ISO 9001 Certification (30 min)
- Getting Started with CORE (17 min)
- Getting Started with CORE: The Basics (35 min)
- HIPAA Changes (1.5 hrs.)
- HIPAA Regulation (1.5 hrs.)
- HIPAA Requirements (1.5 hrs.)
- Internal Auditing (40 min)
- Intro CORE Learning Center (5 min)
- Intro to Systems & Technology (15 min)
- Introduction to AutoForms (5 min)
- ISO 9001 Introduction (20 min)
- ISO 9001 Tour (50 min)
- JURIS Software (1 hr, 10 min)
- Leadership Responsibilities (25 min)
- *Liability 101 (15 min)
- Measurement Planning (30 min)
- Medical Reports & Confidentiality (15 min)
- Medical Specialist (15 min)

- Medical Terminology (20 min)
- Next Generation Society of Interventional Radiology (SIR) (9 min)
- One Point Payroll (.5 hrs.)
- Payment Entry (10 min)
- Performance 360 – Quality (15 min)
- Plan Summary (4 min)
- Preparing for your Registrar's Audit (40 min)
- ProAct Refresher (2 hrs.)
- Process Planning (40 min)
- Product and Service Requirements (25 min)
- Providing Products and Services (45 min)
- Purchasing (25 min)
- Quality Management Software (QMS) Planning (25 min)
- Resource Planning (25 min)
- Risk Based Thinking (25 min)
- Terminology (15 min)
- Time Management (15 min)
- *WC-Insured, Self Insured & Excess (15 min)
- *Workers Compensation 101 (25 min)

Productive Lab Hours

0-60

MANUFACTURING SKILLS (1:3 Ratio)

- Assembly Procedures
- Blueprint Reading
- Equipment Operations
- Good Manufacturing Practices
- Job Instruction/Analyzing Jobs For Efficiency
- Manufacturing Practices
- Maintenance Procedures
- Operations & Processes
- Production Operations
- Shop Math
- Warehousing Operations & Distribution
- Toyota Sewing System (TSS)

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. Topics with (*) only apply to the participating employer Sedgwick Claims Management Services, Inc.

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: California Workforce Association

CCG No.: ET19-0110

Reference No: 18-0357

Page 1 of 2

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Aranda Tooling, Inc

Address: 13950 Yorba Ave

City, State, Zip: Chino, CA 91710

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 100

Total # of full-time company employees worldwide: 173

Total # of full-time company employees in California: 173

Company: Easter Seals Superior California

Address: 3205 Hurley Way

City, State, Zip: Sacramento, CA 95864

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 80

Total # of full-time company employees worldwide: 116

Total # of full-time company employees in California: 116

Company: Kokatat, Inc.

Address: 350 Ericson Way

City, State, Zip: Arcata, CA 95521

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 50

Total # of full-time company employees worldwide: 150

Total # of full-time company employees in California: 150

Company: Monterey County Weekly

Address: 668 Williams Ave

City, State, Zip: Seaside, CA 93955

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 27

Total # of full-time company employees in California: 27

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: California Workforce Association

CCG No.: ET19-0110

Reference No: 18-0357

Page 2 of 2

Company: Niños Del Cielo

Address: 2425 E. Slauson Ave. #203

City, State, Zip: Huntington Park, CA 90255

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 96

Total # of full-time company employees in California: 96

Company: Sedgwick Claims Management Services, Inc.

Address: 701 South Parker Street, Suite 5000

City, State, Zip: Orange, CA 92868

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 125

Total # of full-time company employees worldwide: 14,000

Total # of full-time company employees in California: 1,800

Company: Sutter Buttes Olive Oil Company

Address: 2204 California Street

City, State, Zip: Sutter, CA 95982

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 25

Total # of full-time company employees worldwide: 30

Total # of full-time company employees in California: 30

Company: Wing Inflatables

Address: 1220 P Street

City, State, Zip: Arcata, CA 95521

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 130

Total # of full-time company employees in California: 101

DELEGATION ORDER

Training Proposal for:
Carollo Engineers, Inc.

Agreement Number: ET19-0146

Approval Date: June 6, 2018

ETP Regional Office: San Diego

Analyst: J. Davey

PROJECT PROFILE

Contract Attributes:	Job Creation Initiative Priority Rate Retrainee	Industry Sector(s):	Engineering Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Contra Costa, Orange, Sacramento, Riverside, San Diego, Los Angeles, Placer, San Francisco, Santa Clara	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 284	U.S.: 865	Worldwide: 866
<u>Turnover Rate:</u>	1%		
<u>Managers/Supervisors:</u> (% of total trainees)	13%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$19,720		\$0	\$0		\$19,720

In-Kind Contribution:	100% of Total ETP Funding Required	\$45,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, Management Skills	55	8-200	0-33	\$324	\$16.70
				Weighted Avg: 18			
2	Retrainee Job Creation Priority Rate	Business Skills, Commercial Skills, Computer Skills,	5	8-200	0-33	\$380	*\$13.66
				Weighted Avg: 19			

*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 for Fresno, Placer, and Riverside counties; \$16.80 for Sacramento County; \$17.03 for San Diego County; \$17.50 for Orange County; \$17.54 for Los Angeles; and \$18.22 for Contra Costa, San Francisco and Santa Clara counties.

Job Number 2 (Job Creation): \$13.66 for Fresno, Placer, and Riverside counties; \$14.00 for Sacramento County; \$14.19 for San Diego County; \$14.58 for Orange County; \$14.62 for Los Angeles County; and \$15.18 for Contra Costa, San Francisco and Santa Clara counties.

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

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

Up to \$1.22 per hour may be used to meet the Post-Retention Wage in Job Numbers 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative/Support Staff		11
Production Staff		19
Technical Staff		17
Supervisor/Manager		8
Job Number 2 – Job Creation		
Administrative/Support Staff		1
Production Staff		4

INTRODUCTION

Founded in 1922 and headquartered in Walnut Creek, Carollo Engineers, Inc. (Carollo) is an environmental engineering firm specializing in the planning, design, and construction of municipal water and wastewater facilities, with an emphasis on renewable energy alternatives. Carollo has 42 locations in 16 states. Training is planned for 12 locations throughout California.

This will be the third Agreement between ETP and Carollo, the second in the last five years. In the first project, Carollo focused training on Continuous Improvement to eliminate wasteful activities and improve efficiencies in all processes and departments.

In its second Agreement, Carollo proposed a more modest training plan to ensure a successful training project. The Company focused training on Frontline Decision Making, Problem Solving, Leadership skills, and Performance Management.

For this proposed project, Carollo has expanded its services into the private sector, acquiring new industrial clients in the food processing industry. This new industry expansion brings significant training needs, since food processing wastewater treatment is different from that of municipal wastewater.

Recent industry forecasts a continued need for wastewater infrastructure development in California of more than \$26 billion over the next 20 years. Therefore, training in new wastewater technology will impact this sector, and is vital to maintaining Carollo's presence in this market. Lastly, climate change and severe weather events have led to increased opportunities for new business in master planning services to develop flood control and other preparations for severe weather events such as occurred recently in Florida and Texas.

These factors require the Company to develop training programs to prepare workers to meet these changing needs. Training will focus on new CAD-based engineering applications such as Revit and PI&D Modeling that are becoming a standard in the engineering and construction industries. In addition, the Company will provide a range of skills training in a new decision support system, Blue Plan-it®, IT Ticketing System, Liquidfiles (file sharing), and other applications.

PROJECT DETAILS

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.

Carollo has committed to hiring 5 new employees (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

As noted above, Carollo is expanding its services to meet the changing needs in new markets and water conservation efforts. To meet these client's needs and decrease its backlog, Carollo is expanding its business capacity.

Training Plan

Training will be provided by both internal trainers and vendors. With 12 locations throughout the state: Walnut Creek, Fresno, Los Angeles, Costa Mesa, Roseville, Riverside, Sacramento, San Francisco, Carlsbad, Oceanside, and San Diego, Sunnyvale, Carollo will deliver some courses

via E-Learning. E-Learning reduces travel costs and allows the Company to deliver training content more consistently. Carollo will provide Class/Lab, E-Learning in the following:

Business Skills – Training topics include Frontline Decision Making and Problem Solving and Leadership Skills.

Computer Skills – Training topics will focus on technology upgrades in equipment and software, primarily in 3D and 4D CAD-based applications, Microsoft Office 365, Blue Plan-it Decision Support System and other applications.

Commercial Skills – Training topics will focus on New Regulatory Changes in Municipal facilities, and Wastewater treatment for the Food Processing Industry.

Management Skills – Training will be provided in Leadership Skills for Supervisors/Managers.

Computer-Based Training – Commercial Skills: up to 33 hours of CBT training will be available.

Training Infrastructure

The Vice President of the Company will oversee the training from the Costa Mesa office. Each office will have an administrator who will coordinate with the Costa Mesa location to ensure training is scheduled and documented. Prospect Consulting Group will assist with project administration.

Commitment to Training

Carollo has an annual training budget of \$250,000 for all California facilities combined, which includes basic skills, employee orientation and mandated Human Resources compliance 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.

Green/Clean Operations

Carollo has a Sustainability Plan to guide its own efforts in becoming a more sustainable organization. The Company's planning efforts include a strategic sustainability framework which connects a triple bottom line Company Policy with nine 2025 Sustainability Objectives. Carollo strives to incorporate environmental, social, and economic considerations into decision-making processes for client projects, helping clients find sustainable solutions. The Company also provides resource conservation services for its clients, with a focus on water conservation and efficiency, nutrient recovery, energy efficiency and optimization, integrated water planning, water reuse/resources and energy audits. In addition, Carollo focuses on renewable energy and using waste to generate heat, and is leading the industry in enhancing anaerobic digestion with high-strength organic materials to increase and improve the production of digester gas.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %	
ET15-0456	Sacramento	5/21/15 – 5/20/17	\$19,300	\$16,807	87%
ET12-0164	Sacramento	10/24/11 – 10/23/13	\$99,828	\$13,950	14%

ET15-0456: This Agreement was right-sized as a result of the performance on the first project. Carollo was able to achieve 87% performance on its most recent ETP project. The Company trained and placed 61 incumbent and newly-hired retrainees.

ET12-0164: This Agreement was planned for a small number of trainees. Following the approval of the project, Carollo identified many processes that required it to focus on establishing Standard Operating Procedures (SOP).

Given the resources that had to be dedicated to establishing SOP's, Carollo was unable to complete all the training for the small number of planned trainees. Consequently, training hours were substantially reduced and many trainees were unable to meet the minimum 24 hours. The trainees did receive Continuous Improvement skills as funded in part by ETP, with the Company making up the shortfall. With SOP launched, the Company was ready to renew training and completed higher performance in the subsequent Agreement (ET15-0456).

DEVELOPMENT SERVICES

Carollo Engineers retained Prospect Consulting Group, Inc. in San Francisco to assist with development of this proposal for a flat fee of \$600.

