

# PANEL PACKET

March 2018





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# M e m o r a n d u m

To: Panel Members

Date March 23, 2018

From: Stewart Knox  
Executive Director

File: Panel Memo Doc.

Subject: **Directions to Meeting Site**

The Employment Training Panel will meet on FRIDAY, **March 23, 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 **11<sup>th</sup> St.**
- Turn Left on **11<sup>th</sup> 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 March 23, 2018

From: Stewart Knox  
Executive Director

File: Mtg. Site Memo

Subject: **Future Meeting Sites**

<p><b>March 23, 2018</b></p>	<p><b>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</b></p>
<p><b>April 2018</b></p>	<p><b>NO PANEL MEETING</b></p>
<p><b>May 24, 2018</b></p>	<p><b>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</b></p>
<p><b>June 22, 2018</b></p>	<p><b>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</b></p>



**STATE OF CALIFORNIA  
EMPLOYMENT TRAINING PANEL**

Sacramento City Hall  
New City Hall, 915 I Street  
Council Chambers, Room 1103  
Sacramento, CA 95814  
February 22, 2018  
(916) 327-5640

**PANEL MEMBERS**

Barry Broad  
Chair

Janice Roberts  
Vice-Chair

Gloria Bell  
Member

Will Koch  
*Ex-Officio* Member

Gretchen Newsom  
Member

Jeff Robinette  
Member

Sam Rodriguez  
Member

Ali Tweini  
Member

**Executive Staff**

Stewart Knox  
Executive Director

Michael A. Cable  
Legal Counsel





**STATE OF CALIFORNIA**  
**EMPLOYMENT TRAINING PANEL**  
Sacramento City Hall  
California Environmental Protection Agency  
1001 I Street, Sierra Hearing Room  
Sacramento, CA 95814  
February 22, 2018

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

Chairman Barry Broad called the meeting to order at 9:40 a.m.

**II. ROLL CALL**

Present

Barry Broad  
Will Koch  
Gretchen Newsom  
Janice Roberts  
Sam Rodriguez  
Jeff Robinette  
Ali Tweini

Absent

Gloria Bell

Executive Staff Present

Stewart Knox, Executive Director

Legal Counsel

Michael A. Cable

**III. OPENING STATEMENT**

Chairman Broad welcomed Panel Member Ali Tweini, Ex-Officio Member Will Koch, and legal Counsel Michael Cable to their first Panel Meeting.

**IV. AGENDA**

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

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

Motion carried, 7 - 0.

## **V. MINUTES**

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

**ACTION:** Ms. Newsom moved and Mr. Robinette seconded the motion that the Panel approve the Minutes from the January 24, 2018 meeting.

Motion carried, 7 - 0.

## **VI. REPORT OF LEGAL COUNSEL**

There was no report from Legal Counsel.

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

Stewart Knox, Executive Director, reported that today's Panel Meeting concerns projects totaling just over \$7.0M; approximately \$355K of which are Delegation Orders.

It was reported that the following people are here today 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 with \$2M approved through an Interagency Agreement; that ETP has had four ARFVTP proposals in the last few months totaling over \$900K, one of which was 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 \$7M in projects scheduled for today's Panel Meeting, ETP will have approximately \$19M 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 13 projects subject to Delegation Orders for today's Panel Meeting total just under \$355K.

It was reported, regarding 2017/18 total program funding to date, that approximately 367 projects have been submitted to the Panel, with a value of just over \$100M; and if all project proposals for today's Panel Meeting are funded today, that the Panel will have approved 337 projects, with a value of just under \$78M.

It was reported, regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at \$42M in demand; \$6.2M in allocation.

Multiple Employer Contract (MEC): requests are at \$6M in demand; \$3.8M in allocation. Small Businesses requests are at \$4.2M in demand; \$4.2M in allocation. Critical Proposals are at \$49K in demand; \$4.2M in allocations. Apprenticeship programs are at \$3.5M in demand; \$1.8M in allocation. Overall demand is approximately \$57M.

It was reported, the number of total projects in FY 2017/18 in the Regional Offices is 293; that the total number of projects currently in the Applications and Assessment Unit is 92; and that the number of total projects is 385.