ADMINISTRATIVE SERVICES

Carollo Engineers retained Prospect Consulting Group, Inc. in San Francisco 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//E-Learning Hours**

8-200

Trainees will receive any of the following:

BUSINESS SKILLS

- Project Management
- Quality Systems for New Initiatives
- Strategic Growth Development
- Technical Writing

COMMERCIAL SKILLS

- Impact of Climate Change on Municipal Facilities
- Industrial Wastewater Treatment for Food Processing Facilities
- New Regulatory Changes to Municipal Facilities
- New Treatment Technology

COMPUTER SKILLS

- Absorb Learning Management System
- Blue Plan-it®
- CAD Upgrades
- IT Ticketing System
- Liquidfiles
- Microsoft Office 365
- Microsoft Power BI
- ProjectWise Connect Edge
- ReservoirGrail

MANAGEMENT SKILLS (Supervisor/Manager Only)

- Leadership Skills for Supervisors

Computer-Based Training (CBT) Hours

0 – 33

COMMERCIAL SKILLS

- Continuous Improvement Skills for Engineering
 - Architectural Design Coordination (2 hours)
 - Civil Design Coordination (3 hrs. 30 min.)
 - Civil Design Coordination – Offsite Pipelines (3 hours)
 - Critical Thinking (4 hours, 30 min.)
 - Engineering Services During Construction (3 hours)
 - Intro to Carollo Project Engineering (3 hours)
 - Intro to Carollo's Quality Management Program (1.5 hrs.)
 - Intro to Cost Estimating (3 hours)

- Intro to Project Management (3 hours)
- Intro to Project Reporting (0.75 hours)
- Quality Management Procedures (3 hrs. 30 min.)
- Typical Details (2 hours)

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

DELEGATION ORDER



**Retrainee - Job Creation
Training Proposal for:**

CC of San Diego, Inc. dba California Closets

Small Business

ET18-0244

Approval Date: May 18, 2018

ETP Regional Office: San Diego

Analyst: C. Clady

CONTRACTOR

- Type of Industry: Manufacturing
 - Number of Full-Time Employees
 - California: 65
 - Worldwide: 65
 - Number to be trained: 52
 - Out-of-State Competition: Competitors Outside CA
 - Special Employment Training (SET): ☐ Yes ☒ No
 - High Unemployment Area (HUA): ☐ Yes ☒ No
 - Turnover Rate: 5%
 - Repeat Contractor: ☐ Yes ☒ No
- Priority Industry: ☒ Yes ☐ No
- Owner ☐ Yes ☒ No

FUNDING

- Requested Amount: \$29,198
- In-Kind Contribution: \$41,636

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Computer Skills, Mfg. Skills	51	8-60	0	\$546	\$17.03
				Weighted Avg: 21			
2	Retrainee Priority Rate SB <100 Job Creation	Business Skills, Computer Skills, Mfg. Skills	1	8-60	0	\$1,352	*\$14.19
				Weighted Avg: 52			

*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 Diego
- Occupations to be Trained: Designers, Manufacturing Staff, Installers, Managers, Leads
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #'s 1 & 2: \$1.03 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2011 and headquartered in Poway, CC of San Diego, Inc. dba, California Closets (California Closets) (www.califonriaclosets.com) manufactures custom closets, organizers, and closet storage systems. The Company has two facilities in San Diego; all three will participate in the training. The market has become highly competitive and to keep up with increased customer demand, California Closets expanded to include commercial and home developer customers. Clients include CalAtlantic, Pardee, Shea Homes and Bosa Development. The Company projects revenue growth of 39% for 2018.

To meet its expanded business and market needs, California Closets must have a skilled workforce to complete new work. However, the Company is challenged with finding workers skilled in the cabinetry industry. Therefore, California Closets is committed to retraining and cross training its employees.

ETP training will enable the Company to provide trainees with the necessary skills to meet customer expectations for quality work and remain competitive in the cabinet design industry.

Retrainee – Job Creation

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

To meet demands from its product expansion, California Closets has committed to hiring one new employee (Job Number 2). This new employee must have extensive training in Sales and Computer-Aided Design. The date-of-hire for trainee will be within the three-month period before contract approval or within the term-of-contract. This trainee will be hired into “net new job” as a condition of contract.

Training Plan

All training will be delivered via class/lab in the following:

Business Skills – Sales Training, Product Knowledge, Conflict Resolution and Coaching for Performance.

Computer Skills – Computer Aided Design Training, Computer Numerical Control Training and Enterprise Resource Planning.

Manufacturing Skills- Machine Technical Training for Leads and Installation Techniques Training.

Training Infrastructure

The Company is ready to begin training upon approval. The General Manager will oversee all project administration with staff at each facility to coordinate training. 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

-  Sales Training
-  Product Knowledge
-  Conflict Resolution
-  Coaching for Performance

COMPUTER SKILLS

-  Computer-Aided Design Training
-  Computer Numerical Control Training
-  Enterprise Resource Planning Training

MANUFACTURING SKILLS

-  Machine Technical Training for Leads
-  Installation Techniques Training

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
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TRAINING PROPOSAL FOR
Delta Pipeline Inc.
17-0929

Panel Meeting Date: 06/22/2018
Regional Office: North Hollywood Regional Office
Analyst Name: Marisol Niquet
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.

TOTAL ETP FUNDING: \$ 48,412.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 48,412.00	N/A	N/A	\$ 58,600.00

APPLICANT PROFILE

Company Summary	Delta is an underground pipeline construction company that installs storm drains, sewer, and water and fire lines.		
Industry Sector(s)	Construction		
Priority Industry	Yes		
No. Employees (Applicant)	State: 60	US: 60	World Wide: 60
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will enable Delta to identifying industry trends and by better equipping employees to respond to these trends.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	54	\$ 26.00	28	\$ 728	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	10	\$ 26.00	35	\$ 910	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1991 and headquartered in Long Beach, Delta Pipeline Inc. (Delta), is an underground pipeline construction company that installs storm drains, sewers, and water and fire lines. Customers include schools, medical buildings, retail stores, industrial spaces, real estate developers, general contractors and municipalities.

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	<p>In 2017, Delta proudly created an Employee Stock Ownership Plan (ESOP) and became 100% employee owned. This landmark decision allowed Delta to further establish meaningful benefits for recruitment, motivation and retention of its team members. Although the Company is growing and able to secure plenty of work, skilled Pipe-layers have become scarce and the lack of a skilled workforce in the underground construction industry has become a serious problem. Delta's mission is to offer an opportunity for unskilled workers to gain skills and ultimately develop a legitimate, long-term career.</p> <p>The Construction industry is requiring higher levels of learning to meet the expectations of productivity from estimating and project management to requiring new technologies, increased documentation, evolving and continuous safety training classes. To keep Delta relevant in the industry, the Company is investing in the above areas to bring efficiencies and value. Delta is currently moving towards improved accounting and project management software that will allow a more standardized approach in operations.</p> <p>This lengthy process demands a large financial investment by the Company and leadership participation for instruction, which has proven to be very successful and has increased retention.</p> <p>Business Skills will be offered to all occupations. Trainees will learn skills in negotiation, estimating business/relationship development, and operational effectiveness in order for the Company to remain competitive and productively execute projects.</p> <p>Commercial Skills will be offered to Field Construction Workers, Project Leads and Junior Field Construction Workers. Training will include learning procedures to LEED and Job Site Logistics. These skills will improve Field/Project productivity.</p>
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PROPOSED TRAINING PROJECT DETAILS

	<p>Computer Skills will be offered to all trainees. Trainees will improve job skills using MS Office and proprietary software (Total Project Logistics, On Screen Take off, Mobile app timekeeping and cost coding. etc.). Effective utilization of these software programs will enable trainees to become more productive and efficient.</p> <p>Continuous improvement will be offered to all trainees. Training will improve communication and leadership skills. Topics will include Project Planning and Quality Improvement, and Teamwork.</p> <p>Hazardous Material Skills will be offered to Field Construction Workers and Project Leads. Training will include the handling of hazardous materials and chemicals, and learn the correct way to clean and dispose of such materials.</p>
Training Infrastructure and Administrative Plan	<p>Delta spends an estimated \$89,500.00 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.</p> <p>The Company has identified several Human Resources personnel to oversee training delivery, scheduling, and tracking. The Company has also retained an administrative subcontractor to ensure that training administration and documentation adhere to ETP requirements</p> <p>Training will take place at the Company's location in Long Beach and will be delivered by a combination of in-house subject matter experts and outside vendors to be identified during the term of the contract.</p>
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.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training in Business Skills, Computer Skills and Continuous	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Improvement (Attachment 2).	
Estimators, Field Construction workers and Project Leads will receive training in Commercial Skills (Attachment 2).	
Field Construction workers and Project Leads will receive training in Hazardous Material Skills (Attachment 2).	

Delivery Method/Level	Productive Laboratory
Summary	
Field Construction workers and Project Leads will receive training in Productive Laboratory (Attachment 2).	

4. Additional Company or Training Project Details

Certified Safety Training

OSHA 10/30 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

Delta has developed a 6-month curriculum (Delta Pipeline University-DPU) which allows the Company to hire entry-level positions, and through the job skills program and training programs, those team members will grow into skilled Pipe-layers, Operators, Foreman, Project Engineers, and Estimators. As business continues to grow (20% since last year) along with the overall increase in construction contracts, the Company needs hire and train workers to keep up with customer demand, operational effectiveness, project outcome and financial results. As a result, Delta is committed to hiring 10 junior Field Construction Workers. 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

4.1 Program Waivers

No waivers have been applied to this proposed project.

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$ 4,900.00
Administrative	Training Funding Source	Seal Beach	13% of funding earned
Training	None selected to date	N/A	N/A

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.

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Coaching
	Communication
	Customer Service
	Design Build Budgeting
	Estimating
	Financial Risk Analysis
	Job Costing
	Leadership
	Marketing & Business Development, Sales
	Product and Service Knowledge
	Project Management (Financial Forecasting, Issue Logging)
Commercial Skills (Standard)	Job Cost
	Change Orders
	Documentation (Daily Logs, RFI (Request for Inform
	Equipment Operations and Maintenance
	Field Operational Procedures
	Green Construction-LEED
	Job Site logistics
	Materials Ordering, Handling and Storage
	OSHA 10
	OSHA 30
	Power Tool Use and Guarding
	Project Planning
	Storm Water Pollution Prevention Program
	Trenching and Excavation
Computer Skills (Standard)	Blue Beam
	Accounting and Project Management
	Asset Tracker
	Auto CAD
	Building Information Modeling
	Construction Cost Tracking
	Dashboard EBM- Estimating
	EBM- Estimating
	Microsoft Office, Project
	QuickBooks
	Timekeeping system/Mobile app
	Total Project Logistics
Continuous Improvement Skills	Goal Setting and Accomplishment
	Productivity Improvement

Attachment 2 - Training Delivery and Curriculum Listing

Provided below are details on the types of training planned for this proposed Training Project.

	Project Planning
	Quality Improvement
	Teamwork
Hazardous Materials Skills	Hazardous Communication/Operations

Delivery Method /Level	Productive Laboratory						
Training Type (Level)	Planned Course Offerings						
Commercial Skills	Field Operations						
PL Justification and Details							
Explain the need for productive laboratory (PL) training	Construction of underground pipe assembly is highly technical training is not solely suitable for classroom instruction. Classroom training is not an adequate means of delivery because trainees must learn how to operate equipment and build underground pipe assembly that does not fit easily into a classroom setting. Customer specified pipe and equipment used is varied and would be too costly to build in a classroom. Complex underground pipe assembly systems can only be located at customer site						
Describe the Equipment/Processes to be used in delivering the PL training	construction of underground pipe and assembly						
Describe Trainer Qualifications	Instructors are the most knowledgeable company employees, with 20+ years work/industry experience and certification on equipment/systems from numerous equipment manufacturers.						
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	<table> <tr> <th>Trainer</th><th>Trainee</th></tr> <tr> <td>1</td><td>1</td></tr> <tr> <td>1</td><td>1</td></tr> </table>	Trainer	Trainee	1	1	1	1
Trainer	Trainee						
1	1						
1	1						
Ratio for One Class, or Minimum When More than One Class							
Ratio for Maximum Ratio When More than One Class							
PLT Approval	Yes						



Training Proposal for:

ESET, LLC

Agreement Number: ET19-0134

Approval Date: June 11, 2018

ETP Regional Office: San Diego

Analyst: J. Davey

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee	Industry Sector(s):	Technology/IT Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 176	U.S.: 205	Worldwide: 1,563
<u>Turnover Rate:</u>	7%		
<u>Managers/Supervisors:</u> (% of total trainees)	7%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$49,400		\$0	\$0		\$49,400

In-Kind Contribution:	100% of Total ETP Funding Required	\$88,060
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp.	100	8-200	0-140	\$494	\$17.03
				Weighted Avg: 19			

Minimum Wage by County: \$17.03 per hour in San Diego County

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

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

Up to \$2.03 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Engineering/Information Technology/Research & Development Staff		23
Marketing/Sales Staff		25
Managers/Directors		7
Support Staff		45

INTRODUCTION

Founded in 1987 and headquartered in Bratislava (Slovakia), ESET, LLC (ESET) (www.eset.com) develops high-performing technological security solutions for residential and corporate customers. The Company's San Diego location is the sole North American facility and provides sales, distribution and malware research.