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.

It was reported that ETP has an additional \$10M in allocations for appropriations from the Governor's office.

**VIII. LEGISLATIVE UPDATE**

A legislative update memorandum was provided to the Panel Members, and it was reported that there is a lot of information on Workforce Development and Cannabis issues.

**IX. MOTION TO ADOPT CONSENT CALENDAR PROJECTS**

Chairman Broad asked for a motion to adopt Consent Calendar Items #1 through #12.

All FAB Precision Sheetmetal, Inc.....	\$ 77,760
Applus RTD USA Services, Inc.....	\$149,688
Barracuda Networks, Inc.....	\$162,280
BHC Alhambra Hospital, Inc.....	\$201,798
C. Overaa & Co.....	\$ 99,396
Grossmont-Cuyamaca Community College District.....	\$ 90,000
Medcoast Medservices, Inc. dba Medcoast Ambulance Service.....	\$114,750
Moog, Inc.....	\$235,404
Nor Cal Beverage, Inc.....	\$150,270
PrimeCo.....	\$ 92,764
Terrakotta, Inc., dba Laguna Clay.....	\$ 83,200
WET.....	\$172,530

**ACTION:** Ms. Roberts moved and Ms. Newsom seconded the motion to approve the consent calendar for Items #1 through #12.

Motion carried, 7 – 0.

## **X. 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:** Ms. Roberts moved and Mr. Tweini seconded the approval to delegate authority to the Executive Director in event of a loss of quorum.

Motion carried, 7 - 0.

## **XI. REVIEW AND ACTION ON PROPOSALS**

### **Single Employers**

#### **Tab # 13 – Southern California Permanente Med Group**

Mr. Griffin presented a proposal on behalf of Southern California Permanente Medical Group (Kaiser) in the amount of \$749,520. Founded in 1945, Kaiser is a for-profit partnership and professional corporation of physicians responsible for providing and arranging medical care. Kaiser operates under three corporate umbrellas: Kaiser Foundation Health Plans (Nonprofit), Kaiser Foundation Hospitals (Nonprofit) and Kaiser Permanente Medical Groups (For-Profit). The medical groups formed The Permanente Federation to provide governance and police direction on a national level. Training proposed in this proposal will be limited to employees of the Southern California Permanente Medical Group. In California, the medical group general employs non-hospital personnel in the Kaiser system, with the exception of emergency room personnel who are employees of Kaiser. The group was previously registered as a Corporation; however, it has now been restructured into a General Partnership.

Mr. Griffin introduced Hazel Torres, Director- Regional Professional Development and Research Ambulatory Services and Steve Duscha.

During discussion, it was clarified, since Kaiser has had multiple contracts, that the employees to be trained under the current proposal are new and have not been trained under previous contracts.

It was suggested that there be no Substantial Contribution requirement for the current proposal; however, in the event Kaiser returns in the future with another proposal, it was indicated that a Substantial Contribution would be requested on any such future proposal made by Kaiser.

**ACTION:** Ms. Roberts moved and Ms. Newsom seconded the approval of the proposal for Southern California Permanente Medical Group in the amount of \$749,520.

Motion carried 7- 0.

#### **Tab # 14 – Foster Poultry Farms**

Ms. Nastari presented a Proposal for Foster Poultry Farms (Foster Farms), in the amount of \$683,550. Founded in 1939 and headquartered in Livingston, Foster Farms is the largest poultry producer in the Western United States. The Company's farms grow, process,

package, and ship its products to grocery stores and restaurants throughout the United States. Products include fresh chicken, chicken and turkey deli products, frozen appetizers, franks, and corn dogs. Training under this proposal will be delivered at the company's headquarters and seven other locations throughout California.

Ms. Nastari introduced Chris Carter – Vice President of Operations, Analuisa Reynoso – Human Resources Manager, Jeff Segars – Livingston Plant Manager, and Mike Jester, M.B.A. – Consultant with Strategic Business Solutions, LLC.

It was generally felt that Foster Farms has made improvements to its program, and that Foster Farms should be congratulated for the results of its last contract with ETP.

During discussion, it was clarified that approximately 15% of those to be trained under this proposal are veterans; and Foster Farms suggested it is extremely pro-veteran, employing approximately 2,500 veterans at Foster Farms.

**ACTION:** Ms. Roberts moved and Mr. Robinette seconded approval of the proposal for Foster Poultry Farms in the amount of \$683,550.

Motion carried, 7 - 0.

## **Multiple Employer Contracts**

### **Tab #15 – Employers Group Services Corporation**

Mr. Griffin presented a Proposal on behalf of Employers Group Services Corporation (Employers Group) in the amount of \$949,230. Founded in 1986, Employers Group is a non-profit trade association specializing in Human Resources (HR) Management. It offers several programs and services for its members including: telephone support and public workshops for HR professionals; consulting services on affirmative action planning and employee relations; surveys on compensation and benefits trends; and training in compliance, leadership, quality, productivity enhancement, and Lean Manufacturing. Employers Group is funded from membership dues and services fees. Members represent every industry (manufacturing, engineering, technology, transportation, and service-related businesses). Companies range in size from Fortune 500 companies to start-up ventures, with the majority of members having 10 to 200 employees.

Mr. Griffin introduced Jeffrey Hull, Sr. – Director of Talent Development.

During discussion, it was clarified that Employers Group performs 100% of the contract administration, including marketing.

**ACTION:** Ms. Newsom moved and Mr. Robinette seconded approval of the Proposal for Employers Group Service Corporation in the amount of \$949,230.

Motion carried, 7 - 0.

### **Tab #16 – Jewish Vocational Services of Los Angeles**

Mr. Griffin presented a Proposal for Jewish Vocational Services of Los Angeles (JVS), in the amount of \$949,830. Founded in 1931, JVS provides workforce development and career services to diverse populations through an internal service delivery network comprised of

workforce development, assessment and disability, business vocational training, multicultural, and welfare-to-work services. JVS meets the employment and training needs of public assistance recipients dislocated workers, unemployed and under-employed adults, mature workers, immigrants and refugees, high-risk youth (i.e. foster youth, probation youth, youth affiliated with gangs or in danger of gang affiliation), individuals with disabilities, and those with multiple economic and social barriers to employment. In addition, JVS identifies training needs, customizes training plans, and provides administrative support to employers in the manufacturing and healthcare industries.

Mr. Griffin introduced Jay Soloway – Director of Training and Education.

During discussion, JVS gave a general description of its Bank Works program, indicating that Bank Works is an 8-week program; that Bank Works provides technical and soft skills for people within the banking industry; that JVS has developed partnerships with 13 bank partners; and that the placement rate for Bank Works is close to 90%.

During discussion, it was clarified that JVS operates a program for veterans called Veteran's First, which is devoted to veterans and their spouses, and is a pool of persons from which JVS obtains participants for other programs such as Bank Works, Health Works, and Apartment Works.

During discussion, it was noted that JVS has a contract with the County of Los Angeles to deliver work source center services at the Bob Hope Patriotic Hall.

During discussion, it was clarified that JVS holds the trademark for Bank Works, Health Works, and Apartment Works.

**ACTION:** Mr. Rodriguez moved and Mr. Tweini seconded approval of the Proposal for Jewish Vocational Service of Los Angeles, in the amount of \$949,830.

Motion carried, 7 – 0.

## **Tab #17 – Santa Ana Chamber of Commerce**

Mr. Griffin presented a Proposal for Santa Ana Chamber of Commerce (SACC) in the amount of \$949,351. This is the tenth proposal for the SACC and the sixth in the past five years. Founded in 1889, the SACC brings together a broad representation of business, government, non-profit, and education entities that work together on its board of directors, councils, committees, and task forces, to identify and implement programs to improve the economy in Santa Ana and surrounding areas. Workforce Development is one area of focus for the SACC. Developing the local workforce involves linking skill-training programs to current employer demands.

Mr. Griffin introduced Marty Peterson, Vice President, Operations, A.K. Thakore, President of Saisoft, and A.K. Trikha, CEO of Lean QA.

During discussion, it was suggested that, although the pending proposal does not appear to violate a particular rule, the Broker Model does present important issues that appear inconsistent with ETP's custom and practice with regard to Multi-Employer Contracts.