Known for its proactive threat-detection capabilities, ESET specializes in anti-virus, anti-theft, and anti-phishing and security software; social media scanner; firewall; and parental control. The Company's products include: ESET Security for Microsoft SharePoint Server, a data server security product; ESET Mobile Security for Android smartphone and tablet users; and, ESET Secure Authentication, which provides remote access network security.

PROJECT DETAILS

This is ESET's third ETP project, and the third in the last five years. In its first ETP project, ESET established the beginnings of a formalized training program. Most of the training was in Business and Computer Skills. For its second proposal, the Company delivered training to newly-hired trainees and incumbent workers who did not participate in the first project. The Company expanded into a variety of new markets including Healthcare, Finance and Manufacturing. Employees were trained in additional skills for developing and marketing products for these new segments.

For this third project, ESET continues to develop, release and market new products to new market segments. The Company plans to release its new Enterprise product line that will propel the Company into a new, large-business market. There is high demand for security products that can detect threats in advance (Advanced Threat Protection – ATP) and provide powerful data if an attack is underway. These new products will enable ESET to enter this market place. To penetrate this market successfully, the Company needs to ensure its employees are well trained in the concept of Endpoint Detection and Response (EDR) and on the most effective sales tactics to penetrate this market. No trainee will receive skills in the same course topics that were provided in a previous project; however, they may receive a more advanced or improved level of the same training received in a previous project.

With the launch of new EDR products this year, the Company must provide its frontline workforce with supplemental training, not only on the products themselves, but also on the technology behind them. These new products are more complex than other ESET products and will require considerable training to prepare the Company's Engineers and Technical Support Staff to sell and support these products. ESET also plans to release a new cloud solution for its remote administrator product, allowing the Company to conduct sales with small businesses that was previously unattainable.

In addition to new product training, ESET is in the process of completely redefining its sales processes and introducing new programs to help its employees and partners to be more efficient and effective. This includes the implementation of a new sales enablement software called Mindmatrix, which will allow the Company's partners to have better visibility and flexibility around their leads, and campaigns. ESET is also planning to migrate its support team to the Salesforce platform by implementing the Salesforce service cloud. This is a major shift for the Company and will require supplemental skills training to ensure all employees are prepared for the changes and their responsibilities on the new system.

Training Plan

ESET will provide a combination of Class/Lab, E-Learning, and Computer-Based Training (CBT) in the skills below.

Business Skills: Training will be offered in New/Upgraded Products & Markets, Business Processes and Train-the-Trainer.

Computer Skills: Training will be offered in ESET Proprietary Systems and Software, SharePoint, Cisco JavaScript and Mobile Security Technology.

Continuous Improvement: Training will be offered in Critical Thinking/Assessment, Problem Solving, Project/Program Management, and Team Dynamics/Team Effectiveness.

Computer-Based Training

ESET requests approximately 140 CBT hours per-trainee for 30-40 trainees. Much of the CBT is proprietary, highly technical course material developed in-house by content developers. Self-paced CBT will allow frontline workers to receive training during opportune times when it best suits their work schedule. It will also allow trainees to receive on-demand training quickly on new product launches. CBT will supplement planned, instructor-led learning in an effort to ensure a solid understanding of concepts presented.

Commitment to Training

ESET's 2018 training budget is approximately \$800,000 for its California workforce. The Company provides anti-harassment, diversity, basic computer skills, new employee orientation and on-boarding, and expense report processing. ETP funds will not displace the existing financial commitment to training.

➤ Training Infrastructure

The Learning & Development Program Manager (LDPM) is responsible for managing, scheduling, and documenting training. The LDPM will maintain contact with ETP staff and is responsible for making sure that training is scheduled, trainers are aware of documentation requirements, and rosters are completed and collected. ESET has retained Training Funding Partners (TFP) to assist in administrative duties.

Training will be provided by in-house experts and vendors as needed.

Director Occupations

The job duties of Directors are equivalent to those of frontline managers. These Directors do not set company policies and thus, qualify to participate in ETP-funded training.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0444	San Diego	5/3/16 – 5/2/18	\$36,400	\$36,400 (100%)
ET14-0241	San Diego	12/31/13– 12/30/25	\$64,600	\$35,838 (55%)

ET16-0444: This project was “right-sized” to correspond with the amount earned on the first Agreement. ESET was able to maximize the benefit of ETP funding in its second project due to the beneficial effect of project management changes to correct record keeping deficiencies. Because of their 100% performance, ESET is now requesting additional funding commensurate with their additional training needs and their demonstrated capacity to implement and manage a larger project.

ET14-0241: The primary issue that contributed to poor performance was incomplete, inaccurate rosters. The Company also had difficulty meeting the minimum 24 training hours per-trainee. However, towards the end of the Agreement, the Company spent considerable time and effort educating its key staff on proper procedures for documenting training, which increased eligible hours delivered near the end of term.

DEVELOPMENT SERVICES

TFP in Fountain Valley assisted with development for a flat fee of \$4,700.

ADMINISTRATIVE SERVICES

TFP will also perform administrative services for a fee not to exceed 12% of payment earned.

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Process Skills
- Customer Service/Support
- Conflict Resolution/Conflict Management
- Finance for Non-Financial employees
- Upgraded Marketing/Sales Skills
- New/Upgraded Products and Markets
- Time Management Skills
- Train-the-Trainer

COMPUTER SKILLS

- ESET Proprietary Systems and Software
- Intermediate/Advanced Microsoft Office Suite
- SharePoint
- NetSuite
- Comp TIA A+ Certification
- Mobile Security Technology
- C#
- Agile
- Adobe
- Angular
- ASP.NET
- JavaScript
- Cisco CCNA
- CISSP
- CASP
- Photoshop
- Kanban and Scrum
- Ethical Hacking
- Powershell
- Wireshark
- jQuery

CONTINUOUS IMPROVEMENT

- Critical Thinking/Assessment Skills
- Effective Goal Setting
- Leadership/Coaching Skills
- Problem Solving Skills
- Project/Program Management
- Process/Performance Reengineering
- Team Dynamics/Team Effectiveness

CBT Hours

0-140

BUSINESS SKILLS

- Active Listening Skills for Professionals (0.5 hours)
- Bomgar Agent Training for CC (0.5 hours)
- Choosing the Right Interpersonal Communication Method to Make Your Point (0.5 hours)
- Communications: How to Talk, Write, Present, and Get Ahead (2.49 hours)
- Dealing with Irrational Customers and Escalating Complaints (1.36 hours)
- Diplomacy and Tact in Challenging Situations (0.5 hours)
- ESET Business Products Crash Courses (0.5 hours)
- ESET Business Products Overview (2 hours)
- ESET Certified Sales Professional - International Version (3 hours)
- ESET Certified Sales Professional (3 hours)
- ESET Certified Sales Professional Exam (0.5 hours)
- ESET Certified Solution Specialist (0.5 hours)
- ESET Enterprise Products: Sales Talking Points (0.5 hours)
- ESET for Small Office Home Office (0.5 hours)
- ESET Licensing Specialist Training (0.5 hours)
- ESET Secure Enterprise Agreement: Sales Training (0.5 hours)
- ESET Solutions Specialist Course (0.5 hours)
- ESET Threat Intelligence--Product Overview (0.5 hours)
- ESET Training Bytes: How to Sell ESET Business Products (0.5 hours)
- ESET V10 Consumer Products for Windows Overview Training (0.5 hours)
- ESET Windows Consumer Products - Sales Training (0.5 hours)
- Getting Started in the ESET Learning Vault (0.5 hours)
- Getting Started with My ESET Zone for Employees (0.5 hours)
- Getting Started with My ESET Zone for Managers (0.5 hours)
- GREYCORTEX MENDEL Sales Training (0.5 hours)
- How Culture Impacts Communication (0.5 hours)
- How to Manage Difficult Conversations (0.5 hours)
- Introduction to Emotional Intelligence (2.14 hours)
- Knowledgebase Walkthrough (0.5 hours)
- Mastering Active Listening in the Workplace (0.5 hours)
- Planning for Business Analysis (3.06 hours)
- Project Management at ESET (0.5 hours)
- Ready, Set, Sell: Program Overview (0.5 hours)
- Roadblocks to Excellent Listening (0.5 hours)
- Safetica: Selling Safetica (0.5 hours)
- Sales Chat Training (0.5 hours)
- Training Bytes: How to Sell DESlock+ Encryption (0.5 hours)
- Training Bytes: How To Sell ESET Endpoint Solutions (0.5 hours)
- Training Bytes: How to Sell ESET Mail Security (0.5 hours)
- Training Bytes: How To Sell ESET Remote Administrator (0.5 hours)
- Training Bytes: How to sell ESET Secure Authentication (0.5 hours)
- Training Bytes: How To Sell Xopero Backup Solutions (0.5 hours)

- Trust Building through Effective Communication (0.5 hours)
- Why ESET - For Enterprise (0.5 hours)
- Xopero Data Protection Sales Overview (0.5 hours)

COMPUTER SKILLS

- Adobe Analytics Analysis Workspace (2.09 hours)
- Adobe Analytics Fundamentals (5.94 hours)
- Adobe Media Encoder CC Fundamentals (1.38 hours)
- Adobe Story CC Fundamentals (1.76 hours)
- Advanced Color Grading in Adobe SpeedGrade CC and Premiere Pro CC (3.11 hours)
- Advanced Editing Workflows in Lightroom (1.57 hours)
- Advanced Security for CCNA Security (210-260) IINS (5.37 hours)
- After Effects CC Fundamentals (5.67 hours)
- Algorithms and Data Structures - Part 1 (9.69 hours)
- Amazon Web Services Fundamentals for System Administrators (7.33 hours)
- An Introduction to Microsoft Project 2010 and 2013 (5.30 hours)
- Angular Fundamentals (9.45 hours)
- Angular: Getting Started (5.66 hours)
- AngularJS: Get Started (2.97 hours)
- Apex Academy: Absolute Beginner's Guide to Coding in Salesforce (2.51 hours)
- Apple Certified Technical Coordinator 10.11: Configuring and Monitoring OS X Server (3.95 hours)
- Architecture and Design for CompTIA Security+ (4.26 hours)
- ASP.NET Core Fundamentals (5.82 hours)
- Audition CC Building on the Fundamentals (2.36 hours)
- Audition CC Fundamentals (1.83 hours)
- AWS Security Fundamentals (2.07 hours)
- AWS Security Operations: Securing Core AWS Infrastructure Services (3.90 hours)
- Basics of Unit Testing for C# Developers (2.16 hours)
- Beginning PowerShell Scripting for Developers (6.33 hours)
- Blockchain Fundamentals (7.25 hours)
- Building a JavaScript Development Environment (10.65 hours)
- Building a Pragmatic Unit Test Suite (3.70 hours)
- Building Applications with React and Flux (5.13 hours)
- Building Applications with React and Redux in ES6 (12.46 hours)
- Building Data-Driven React Applications with Relay, GraphQL and Flux (3.16 hours)
- Building Scalable React Apps (3.81 hours)
- Building Web Applications with Node.js and Express 4.0 (4.72 hours)
- Building Your First ASP.NET Core Web Application (4.89 hours)
- C Programming Language Fundamentals (1.44 hours)
- C# Collections Fundamentals (11.88 hours)
- C# Equality and Comparisons (14.56 hours)
- C# Fundamentals with Visual Studio 2015 (32.18 hours)
- Camera Lens Fundamentals (1.01 hours)

- Centralized Logging with the Elastic Stack: Getting Started (2.35 hours)
- Cisco CCNA Security: AAA and IP Security (3.07 hours)
- CISSP® - Communications and Network Security (1.65 hours)
- CISSP® - Security and Risk Management (12.15 hours)
- CISSP® - Security Engineering (2.50 hours)
- Cloud Compete Training (0.5 hours)
- CLR Threading (2.63 hours)
- CompTIA Security+ (SY0-401) Access Control and Identity Management (6.79 hours)
- CompTIA Security+ (SY0-401) Application, Data and Host Security (9.13 hours)
- CompTIA Security+ (SY0-401) Compliance and Operational Security (40.67 hours)
- CompTIA Security+ (SY0-401) Cryptography (7.70 hours)
- CompTIA Security+ (SY0-401) Network Security (38.11 hours)
- CompTIA Security+ (SY0-401) Threats and Vulnerabilities (18.68 hours)
- CompTIA Storage+ Part 1: Storage Fundamentals (3.32 hours)
- Computing, Communication, and Business Integration for CASP (CAS-002) (1.98 hours)
- Create and Manage Virtual Machines on Microsoft Azure (13.14 hours)
- Cybersecurity Threats: Ransomware (2.53 hours)
- Employee Guide: Getting Started in the ESET Learning Vault (0.5 hours)
- Endpoint (RA5) Technical Training (1 hours)
- Enterprise Security for CASP (CAS-002) (5.85 hours)
- Enterprise Security: Policies, Practices and Procedures (10.53 hours)
- Enterprise WPF with XAML and C# from Scratch (2.54 hours)
- ESET Cyber Security Product Overview (0.5 hours)
- ESET Malware Removal Training (0.5 hours)
- ESET MSP Administrator (0.5 hours)
- ESET NOD32 and ESET Smart Security 9 (0.5 hours)
- ESET Product Specialist Quiz (0.5 hours)
- ESET Secure Authentication Installation & Configuration (0.5 hours)
- ESET Security Awareness Training: Save Netropolis (0.5 hours)
- ESET Vidyo Training (0.5 hours)
- Ethical Hacking: Buffer Overflow (4.04 hours)
- Ethical Hacking: Cloud Computing (5.97 hours)
- Ethical Hacking: Cryptography (0.88 hours)
- Ethical Hacking: Denial of Service (2.83 hours)
- Ethical Hacking: Enumeration (3.00 hours)
- Ethical Hacking: Evading IDS, Firewalls and Honeypots (3.01 hours)
- Ethical Hacking: Hacking Mobile Platforms (4.69 hours)
- Ethical Hacking: Hacking Web Applications (4.82 hours)
- Ethical Hacking: Hacking Web Servers (2.43 hours)
- Ethical Hacking: Hacking Wireless Networks (5.90 hours)
- Ethical Hacking: Malware Threats (10.61 hours)
- Ethical Hacking: Penetration Testing (4.72 hours)
- Ethical Hacking: Reconnaissance/Footprinting (3.48 hours)
- Ethical Hacking: Scanning Networks (3.77 hours)

- Ethical Hacking: Session Hijacking (6.93 hours)
- Ethical Hacking: Sniffing (2.19 hours)
- Ethical Hacking: Social Engineering (4.61 hours)
- Ethical Hacking: SQL Injection (10.86 hours)
- Ethical Hacking: System Hacking (3.31 hours)
- Ethical Hacking: Understanding Ethical Hacking (14.03 hours)
- Everyday PowerShell for Developers (4.05 hours)
- GREYCORTX MENDEL Technical Training (0.5 hours)
- Hardware & Network Troubleshooting for CompTIA A+ (220-901) (11.99 hours)
- Hardware for CompTIA A+ (220-901) (69.80 hours)
- IGNITE for Remote Employees (0.5 hours)
- Introduction to CompTIA and the Network+ Exam (N10-006) (1.11 hours)
- Introduction to Drafting and Annotation in AutoCAD (2.22 hours)
- Introduction to Git (1.01 hours)
- Introduction to MEAN.JS (2.10 hours)
- Introduction to Microsoft Planner (0.88 hours)
- Introduction to Networking for Cisco CCNA 200-125/100-105 (1.97 hours)
- Introduction to Node.js (2.80 hours)
- Introduction to OneNote 2013 (0.98 hours)
- Introduction to PowerShell (2.70 hours)
- Introduction to Regular Expression (Regex) (2.79 hours)
- Introduction to SQL (6.09 hours)
- Introduction to SVN (2.95 hours)
- Introduction to The .NET BackgroundWorker Component (2.13 hours)
- Introduction to the CompTIA A+ (220-901) Certification Exam (4.33 hours)
- Introduction to the CompTIA A+ (220-902) Certification Exam (2.17 hours)
- Introduction to Virtualization (0.5 hours)
- Introduction to Wireshark (2.73 hours)
- Learning Vault Admin Training Course (0.5 hours)
- Mobile Devices for CompTIA A+ (220-901) (7.35 hours)
- My ESET Portal (0.5 hours)
- Network Architecture for CompTIA Network+ (N10-006) (44.52 hours)
- Network Operations for CompTIA Network+ (N10-006) (27.30 hours)
- Network Penetration Testing Using Python and Kali Linux (1.39 hours)
- Network Security for CompTIA Network+ (N10-006) (25.56 hours)
- Networking for CompTIA A+ (220-901) (9.14 hours)
- Networking for CompTIA Server+ (SK0-004) (1.35 hours)
- Photoshop CC Camera Raw (3.00 hours)
- Photoshop CC Fundamentals (6.78 hours)
- Photoshop CC Practical Projects (2.27 hours)
- Photoshop CC Selections (2.41 hours)
- Photoshop CC Smart Objects (1.01 hours)
- Photoshop CC Working with Curves (2.01 hours)
- PowerShell v3/v4 Essentials for IT Admins Part 1 (8.68 hours)
- Practical LINQ (3.55 hours)
- Practical Networking (3.44 hours)
- Premiere Pro CC Building on the Fundamentals (3.45 hours)

- Premiere Pro CC Fundamentals (3.92 hours)
- Preparing for and Executing Incident Recovery (3.41 hours)
- Preparing to Migrate to Office 365 (2.45 hours)
- Profile Manager for Mac (1.06 hours)
- Python Fundamentals (10.39 hours)
- Python: Getting Started (14.99 hours)
- Safetica Technical Training (0.5 hours)
- Salesforce Getting Started Videos (0.5 hours)
- Salesforce Instructor Led Training Demonstration (0.5 hours)
- Security for CompTIA A+ (220-902) (4.53 hours)
- Security for CompTIA Server+ (SK0-004) (4.39 hours)
- Standards, Practices, and Theory for CompTIA Network+ (N10-006) (16.61 hours)
- Storage for CompTIA Server+ (SK0-004) (1.14 hours)
- Technical Explainer Videos: Computer and Security Basics (0.5 hours)
- The ShoreTel Phone System (0.5 hours)
- Troubleshooting for CompTIA Network+ (N10-006) (20.47 hours)
- Troubleshooting for CompTIA Server+ (SK0-004) (4.13 hours)
- Xopero: Technical Walkthrough (0.5 hours)

CONTINUOUS IMPROVEMENT

- Agile Estimation (1.55 hours)
- Agile for One (1.75 hours)
- Agile Fundamentals (10.85 hours)
- AgilePM® Project Management (2.45 hours)
- Beginner's Guide to Project Management (1.68 hours)
- Being a Fair and Caring Manager (0.5 hours)
- Effectively Directing and Delegating as a Manager (0.5 hours)
- Facing Challenges as a First-Time Manager (0.5 hours)
- Facing the Management Challenges of Difficult Behavior and Diverse Teams (0.5 hours)
- Introduction to Project Management & the PMP® Exam (2.33 hours)
- Leading through Positive Influence (0.5 hours)
- Leveraging Emotional Intelligence (0.5 hours)
- Managing Employee Development (0.5 hours)
- The Reality of Being a First-time Manager (0.5 hours)

<p>Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.</p>
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DELEGATION ORDER



**Retrainee - Job Creation
Training Proposal for:
Graphic Business Solutions, Inc.**

Small Business

ET18-0237

Approval Date: May 15, 2018

ETP Regional Office: San Diego

Analyst: H. Bernard

CONTRACTOR

- Type of Industry: Manufacturing
 - Number of Full-Time Employees
 - California: 65
 - Worldwide: 70
 - Number to be trained: 54
 - Out-of-State Competition: NAICS Code Eligible
 - Special Employment Training (SET): ☐ Yes ☒ No
 - High Unemployment Area (HUA): ☐ Yes ☒ No
 - Turnover Rate: 3%
 - Repeat Contractor: ☐ Yes ☒ No
- Priority Industry: ☒ Yes ☐ No
- Owner ☐ Yes ☒ No

FUNDING

- Requested Amount: \$34,060
- In-Kind Contribution: \$36,973

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, HazMat, PL - Manuf Skills	50	8 - 60	N/A	\$650	\$17.03
				Weighted Avg: 25			
2	Retrainee Job Creation Initiative Priority Rate SB <100	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, HazMat, PL - Mfg. Skills	4	8 - 60	N/A	\$390	*\$14.19
				Weighted Avg: 15			

*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): San Diego
- Occupations to be Trained: Production Staff, Administrative Staff, Supervisors/Managers, Customer Service/Sales Staff
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #'s 1 & 2: \$2.50 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source of Seal Beach assisted with the development of this proposal for a fee of \$1,900.
- Administrative Services: Training Funding Source of Seal Beach will also assist with administration for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1994, and headquartered in El Cajon, Graphic Business Solutions, Inc. (www.gogbs.com) (GBS), designs, develops, manufactures and distributes customized marketing solutions to help customers grow their business. The Company designs and produces various products such as greeting cards, wrapping paper, colored envelopes,

promotional materials, sports schedules, labels and more. GBS's customers include real estate agents/brokers, pizza franchises & shops, sales brokers, and professional and college sports teams. The Company employs 5 staff members outside of California, however only staff at the El Cajon location will participate in training under this project.

The Company is anticipating growth of approximately 20-25% over the next 2 years due in part to expanded product lines including apparel embroidery, signs and refrigerator magnets. The Company has invested in new embroidery equipment as well as new production equipment, including a new CNC machine and a printer installed in March 2018 at a cost of approximately \$500,000. These new pieces of equipment will require training for Production Staff to ensure safe and efficient operations. In addition, GBS will need to train Sales and Administrative Staff on the new products being developed to effectively work with customers.

GBS also identified ongoing quality improvements critical to company success. This includes training for Production Staff on quality and process improvements aimed at increasing efficiencies. GBS will also train Customer Service and Sales Staff in communication and customer service skills to provide high quality products and a user friendly experience for its clients. Finally, the Company is constantly working to improve its website and internal software systems and will provide training to all staff on web design, Customer Relation Management software and design software.

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.

Due to growth and diversification of product lines, GBS expects to hire 10-12 new staff, 4 of which will be included in this project (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 in-house staff and vendors via classroom/laboratory and productive laboratory methodologies. Training will be provided as follows:

Business Skills: Communication Skills, Problem Solving Techniques, Customer Relations, Leadership Skills, Project Management, Sales Skills

Computer Skills: Adobe Creative, Customer Relationship Management Software and Web Design

Manufacturing Skills: Equipment Operations, Inspection Techniques, Good Manufacturing Practices, Maintenance & Troubleshooting and Standard Operating Procedures

Continuous Improvement: Process Improvement, Quality Improvement and Teambuilding

Hazardous Materials: Training will be provided to ensure all staff are fully trained on topics related to the safe handling, and proper disposal of hazardous materials. No industry certification will be earned after training is completed.

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.

PL training will be provided for Production Staff on equipment operations. GBS expects to train 20 trainees with an average of 15 hours of training on new equipment. PL will also be utilized to cross train staff on equipment they may not be familiar with. GBS expects that some of the raw materials utilized during training may spoil and that productivity will be greatly impacted during training. The PL trainer to trainee ratio will not exceed 1:1.