During discussion, it was suggested that panel Members need to ensure an equitable playing field; and that there may be an issue as to whether an equitable playing field is compromised by at least multi-employer entities performing little to no work under the Broker Model.

During discussion, it was suggested that the Broker model presents various troublesome issues; that these troublesome issues should be considered by the Subcommittee; and that the Subcommittee should make recommendations to the Panel.

Chairman Broad made a motion to approve the pending proposal and to submit the issues regarding the Broker Model to Subcommittee.

During further discussion, concerns were raised regarding the following facts: that this is the second time this proposal was brought before the panel; that SACC was instructed to bring this proposal before the Panel today without inclusion of any Northern California entities; that, as instructed, the pending proposal does not include any Northern California entities provided in the initial proposal, which impacts the pending proposal by lowering the amount of trainees from the initial proposal by approximately 93 trainees (23%); and, although the pending proposal lowers the amount of trainees by approximately 23% from the initial proposal, that the pending proposal is for the same contract amount.

During further discussion, SACC was questioned about the above facts and why SACC did not lower the contract amount of the pending proposal since the amount of trainees in the pending proposal is approximately 23% lower than the initial proposal; and SACC responded by stating that lowering the amount of trainees did not impact the contract price because, even with the lowering of the amount of trainees in the pending proposal, there remains a sufficient number of trainees in order to substantiate the same contract price in the pending proposal.

During further discussion, it was suggested that the Panel may lower the contract amount of the pending proposal by 23% in order to commensurate with the pending proposal's lowering of trainees from the initial proposal.

Chairman Broad suggested he would agree to a friendly amendment to his motion that the contract amount of the pending proposal be reduced by 23% in order to reflect the smaller amount of trainees.

Ms. Newsom and Mr. Tweini suggested a friendly amendment to Chairman Broad's motion by lowering the contract amount by 23% in order to reflect the smaller amount of trainees.

Chairman Broad made an amended motion to approve the pending proposal, subject to a 23% decrease in the contract amount, and to submit the issues regarding the Broker Model to Subcommittee.

During further discussion, it was clarified that SACC has approximately 400-500 members, approximately 10 of which have participated in this training.

During further discussion, it was generally questioned as to whether ETP should consider imposing geographical limitations on proposals; whether there are public perception problems with a contractor not seen as representing the community it claims to represent; and how such geographical limitations would adversely affect various other entities submitting similar proposals.

During further discussion, it was generally felt that these geographical issues should be discussed at Subcommittee.

During further discussion, it was clarified that SACC has one Hispanic non-bilingual person who is aware of ETP and visits businesses, and that SACC has two Spanish bilingual staff members.

During further discussion, it was clarified that SACC contends that Saisoft and Lean QA provide a benefit to SACC and local businesses, but SACC does not know whether or not training by Saisoft and Lean QA has led to new SACC membership.

Chairman Broad restated his amended motion to approve the pending proposal, subject to a 23% decrease in the contract amount, which was calculated to be a revised contract amount of \$731K, and to submit the issues regarding the Broker Model to Subcommittee.

Mr. Tweini seconded the amended motion.

Chairman Broad requested a roll call vote on the amended motion.

Ms. Van Dyke called roll and received individual responses as follows:

Chairman Broad – I;  
Mr. Koch - I;  
Ms. Newsom - I;  
Ms. Roberts - Abstain  
Mr. Robinette - I;  
Mr. Rodriguez - I;  
Mr. Tweini - I.

**ACTION:** Amended motion to approve the pending proposal in the revised contract amount of \$731,000 and to submit the issues regarding the Broker Model to Subcommittee was polled and approved.

Motion was polled with 6 “I’s” and, 1 abstention.

## **AMENDMENTS**

### **Tab #18 – Laborers Training and Retraining Trust Fund of Southern California**

Mr. Griffin presented an *Amended* Proposal for the Laborers Training and Retraining Trust Fund of Southern California (SoCal Laborers), in the amount of \$706,731. Founded in 1970, the SoCal Laborers funds training for three separate Apprenticeship Programs, two of which will participate in this proposal: 1) Laborers Southern California JAC and 2) Southern California Laborers Landscape and Irrigation Fitters JAC. So Cal Laborers serves eight Southern California Locals (89, 220, 300, 585, 652, 783, 1309, and 1184) in 12 counties.