Training Infrastructure

GBS's Accounting Manager will oversee and administer the ETP project with support from company management who will assist in scheduling training and submitting completed ETP training rosters. In addition, Training Funding Source will be retrained 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

- Communication Skills
- Customer Relations
- Leadership/Coaching Skills
- Presentation Skills
- Product Knowledge
- Project/Program Management
- Sales Skills

MANUFACTURING SKILLS

- Design & Prototyping
- Equipment/Printing Operations
- Inspection Techniques
- Good Manufacturing Practices
- Inventory Processes
- Maintenance & Troubleshooting
- Pre-Press
- Product Assembly/Packaging/Shipping Operations
- Preventative Maintenance
- Standard Operating Procedures

COMPUTER SKILLS

- Adobe Creative Software
- Customer Relationship Management (CRM) Software
- Management Information System (MIS) Software
- Microsoft Office Suite
- Web Design Procedures
- Web to Print Software

CONTINUOUS IMPROVEMENT

- Process Improvement
- Problem Solving Tools & Techniques
- Quality Improvement
- Teambuilding

HAZARDOUS MATERIALS

- Hazardous Materials Communication/Handling
- Material Safety Data Sheet

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

Productive Lab Hours (Trainer to Trainee Ratios 1:1)

0 - 24

MANUFACTURING SKILLS

- Equipment Operations

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
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TRAINING PROPOSAL AMENDMENT
LIVIE AND LUCA LLC
Approval Type: Delegation
Reference Number: 17-0603
Contract Number: 17CS-0022-000

Panel Meeting Date:

Revision Number: 1

Regional Office: San Francisco Bay Area Regional Office

Requested Date: 02/03/2018

Analyst Name: Wang, Samantha

Revision Status: In Executive Review

Contract Term Date: 6/23/2017 - 6/22/2018

Effective Date: 1/16/2018

Proposal Type: Single Employer Contract (SE)

Critical Proposal: No

Funding Source: OSC

FUNDING AMENDMENT:

Current Funding (\$)		Requested Funding Increase (\$)		Revised Funding (\$)	
\$11,960.00		\$7,020.00		\$18,980.00	
Training Cost	Admin Cost	Support Cost		Substantial Contribution	Total In Kind
\$16,505.00	\$2,475.00	N/A		\$0.00	\$16,100.00

PROJECT PROFILE

Repeat Contractor:	No				
High Unemployment Area:	No		Turn Over Rate(Applicant): 33.00 %		
Industry Sector			Priority Industry		
Manufacturing			Yes		
Trade (Wholesale)			No		

AMENDMENT REQUEST DETAILS:

Reason for the Amendment Request:

We are requesting a higher maximum for this project. We have several or close to 60 hours and are asking for a higher limit to 100 hours since many of the trainees impacted have additional hour so important training to complete. We also are asking for a time extension to LDT of 03/24/2019 and end date of 06/22/2019 Total funding would be \$18,980 Thank you-

REVISED ITEMS:

Costing Group

Attribute	Job Title	No. Trainees		Min Training Hours		Max Training Hours		Estimated Training Hours	
		From	To	From	To	From	To	From	To
	Group No. 1 Location: LIVIE AND LUCA LLC								
S-RET	Operations/Design	4	4	8.00	8.00	60.00	100.00	46.00	80.00
	Customer Service/Sales	4	4	8.00	8.00	60.00	100.00	46.00	80.00
S-RET-OWNER	Owner	2	2	8.00	8.00	60.00	100.00	46.00	45.00

Contract Term

Revision	From	To
Term End Date	06/22/2018	6/22/2019

Waiver Added

Waiver Source	Waiver Choice
<i>Waiver: Cap/Max Hours of Training</i>	
Costing Group #1	60.00
Costing Group #1	60.00
Costing Group #1	60.00

Amended Funding Detailed

Funding	Group No.	Attributes	Number Of Trainees	Weighted Average Hours	Reimbursement Rate	Cost Per Trainee	Cost Per Group
OSC	1	S-RET-OWNER	10	73	\$26.00	\$1,898.00	\$18,980.00
		Funding Total:	10				\$18,980.00
		Grand Total:	10				\$18,980.00

Legend of Attributes	
Code	Description
S	Single Employer
RET	Retrainee
OWNER	Owner

Introduction

Livie and Luca LLC (Livie), designs and markets high-end shoes and accessories for babies and children. The shoes are designed to be environmentally friendly, lightweight, flexible, functional, and breathable. Using designs sent from its Emeryville's facility, the shoes are then manufactured in China in certified shoe making factories. The shoes are made from safe and sustainable materials such as lead free leather, recycled thermoplastic rubber, and natural canvas to meet the Consumer Product Safety Improvement Act (CPSIA). Livie markets and sells the products through their customer base such as Nordstrom, Zappos, Amazon, and eBay.

Amendment Details

Livie requests to increase the maximum training hours from 60 to 100 hours and increase the weighted average hours. Livie has been excelling in its training delivery, with four trainees reaching the maximum 60 hour cap. Trainees will require additional training and cross-training as the Company merges customer services for the accounts receivable and wholesale departments. The Company is also training Marketing on 90-day strategic/goal planning. In addition, Livie needs to extend the contract end date by one year, from June 22, 2018 to June 22, 2019. The Company has been experiencing an increase in business, thus making it difficult to release staff for training. Extending the Contract term will allow more time to deliver training. Livie requests a retroactive effective date of January 16, 2018, the date of initial contact by the company representative.

Recommendations

For the reasons set forth above, staff recommends approval of this Amendment.

ACTIVE CONTRACT PERFORMANCE

This table summarizes active contract(s) performance for LIVIE AND LUCA LLC

Contract Number	Approved Amount	Term	Total No. Trainees (Estimated)	Trainees Enrolled	Trainees Completed Training	Total Trainees Retained
17CS-0022-000	\$11,960.00	06/23/2017 - 06/22/2018	10	10	0	0

Curriculum
Exhibit B

Classroom /Simulated Laboratory

Training Type (Level)	Course/Class Topic
Business Skills	Accounting
Business Skills	Coaching/Communication
Business Skills	Credit & collection skills
Business Skills	Customer Relations
Business Skills	Design/Merchandising
Business Skills	Goal Setting
Business Skills	Inventory Control
Business Skills	Product Knowledge
Business Skills	Project Management
Business Skills	Selling tactics
Business Skills	Time Management
Business Skills	Writing
Continuous Improvement Skills	Leadership
Continuous Improvement Skills	Process/Quality Improvement
Continuous Improvement Skills	Teambuilding
Commercial Skills (Standard)	Inspection Techniques
Commercial Skills (Standard)	Quality Control
Computer Skills (Standard)	Amazon, Zappos, Nordstrom Portal
Computer Skills (Standard)	Blue Cherry ERP Software
Computer Skills (Standard)	E Commerce tools
Computer Skills (Standard)	E-Mail marketing tools
Computer Skills (Standard)	Electronic Data Interchange
Computer Skills (Standard)	Factor Financing
Computer Skills (Standard)	Microsoft Office
Computer Skills (Standard)	Talkdesk
Computer Skills (Standard)	Zendesk



**TRAINING PROPOSAL FOR
NIENOW & TIERNEY, LLP
18-0588**

Panel Meeting Date: 06/22/2018
Delegation Order Date: 06/06/2018
Regional Office: San Diego Regional Office
Analyst Name: Cassandra Clady
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.

TOTAL ETP FUNDING: \$ 16,940.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 16,940.00	N/A	\$ 0.00	\$ 27,720.00

APPLICANT PROFILE

Company Summary	Nienow & Tierney, LLP is a certified public accounting and consulting company that provides tax and financial services to large and small businesses. The Company specializes in corporate tax returns, investment, and property management taxes.
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Industry Sector(s)	Professional, Scientific, and Technical
Priority Industry	No
No. Employees (Applicant)	State: 20 US: 20 World Wide: 20
Turnover Rate (Applicant)	4.00 %
Repeat Contractor	No

High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Nienow & Tierney plans to provide training in Business, Commercial, Management, and Computer skills to improve efficiencies necessary to be competitive in the tax industry. Training will also keep employees apprised of new tax laws and regulations.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Owner, Retrainee	1	\$23.00	55	\$ 1210	8 - 60
1	Retrainee	12	\$ 23.00	55	\$ 1210	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	1	\$ 23.00	55	\$ 1210	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2000, and headquartered in Tustin, Nienow & Tierney, LLP (www.ntcpas.com) (Nienow & Tierney) provides highly technical and innovative tax, accounting and advisory services. Nienow & Tierney's goal is to serve as a core advisor to clients. The Company's education and experience coupled with a commitment to service makes it uniquely qualified to ensure that clients are compliant with the myriad of tax laws.

Nienow & Tierney's customer base includes: S-Corporations, Non-Profit Organizations, Trust and Estates, Small Business Owners and Partnerships.

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	<p>Representatives report the accounting industry has changed in the last few months with the introduction of new regulations and tax reform. These changes have a significant impact on the accounting industry, thus affecting Nienow & Tierney's standard accounting processes. As a result of these changes, employees require a substantial amount of training hours to stay current and compliant with the new regulations.</p> <p>In addition to the need for commercial skills, training will also be provided to trainees on computer technology. The firm purchased in 2017 a new trial balance software, Workpaper CS, used to manage work papers and source documents in preparing taxes. This will be rolled out to all employees and will require extensive training throughout the year.</p> <p>Respectively, Nienow & Tierney requests a two-year contract to allow sufficient time for the necessary training to be completed within the term of agreement. The average of 55 hours has been designated for all trainees (Group 1 and 2). During the 21 month training period trainees will be provided with training during non-peak tax season. Typically, after tax season, employees usually have weekly training on software updates. Training will not be conducted for Continuing Education for the purpose of obtaining and maintaining a professional license.</p> <p>Finally, Steve Tierney & Paul Nienow the owners, Managers and Senior Accountants and Senior Consultant will participate in training focused on: Leadership, Teambuilding, Communication, Project Management, Tax Updates, Estate Trusts, Fraud, and</p>
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PROPOSED TRAINING PROJECT DETAILS

	Corporate Tax techniques. ETP training will strengthen Nienow & Tierney's customer base to remain competitive in the accounting industry.
Training Infrastructure and Administrative Plan	<p>The training project will be overseen by Firm Administrator who will be responsible for educating staff and trainers on the process, providing information to enroll trainees, and track data on training hours along with meeting with ETP staff. Nienow & Tierney will also utilize Welsh Advisors, an administrative subcontractor, to assist with the upload and data entry into ETP's Online systems.</p> <p>Training will be delivered by in-house trainers and vendors to be determined after approval of project.</p>
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.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training will be provided to all staff in Business, Commercial and Computer Skills as identified in Attachment 1.	

4. Additional Company or Training Project Details

Provided here is additional information relative to the proposed Training Project.

Retrainee Job Creation

Due to the need for the Company to hire skilled workers and growth, the Company's is expanding existing business capacity by adding a newly-hired employee to existing job functions. Nienow & Tierney plans to hire 1 Accountant to be included in the Job Creation Group 2. This trainee will be placed into a net new job.

4.1 Program Waivers

No Waivers have been applied to this proposed project.

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Welsh Advisors, Inc.	Anaheim	\$ 1,185.80
Administrative	Welsh Advisors, Inc.	Anaheim	13% of funding earned
Training	None selected to date	N/A	N/A

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.

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication Skills
	Customer Service
	Leadership Skills
	Marketing Skills
	Teambuilding Skills
Commercial Skills (Standard)	Accounting & Auditing Updates
	Best Practices: Tax Strategies
	Best Practices: Audit Techniques
	Client Management Skills
	Corporate Tax Techniques
	Employee Retirement Income Security Act and Employer Benefit Plans
	Estates and Trusts Procedures
	Fraud (detection, analysis, review)
	Professional Networking Management
	Project Management
	Tax Updates
	Technical Updates/Procedures (changes to accounting and auditing procedures)
Computer Skills (Standard)	Accounting Software
	Adobe Office Suite
	Checkpoint Research
	Microsoft Office (Intermediate)
	Office Tools Professional
	Quickbooks
	Workpaper CS

DELEGATION ORDER



**Training Proposal for:
One Week Bath, Inc.**

Small Business

ET19-0122

Approval Date: June 5, 2018

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

CONTRACTOR

- Type of Industry: Construction
 - Number of Full-Time Employees
 - California: 44
 - Worldwide: 44
 - Number to be trained: 44
 - Out-of-State Competition: No OSC
 - Special Employment Training (SET): ☒ Yes ☐ No
 - High Unemployment Area (HUA): ☐ Yes ☒ No
 - Turnover Rate: 18%
 - Repeat Contractor: ☐ Yes ☒ No
- Priority Industry: ☒ Yes ☐ No
- Owner ☒ Yes ☐ No

FUNDING

- Requested Amount: \$58,760
- In-Kind Contribution: \$68,355

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, HazMat, PL-Commercial Skills	44	8-60	0	\$910	\$22.77
				Weighted Avg: 35			
2	Retrainee SB <100 Job Creation Initiative SET	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, HazMat, PL-Commercial Skills	18	8-60	0	\$1,040	*\$14.62
				Weighted Avg: 40			

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

- Reimbursement Rate: Job #'s 1 & 2: \$26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Installers, Administration Staff, Sales Staff, Warehouse Staff, Supervisor/Manager, Owner
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #'s 1 & 2: \$2.50 per hour

SUBCONTRACTORS

- Development Services: One Week Bath retained Training Funding Source in Seal Beach to assist with development of this proposal for a flat fee of \$2,900.
- Administrative Services: Training Funding Source will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.
- Training Vendors: SeeMetrics of Thousand Oaks will provide training on Performance/Risk Management. Open Book Coaching of Sausalito will provide Business Skills training (Leadership and Coaching). Other trainers will be identified for ETP record-keeping purposes, as they are retained.

OVERVIEW

Founded in 2000, One Week Bath, Inc. (One Week Bath) (www.oneweekbath.com) is an independent residential bathroom remodeling company. The Company is located in Van Nuys. The Company's primary customer base are residential homeowners throughout Southern California. One Week Bath offers an all-inclusive, high quality, design-build process completing the remodel within one week. This will be the Company's first ETP Agreement.

Training Plan

In the last few years, One Week Bath has seen a shift in the workforce, with greater challenges to acquire workers with the skill sets to complete high quality renovations that meet customer expectations. To remain competitive, the Company will provide training to increase worker skills to provide high quality renovations on complex construction projects. Training will increase staff knowledge and skill sets, and increase company sales and efficiencies.

A substantial amount of cross training will be provided to introduce Installers to multiple trades in construction. Employees of One Week Bath are familiar with various trades, but are not able to perform work at a level needed. As a result, One Week Bath must reassign tasks to different workers in order to meet the renovation deadline (one week). Training will allow installers to master additional skills such as tiling, painting, and drywall installation. Training will increase staff skills in prepping, equipment operation, and safety. Staff that are considered experts on particular subject matter have been identified as "black belt" trainers that will train fellow staff members who will benefit from various training on trade specialties.

Training will also include a financial literacy and sales program to increase employee knowledge in marketing and business skills, and improve marketing strategies and customer negotiations. In addition, training will enable staff to attract new clientele and secure new renovation projects.

Training Plan

Training will be delivered by in-house instructors and training vendors (see page 5).

Business Skills: Training will be offered to all occupations to improve employee communication, customer service, and management skills. Curriculum topics will provide staff new methods and tools that will increase efficiency.

Commercial Skills: Training will be offered to Production Staff and Field Technicians to increase worker skills in construction/renovation. Course topics will include Framing, Plumbing, Power Tool Use and Guarding, and Site Logistics.

Computer Skills: Training will be offered to all occupations to increase worker skills in computer software usage. Training topics will include Time Tracking and Microsoft Office.

Continuous Improvement: Training will be offered to all occupations to increase employee team building and process improvement. Courses will increase staff's ability to improve company procedures and implement better systems.

Hazardous Materials: Training will be provided to Installers to learn safety precautions and safe handling of hazardous materials. This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials.

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 is a methodology often used in the construction industry among businesses in renovation. Instructors will conduct PL training at company job sites for 30 new and incumbent employees. Trainees will demonstrate their ability to perform and master the following: tile laying, plumbing, electrical, framing, drywall installation, and painting. In addition, property protection and demolition will also be a requirement for PL training conducted on-site.

Installers will demonstrate to the instructors that they can perform each tasks following all steps in each assignment (tiling, framing, etc.). Instructors will monitor and ensure workers are utilizing proper techniques and procedures. Following training, instructors will make the final determination to pass employees as qualified to perform construction tasks independently.

PL training is estimated to take approximately 8 hours a day for 2 weeks to master each skill. One Week Bath is requesting a trainer-to-trainee ratio of 1:2. Although a majority of training delivered will have a ratio of 1:1, there will be small occasions that training will be delivered to two employees at one time. Training may be provided on particular construction functions such as tiling, fixture installation, and framing.

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.

One Week Bath will hire 18 new employees (Job Number 2). The Company is expanding existing business capacity by adding newly-hired employees to an existing job function. 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.

Newly hired Installers will receive Commercial Skills training to ensure workers can deliver high quality remodeling to meet customer needs. Training will also introduce staff to new skill sets in construction, increasing their ability to complete more than one task at a job-site. One Week Bath will provide sales training to newly hired Sales Representatives. Training will present new sales techniques and methods staff can utilize when engaging with the customer.

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.

➤ Training Infrastructure

The Office Manager will administer training. Designated staff will collect rosters, schedule training, and work with the hired third-party administrator to enroll, and perform data entry. Training will be provided by senior staff subject matter experts.

Frontline Managers

One Week Bath is requesting to include 1 Supervisor/Manager in this training proposal. This employee supervises but also works alongside installers to complete renovation jobs. This staff

member will spend more than 50% of their time performing frontline work duties. As such, they meet the Panel's definition of "frontline workers" and qualify for SET funding.

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

- Budget
- Coaching Skills
- Communication
- Conflict Management
- Customer Service
- Developing new Opportunities
- Leadership
- Performance Management Planning
- Product Knowledge
- Risk Management
- Schedule Coordination

COMMERCIAL SKILLS

- Drywall Installation
- Demolition
- Electrical
- Equipment and Operations
- Framing
- Job Cost
- Materials Handling and Storage
- OSHA 10 & 30
- Painting & Staining
- Plumbing
- Power Tool use and Guarding
- Prepping/Protecting Property
- Respiratory Protection
- Site Logistics
- Tile Installation
- Work zone traffic control

COMPUTER SKILLS

- ACT Customer Relationship
- GPS Software
- Microsoft Office
- QuickBooks
- RMS Software
- Time Tracking
- Website

CONTINUOUS IMPROVEMENT

- Process Improvement
- Problem Solving/Decision making
- Productivity Improvement
- Quality Systems and Procedures
- Team Building

HAZARDOUS MATERIALS

- Hazard communication
- Material Safety Data Sheet
- Toxic Substances

PL Hours

0 - 40 (ratio 1:2)

COMMERICAL SKILLS

- Equipment Operations
- Field Operational Procedures
- Site Logistics

<p>Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.</p>



**Retrainee - Job Creation
Training Proposal for:
Probe Information Services, Inc.**

Small Business

ET19-0111

Approval Date: June 11, 2018

ETP Regional Office: Sacramento

Analyst: K. Jones

CONTRACTOR

- Type of Industry: Services
- Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees
 - California: 79
 - Worldwide: 82
 - Number to be trained: 82
- Owner ☐ Yes ☒ No
- Competitors Outside CA
- Out-of-State Competition:
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 10%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: \$68,224
- In-Kind Contribution: \$111,501

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100	Business Skills, Computer Skills, Commercial Skills, Management Skills	72	8-60	0-6	\$832	\$16.80
				Weighted Avg: 32			
2	Retrainee SB <100 Job Creation Initiative	Business Skills, Computer Skills, Commercial Skills	10	8-60	0-6	\$832	*\$14.00
				Weighted Avg: 32			

*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
- County(ies): Sacramento
- Occupations to be Trained: Investigator, Manager, Analyst, Administrative Staff
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #'s 1 & 2: \$2.50 per hour

SUBCONTRACTORS

- Development Services: Sierra Consulting Services, Inc. of El Dorado Hills assisted with development services for a flat fee of \$6,400.
- Administrative Services: Sierra Consulting Services will also perform administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1992 and headquartered in Citrus Heights, Probe Information Services, Inc. (PIS) (<https://www.probeinfo.com/>) provides investigation services to clients throughout Northern California. The firm offers surveillance, field investigations, database services, vendor coordination, and fraud analysis to their clients. PIS's core customer base includes government agencies, private employers, and the insurance industry's self-insured entities, carriers, and

third-party administrators. This will be PIS's first ETP Agreement. Training will take place at the company's Citrus Heights location.

Project Details

The Company's need for training driven by changes in technology and securing new contracts with government agencies. PIS has recently been awarded contracts with The County of San Diego, The City of San Jose, The County of Alameda and The City and County of San Francisco. These new contracts total one million dollars in new revenue and requires PIS to follow investigative requirements set by these government agencies to guarantee compliance. Trainees will receive training in Claimant Fraud, Discretion and Confidentiality, Evidence Handling and Field Investigations to ensure investigations are completed with the highest levels of ethics, integrity and client satisfaction.

Changes in technology and the use of social media platforms has changed the way investigative firms complete background checks. PIS will train staff on the use of databases for criminal and civil background checks. PIS also uses databases that collect information from social media platforms when completing specific types of investigations. Staff will receive training to ensure relevant information is gathered in a manner that is compliant with state and federal regulations.

In the past, Investigators have been trained in a one-on-one environment, typically by a supervisor. PIS recently designed a training plan for investigators that focuses on training in a group environment. This creates consistency in investigative practices and gives the trainees a chance to learn from different field experiences. The trainees will be grouped by experience and knowledge levels and will receive a customized training plan based on training needs.

Job Creation

PIS has recently contracted with two new insurance agencies to provide investigative services in Southern California. AIX Specialty Insurance and Pharmacists Mutual will generate \$4.5 million in new revenue for the Company and require PIS to hire new investigators to service that region. PIS has committed to hire 10 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

Class/lab, ELearning and Computer Based Training (CBT) will be provided by in-house experts and vendors as needed in the following:

Business Skills: Training will be provided to all occupations. Training will promote administrative efficiency and provide staff with the knowledge and skills to run the business effectively. Training topics include: Business Communication, Creative Marketing, Business Writing, Forecasting and Planning, Negotiating, and Project Management and Methodology.

Computer Skills: Training will be provided to all occupations to improve internal processes and increase employee's proficiency in various business software systems. Training topics include: Crystal Reports, Investigation Video Editor, and Foxit – Adobe and will allow trainees to research and report investigative findings.

Commercial Skills: Training will be provided to all occupations to ensure that PIS remains competitive in its industry. These skills will enable employees to improve quality and

consistency in investigation processes. Training includes: Field Investigations, Investigative Metrics, Statutory Timeframes, Document Preparation, Analysis, and Requests for Information.

Management Skills: Training will be provided to Managers. Training will focus on enhancing skills to create a productive work atmosphere to motivate, positively lead, and coach staff. Training topics include: Administration, Coaching Procedures, Team Building, and Effective Meetings for Leaders.

Computer Based Training (CBT)

CBT will support Class/Lab and ELearning training. Trainees in Job Numbers 1 and 2 will receive no more than 6 hours of CBT training. Courses include: Advanced Customer Service Techniques, Business Writing and Conflict Resolution.

Training Infrastructure

The President of PIS developed the training plan that will be carried out by the Training Coordinator under this Agreement. The Training Coordinator will coordinate and schedule training, and ensure record-keeping compliance. Additionally, the Company has hired a third party administrator, Sierra Consulting Services, Inc., to assist with ETP administrative requirements. PIS has a process in place to ensure all administrative duties are handled properly and the Training Coordinator is aware of their responsibilities.

RECOMMENDATION

Staff recommends approval of this proposal.

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

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting
- Business Communication
- Business Fundamentals
- Business Writing
- Behavior Style Strategies
- Client Interaction
- Conflict Resolution
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Communication Styles
- Company Culture Development
- Dealing with Difficult People
- Develop Employee Accountability
- Decision Making
- Employee Engagement
- Essential Skills for New Supervisor
- Forecasting and Planning
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques & Strategy
- Negotiating
- Organizational Structure Development
- Planning and Organization
- Project Management and Methodology
- Retaining Customers
- Relationship Building
- Strategic Planning
- Time Management

COMMERCIAL SKILLS

- Analysis
- Background Investigations
- Case Handling Techniques
- Claimant Fraud
- Client Invoice Reporting
- Conflict Resolution
- Discretion and Confidentiality
- Document Preparation
- Equipment Operation

- Evidence Handling
- Field Investigations
- Field Reports
- Insurance Fraud
- Insurance Terminology
- Inventory Management
- Investigative Industry Standards & Practices
- Investigative Metrics
- Investigative Reports
- Investigative Techniques
- Licensing & Reporting
- Litigation
- Medical Canvass
- Medical Terminology
- Objectives Reporting
- Pre-Employment Background Screening
- Premium Fraud
- Provider Fraud
- Requests for Information
- Screening
- Statutory Timeframes
- Subrogation
- Surveillance
- Troubleshoot Equipment
- Training-the-Trainer
- Workers' Compensation

COMPUTER SKILLS

- Applicant Tracking System (ATS) Technologies
- Crystal Reports
- FastTrack - CRM
- Foxit - Adobe
- Human Resources Information Software (HRIS)
- Microsoft Office (Intermediate/Advanced)
- Location & Asset Database
- Microsoft Publisher (Intermediate/Advanced)
- Quickbooks
- Transcription Software
- Investigation Video Editor

MANAGEMENT SKILLS (management trainees only)

- Administration
- Coaching Procedures
- Effective Meetings for Leaders
- Increasing Motivation
- Teambuilding

CBT Hours

0-6 Trainees may receive any of the following:

BUSINESS SKILLS

- Advanced Customer Service Techniques – 2 Hours
- Business Writing – 2 Hours
- Conflict Resolution – 2 Hours

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER**Training Proposal for:****Raypak, Inc.****Agreement Number: ET19-0126****Approval Date:** June 11, 2018**ETP Regional Office:** North Hollywood**Analyst:** M. Reeves**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Ventura	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 410	U.S.: 2,600	Worldwide: 6,000
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	20%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$49,392		\$0	\$0		\$49,392

In-Kind Contribution:	100% of Total ETP Funding Required	\$57,624
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Imp., Literacy Skills, Mgmt. Skills, Mfg. Skills, PL-Mfg. Skills	196	8-200	0	\$252	\$16.70
				Weighted Avg: 14			

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 \$1.37 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Production Staff		120
Office/Support Staff		36
Supervisor		25
Manager		15

INTRODUCTION

Founded in 1946 and located in Oxnard, Raypak, Inc. (Raypak) is a manufacturer of pool heating equipment and copper-fin boilers. The Company's products include residential and commercial boilers, hydronic boilers, pool and spa heat pumps, storage tanks, and water heaters. Raypak customers include distributors, contractors, design/build consultants, and homeowners.

PROJECT DETAILS

Raypak is in the process of upgrading its existing facility by adding a new Innovation and Learning Center/Lab. This business expansion will enhance the Company's ability to bring new ideas and products to the market. In addition, the Company has invested in new technology such as Robotic Automation equipment and Tube Processing machinery designed to increase productivity.

As Raypak continues taking steps to increase its business capacity and generate sales, the Company must also develop the internal technical expertise and leadership team that will guide Raypak into the future. Employees must be equipped with the knowledge and skills to adapt rapidly to changes in demand. The proposed training is intended to help Raypak upgrade the skills of its existing workforce and implement technology improvements to enhance productivity, customer service, and operational efficiency.

Training Plan

Business Skills: Training will be offered to all occupations. Training will focus on customer service excellence at all levels of the organization.

Computer Skills: Training will be offered to all occupations. Training will cover Microsoft Office upgrades and recent changes to Raypak's human resource information system. Production Staff will also learn the most effective uses of machining software.

Continuous Improvement: Training will be offered to all occupations. This training will help to ensure that all employees remain current on all aspects of process management, testing equipment, and quality assurance.

Literacy Skills: Training will be offered to Production 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.

Management Skills: Training will be offered to Supervisors and Managers. Trainees will learn effective leadership skills to promote teamwork, confidence, and initiative among frontline workers.

Manufacturing Skills: Training will be offered to Production Staff, Supervisors, and Managers. These training modules will cover various production skills associated with equipment operation and Lean Manufacturing. This training will improve product quality, reduce errors/waste, and enhance the Company's overall production process.

Productive Laboratory

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

The Company indicates that PL training provides the suitable environment for employees to comprehend Raypak's detailed production processes. PL training will be provided to approximately 80 Production Staff trainees. PL training hours will range between 0 to 40 hours per trainee, depending on experience, occupation and learning capacity. This training will help workers achieve the competencies needed to perform their jobs with the highest level of safety and efficiency.

PL training will focus on production skills and equipment operation. Training will involve the use of items such as welding equipment, CNC machinery, power tools, punch press machines, press brakes, and testing devices. Training will be provided by qualified instructors with knowledge and expertise in Raypak's manufacturing processes. The trainer-to-trainee ratio will be 1:1.

Prior Performance

This will be Raypak's second ETP Agreement, its second in the last five years. This proposal is an extension of the training framework introduced in the previous contract. The Curriculum includes several new Manufacturing Skills topics in response to various changes in production processes.

This proposal includes employees who may have participated in the previous contract, as well as reoccurring Curriculum topics. However, the Company has confirmed that the subject matter has been revised to address evolving business needs, so there will be no duplication of training.

Commitment to Training

Raypak spends approximately \$10,000 annually on training at its California facility. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Raypak's Human Resources Manager will oversee project administration and the Company's Human Resources Generalist will assist with scheduling, delivery, and tracking of training. Training will take place at Raypak's Oxnard location, and 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 Raypak under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0440	Oxnard	04/27/15 – 04/26/17	\$54,950	\$41,361 (75%)

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

- Customer Service
- Value Added Sales

COMPUTER SKILLS

- Microsoft Office (Advanced/Intermediate)
- HRIS (Human Resources Information System Self Service)
- Computer-Aided Design/Manufacturing (CAD/CAM)

CONTINUOUS IMPROVEMENT

- ISO Internal Auditor
- Engineering Lab Equipment

LITERACY SKILLS

- Vocational English as a Second Language (VESL)
- Basic Math
- Job-Related Reading, Writing, Comprehension

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Emotional Intelligence
- Performance Management
- Leadership

MANUFACTURING SKILLS

- New Product Technical Training (Pool)
- New Product Technical Training (Commercial)
- Lock-Out/Tag Out
- Confined Space Entry
- Lean Manufacturing (5S)
- CAD/CAM Training for Manufacturing Operations
- Blue Print Reading
- Forklift Operation
- Welding Process/ASME (American Society of Mechanical Engineers)
- Robotic Automation Training
- Tube Processing Machine Training

Productive Lab Hours

0-40

MANUFACTURING SKILLS (Ratio 1:1)

- Assembler 3 Cross-Training
- Assembler 4 Cross-Training
- Brazing and Welding
- Press Brake Set-Up
- Punch Press Set-Up

- Spot-welding
- AMSE Testing
- CNC Mill
- Tester 1
- Tester 2
- Punch Press Operator
- Press Brake Operator
- Powder Painter
- Punch Die Operator
- Material Handler
- Final Assembly
- Hood Assembler
- Shipping Operations
- Warranty Replacement Helper
- Stockroom Attendant Procedures

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: Richmond Wholesale Meat Co.

Small Business

ET18-0239

Approval Date: May 18, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: C. Hoover

CONTRACTOR

- Type of Industry:
 - Wholesale Trade
 - Goods Movement
 - Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
 - California: 48
 - Worldwide: 48
 - Number to be trained: 53
 - Owner ☐ Yes ☒ No
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 15%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: \$49,764
- In-Kind Contribution: \$87,450

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, HazMat	46	8-60	0	\$884	\$18.22
				Weighted Avg: 34			
2	Retrainee SB <100 Priority Rate Job Creation	Business Skills, Comm'l. Skills, Computer Skills, HazMat	7	8-60	0	\$1,300	\$15.18
				Weighted Avg: 50			

- Reimbursement Rate: Job #'s 1 & 2: \$26 SB Priority
- County(ies): Contra Costa
- Occupations to be Trained: Operations Staff, Sales Staff, Administration Staff, Frontline Supervisor, Manager
- Union Representation: ☐ Yes
☒ No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Propel Consulting Group (PCG) in El Dorado Hills assisted with development for a flat fee of \$2,500.
- Administrative Services: PCG will also assist with administrative services for an amount not to exceed 13% of payment earned.
- Training Vendors: New Horizons Learning Group, Sacramento, will deliver Business and Computer Skills training.

OVERVIEW

Founded in 1959, Richmond Wholesale Meat Co. (RW) (www.richmondwholesale.com) distributes frozen, chilled and dry food products. Its products include custom processed beef steaks, pork, sausages, ice cream, dairy, chicken, bakery goods, salad dressings, juices, frozen fruit and vegetables. The Company provides goods and services to wholesalers, hotels, restaurants, manufacturers and grocery stores. RW's customer base includes US Foods, Safeway, Savemart, C&S Wholesale, Tony's Fine Foods, Palau Pacific Resorts (Philippines) and Sipac (South Pacific). ETP-funded training will be delivered at the Company's only California location in Richmond.

With a significant amount of RW's business being overseas, new customer requirements and products are driving the Company's need for training. New customer products, such as new cuts of beef, pork or chicken, require different processing, treatment and packaging. New labeling, reporting, handling and shipping requirements (which vary by country) result in its staff needing to be up to date on changes.

RW has expanded its cold-storage footprint, adding enough capacity to operate this function in-house rather than leasing space from another entity. The Company is also expanding into new products like paper goods, foam trays and dairy products. This demands new product sales skills and training to meet new government requirements. In addition, RW is purchasing new equipment including transporters (\$13,000 each) and a wrapping machine (\$17,000) to help address the increase in its business capacity.

RW is expanding its private label lines and stock keeping units (SKU). The Company currently has 229 private label SKUs with a goal of adding another 15%. These new products will require training on new rules and documentation requirements.

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.

RW has committed to hiring seven 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.

The Company is expanding its existing business capacity with new products, new equipment and cold-storage expansion. RW continues to grow its revenue and customer contracts with a goal of a 5% increase in fiscal year 2018 and an additional 5% growth by 2019.

Training Plan

The following training will be delivered in Class/Lab and E-Learning:

Business Skills: Training will be offered to all occupations. Operations Staff will receive communication training to streamline product delivery processes. Administration and Sales Staff will receive training in customer communications, presentations, sales, customer service, financial analysis and reporting. Frontline Supervisors and Managers will receive training to effectively communicate management's goals to staff members and to become better leaders of the business.

Commercial Skills: Training will be offered to Operations Staff and Frontline Supervisors. Training includes equipment operations, inventory management, electrical and refrigeration. This training will allow the Operations' team to efficiently monitor and account for RW's products, while handling its products in the most efficient and safe manner.

Computer Skills: Training will be offered to all occupations. Operations Staff will receive training to help plan production and control inventory. Administration Staff will train in the Company's upgraded operating and reporting systems, and utilizing new social media platforms to advertise. RW's Administrative Staff will also receive network training to manage new systems and IT infrastructure. Sales Staff will receive training in presentation preparation and financial reporting. Frontline Supervisors and Managers will train in reporting tools when

tracking data, identifying problem areas and reporting to ownership as a new materials requirements planning system and upgraded MS Office products are being launched.

Hazardous Materials: Training will be offered to Operations Staff and Frontline Supervisors to better handle and disposal of hazardous materials.

Training Infrastructure

Chief Operating Officer and the Senior Project Manager, Operations will oversee the project. Eight company Directors will ensure that each department delivers required ETP training and rosters are properly completed. Rosters will then be provided to the third-party administrator, PCG, for entry, upload, invoicing, tracking and reporting. The Senior Project Manager, Operations will be the dedicated administrator and will supply PCG with employee data for enrollment tracking purposes. 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/E-Learning Hours**

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- + Business Performance
- + Financial Reporting
- + Communications
- + Budgeting
- + Presentations
- + General Accounting
- + Sales Skills
- + Project Management
- + Customer Service
- + Conflict Management
- + Problem Solving & Decision Making
- + Leadership Skills
- + Teambuilding




COMMERCIAL SKILLS

- + Maintenance
- + Electrical
- + Carpentry
- + Plumbing
- + Welding
- + Refrigeration
- + Inventory Management
- + Manufacturing Equipment Operations
- + Hostler Skills
- + Forklift Operations
- + Transporter Operations
- + Food Safety Skills
- + Good Manufacturing Practices
- + Plant Operations

COMPUTER SKILLS

- + MS Office
- + MS Windows
- + Materials Requirements Planning
- + Network Security
- + Network Engineering
- + Photoshop
- + Basic Image Graphics
- + Advanced Programming
- + Social Media/Digital Marketing
- + Export Verification Systems

HAZARDOUS MATERIALS

-  Handling Hazardous Materials
-  Disposal Hazardous Materials
-  Hazardous Materials Communications

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.



TRAINING PROPOSAL FOR
SGS US West Coast, LLC
17-0917

Panel Meeting Date: 06/22/2018
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.

TOTAL ETP FUNDING: \$49,140.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$49,140.00	N/A	\$0.00	\$65,600.00

APPLICANT PROFILE

Company Summary	Founded in 1945 and headquartered in Long Beach, SGS US West Coast, LLC (SGS) is an underwater marine construction company that offers maintenance and repair, in-water surveys, propeller polishing and in-water hull cleaning, to complex class-approved permanent ship repairs.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 45	US: 147	World Wide: 147
Turnover Rate (Applicant)	9.00 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	Pile Drivers, Bridge, Dock and Wharf Builders, Local 2375		

TRAINING PROFILE

Training Objective(s)	Training will improve overall job skills and will focus on upgrading diving standards and improving construction processes.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	45	\$26.00	42	\$1,092	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

SGS is an underwater marine construction company that offers maintenance and repair, in-water surveys, propeller polishing and in-water hull cleaning, to complex class-approved permanent ship repairs (propellers, rudders, thrusters, shell plates, seals). Its customers include private, commercial, and military ship operators; general cargo shipping; offshore oil ships and the cruise-line industry.

2. Current Training Project Details

Purpose of Training

This is SGS third ETP Agreement, and the second project in five years.

The underwater marine construction industry is becoming more competitive and customers are searching for the most economical repair services. To respond to this demand, the Company must cross-train its divers in all areas of diving. Divers need to enhance their skills in construction techniques to build underwater infrastructure construction projects including bridges, pipelines and harbor construction. This type of training is very important in this industry, as SGS strives to improve all aspects of the Company to stand above their competitors.

Training will focus on upgrading diving standards and improving construction processes. The Company will also improve customer service and streamline operational skills. SGS will also implement new underwater welding techniques, Customer Relation Management software and new factory construction and repairs procedures, which is different from the previous Agreement, which focused on Job Creation.

Business Skills will include Interpersonal Communication, Project Management and Work Procedures.

Commercial Skills will include Dock Construction and Maintenance, Troubleshooting and Underwater Operations and Procedures.

Computer Skills will include Customer Relations Management (CRM), Advanced Adobe and Microsoft Office to enhance project management skills.

Continuous Improvement will include Process Improvement and Teambuilding. Training will make trainees more versatile and valuable to the Company and its customers.

PROPOSED TRAINING PROJECT DETAILS

	The proposed curriculum consists of new courses and some topics repeated from the previous agreements, which were not fully covered in the previous project. There will be no duplication of training.
Training Infrastructure and Administrative Plan	<p>SGS spends an estimated \$65,000 annually in training at its 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.</p> <p>The Owner and H.R. Manager will 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.</p> <p>Training will take place in the Company's location in Long Beach. In-house experts will provide training and vendors as needed.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

A summary of the curriculum is provided below. See *Attachment 2 - Training Delivery and Curriculum Listing* for more details.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training in Business Skills, Computer Skills and Continuous Improvement.	
Divers and Supervisors/Managers will also receive training in Commercial Skills.	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor(s).

PROPOSED TRAINING PROJECT DETAILS

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$2,900.00
Administrative	Training Funding Source	Seal Beach	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET15-0412	Long Beach	6/1715 -6/16/17	\$36,340	\$36,340	100%

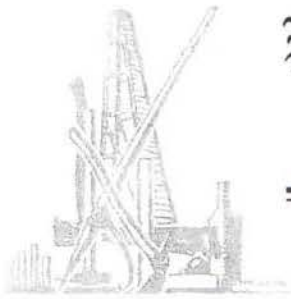
4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional details on the training population, curriculum, and associated program characteristics.

Attachment 2 - Training Delivery and Curriculum Listing

Provided below are details on the types of training planned for this proposed Training Project.

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Customer Relations
	Interpersonal Communication
	Project Management
	Work Procedures
Commercial Skills (Standard)	Dock Construction/Maintenance
	Equipment Operations
	Hull Cleaning Processes/Procedures
	Report Writing
	Ship Construction/Inspection/Maintenance
	Troubleshooting
	Underwater Cleaning & Amp; Arc Gouging
	Underwater Operations/Procedures
Computer Skills (Standard)	Adobe
	Customer Relation (CRM)
	Microsoft Office/Windows
Continuous Improvement Skills	Process Improvement
	Teambuilding



Pile Drivers, Bridge, Dock and Wharf Builders

Local Union 2375

Affiliated with
United Brotherhood of Carpenters & Joiners of America

Office: 728 Lagoon Avenue • Wilmington, California 90744-5635
Telephone: (310) 830-5300 FAX: (310) 830-2375

April 20, 2018

Executive Director
The Employment Training Panel
1100 J Street
Fourth Floor
Sacramento, CA 95814

Union Support for ETP Funding

Dear Executive Director;

This letter is to confirm support by Pile Drivers Local Union 2375 for SGS US West Coast, LLC's proposed training to be submitted to Employment Training Panel.

Sincerely

JOHN SCHAFER
Business Manager
Pile Drivers Local Union 2375

DELEGATION ORDER



**Retrainee - Job Creation
Training Proposal for:**

Timothy K. Gaspar Insurance Services, Inc.

Small Business

ET19-0125

Approval Date: June 11, 2018

ETP Regional Office: North Hollywood

Analyst: L. Vuong

CONTRACTOR

- Type of Industry: Insurance Services
Priority Industry: ☐ Yes ☒ No
- Number of Full-Time Employees
California: 40
Worldwide: 44
Number to be trained: 40
Owner ☒ Yes ☐ No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 3%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: \$39,600
- In-Kind Contribution: \$36,720

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100	Business Skills, Commercial Skills, Computer Skills, Continuous Impr.	35	8-60	0	\$990	\$17.54
				Weighted Avg: 45			
2	Retrainee SB <100 Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Impr.	5	8-60	0	\$990	\$14.62
				Weighted Avg: 45			

- Reimbursement Rate: Job #'s 1 & 2: \$23 SB Non-Priority
- County(ies): Los Angeles
- Occupations to be Trained: Inside Sales Staff, Outside Sales Staff, Customer Service Staff, Management Staff, Owner, IT Staff, Commercial Agent, Claim Agent
- Union Representation: ☐ Yes
☒ No
- Health Benefits: Job #'s 1 & 2: \$2.50 per hour

SUBCONTRACTORS

- Development Services: Judith's Training Services (JTS) in Los Angeles, assisted with development for a flat fee of \$4,000.00.
- Administrative Services: JTS will also perform administrative services for the amount not to exceed 10% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2007 and located in Woodland Hills, Timothy K. Gaspar Insurance Services, Inc. (Timothy Gaspar) provides automobile, home, workers compensation and health insurance coverage for individuals and businesses. Timothy Gaspar began its business with three staff members and has since grown to more than 40 employees, including an office in Cherry Hill, NJ. Major customers include Menchie's Frozen Yogurt, Medici Neapolitan Pizza Company, Stone Fire Grill and several clothing manufacturers and food trucks.

Need for Training

Timothy Gaspar must keep up with insurance industry requirements, technology and customer demand in a constantly changing environment to remain competitive. Technology is advancing at a rapid pace and new systems are constantly being introduced into the marketplace. In addition, customers are continually expecting better and faster services, products at a lower costs and a more knowledgeable workforce.

The Company is currently transitioning to a cloud based desktop that allows staff to work remotely by using cell phones, laptops or tablets to remotely access the Company's systems. In addition, the Company is implementing a new software system, PL Rating, which includes quoting platform and storing client information, expanding commercial line to more businesses and enhance processes to improve customers' services. These improvements will assist in meeting the Company's current market needs and customers' demands. Going forward, the Company will focus on updating, developing and creating better products and services to remain competitive, attract new customers and promote continued growth. Improved technology systems and highly trained staff will drive Timothy Gaspar to meet these demands.

The Company requests a two-year term to the Agreement. The additional 12 months will enable Timothy Gaspar to handle workload, business demands and customer priorities. This increased flexibility will support planning and scheduling, and assist the Company in managing any customer service impacts due to increased service demands.

Training Plan

This will be Timothy Gaspar's second ETP Agreement, its second in the last five years. The first project focused on workers' job skills and business practices. For this proposal, the Company intends to improve and support new technologies and computer skills, product line and upgrade worker job skills to support the Company's growth. Training will enhance trainee job security, assist to upgrade worker job skills to become proficient, competent, increase services, keep up with insurance requirements, providing employees the necessary tools to be successful in their jobs and contribute to the Company's success.

With the success of its current ETP contract, Timothy Gaspar has experienced a 15% growth in business and an increase in its workforce from 30 to 40 employees in California. The Company anticipates additional growth of 30% and plans to hire approximately 8 additional new employees in California over the next two years. Therefore, the Company wishes to continue training its workforce to support its objectives and further strengthen the business and its success. Some courses may be repeated from prior curriculum; however, trainees will not receive duplicate training. Training is scheduled to begin upon approval; and will be delivered on-site by in-house staff and vendors to be determined later.

Classroom/Lab and Videoconference training will be delivered to all occupation as follows:

Business Skills – This training will be offered to all occupations. Trainees will gain additional knowledge and new skill sets in management systems, quoting platform training, product knowledge, strategic planning and customers' needs. Training in these area will provide workers the necessary skills to enhance customers' services, gain the continued loyalty of customers, and generate new businesses.

Commercial Skills – This training will be offered to all occupations. Training will focus on insurance industry guidelines, rules and standards, procedures, terminology, comprehension and customer requirements.

Computer Skills – This training will be offered to all occupations to utilize the Company's hardware and software programs as well as quoting platform and operation systems to better serve customers.

Continuous Improvement – This training will be offered to all occupations to promote new products, improve workflow, services and processes and become more efficient.

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. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. These trainees will be hired into "net new jobs" as a condition of contract.

In this proposal, Timothy Gaspar has committed to hiring 5 new employees, Sales Staff, IT Staff, Commercial Agent and Claim Agent (Job Number 2) to support the Company's business growth. Timothy Gaspar will train these new employees to accommodate various business needs and services. These employees will learn skill sets necessary to better serve customers, how to utilize sophisticated technology and internal computer systems and to have a better understanding of business operations.

➤ Training Infrastructure

Timothy Gaspar has designated a VP of Operation staff to oversee ETP training and administrative responsibilities. Administrative duties include scheduling, managing, delivering, and documenting training. The Company will also utilize a third party administrator for enrollment, data tracking and invoicing. (See Administrative Services below)

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0444	\$19,800	03/09/17 – 06/08/18	43	37	TBD

Based on ETP Systems, Timothy Gaspar have tracked 1,131 class/lab training hours. This is equivalent to \$24,882 (126% of the approved Agreement amount \$19,800) which is over the Agreement Amount. However, ETP will only pay Timothy Gaspar up to the ETP Total Agreement Amount of \$19,800 if the anticipated number to retain is verified during final fiscal closeout. To date, Timothy Gaspar has received

\$14,850 in payment. The Contractor projects final earnings of 100% based on training delivered and all training completed 03/06/2018.

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

8-60

Trainees may receive any of the following:

BUSINESS SKILLS:

- Product Knowledge
- Agency Management Systems
- Quota Platform Training
- Strategic Planning
- Evaluations/Monitoring
- Customer Service/Needs
- Leadership
- Decision making
- Team Building
- Administration
- Coaching Procedures
- Underwriting
- New Product Training

COMMERCIAL SKILLS:

- Banking/Insurance/Mortgage
- Rules and regulations

COMPUTER SKILLS:

- ZYWAVE
- Microsoft
- Network Management
- World Wide Web (WWW)
- PL Rating
- Hawksoft

CONTINUOUS IMPROVEMENT:

- Problem Solving
- Quality Concepts
- Total Quality Management
- Production Operations/workflow
- Process Improvement

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.