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

Panel Member Jeff Robinette recused himself from any discussion and left the room.

There were no questions from the panel.

**ACTION:** Ms. Roberts moved and Mr. Tweini seconded the approval of the Amended Proposal for Laborers Training and Retraining Trust Fund of Southern California in the amount of \$706,731.

Motion carried 6 – 0.

## **XII. PUBLIC COMMENT**

There was no public comment.



### **XIII. MEETING ADJOURNMENT**

Meeting adjourned at 10:31 a.m.

## Single Employer Contractor

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

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

These features apply to core program funding.

## Multiple Employer Contractor

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

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

### *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 \$50,000 or less, and (2) single proposals for \$50,000 or less.
- This procedure allows projects to be approved on a flow basis. This process recognizes the need for just-in-time training, and reduces or eliminates the need for a Consent Calendar.
- An ETP130 and Curriculum is prepared for each proposal. They are reviewed and approved after the Executive Director signs off. The effective date will be the date specified by the Field Analyst and if no date is specified, the earliest effective date of contract is the day after the project is approved by the Executive Director.
- A copy of approved Delegation Orders is included in each month's Panel Packet, for projects approved prior to the Panel meeting, as an information item.



**Retrainee - Job Creation  
Training Proposal for:  
Esplanade Builders, Inc.**

**Small Business**

**ET18-0181**

**Panel Meeting of:** March 23, 2018

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

**CONTRACTOR**

- Type of Industry: Construction
  
  - Number of Full-Time Employees
    - California: 86
    - Worldwide: 86
    - Number to be trained: 78
  
  - Out-of-State Competition: Competitors Outside CA
  - Special Employment Training (SET):  Yes  No
  - High Unemployment Area (HUA):  Yes  No
  - Turnover Rate: 15%
  - Repeat Contractor:  Yes  No
- Priority Industry:  Yes  No
- Owner  Yes  No

**FUNDING**

- Requested Amount: \$77,526
- In-Kind Contribution: \$112,320

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills; Commercial Skill; Computer Skills; Continuous Impr; OSHA10/30; PL-Comm Skills	69	8-60	0	\$1,014	\$17.50
				Weighted Avg: 39			
2	Retrainee Job Creation Initiative Priority Rate SB <100	Business Skills; Commercial Skill; Computer Skills; Continuous Impr; OSHA10/30; PL-Comm Skills	9	8-60	0	\$840	*\$14.58
				Weighted Avg: 42			

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

- Reimbursement Rate: Job #'s 1 and 2: \$26 SB Priority
- County(ies): Los Angeles, Orange
- Occupations to be Trained: Field Installer, Administrative Staff, Estimator, Project Engineer, Supervisor/Manager
- Union Representation:  Yes  
 No
- Health Benefits: Job #'s 1 and 2: \$2.50 per hour

**SUBCONTRACTORS**

- Development Services: Training Funding Source (TFS) in Seal Beach assisted in the development of this ETP proposal for a flat fee of \$4,900.
- Administrative Services: TFS will provide administration services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 2003, Esplanade Builders, Inc. (Esplanade) ([www.esplanadebuilders.com](http://www.esplanadebuilders.com)), is a full-service general contracting and project management firm. The Company specializes in construction and development of interior office tenant improvements, offices and creative spaces, medical and veterinary offices, retail and mixed-use spaces and commercial and industrial improvements. Services include framing, drywall, paint, acoustic ceiling, demolition, wall finishes and door and frame installation. The Company has two facilities in California, Torrance and Newport Beach. Both locations will participate in the ETP-funded training.

## Need for Training

Esplanade's need for training is based on its continued growth in the last five years and the increase in market demand for quality contractors. The Company will upgrade employee skills by providing them with high-technology construction procedures. The Company is implementing new software and developing new policies and procedures to maintain quality and service, standardize internal controls, and maximize efficiency to keep up with growth. Training will also improve field installation job skills, trade related skills, job cost management, upgraded administrative procedures and communication skills.

## Training Plan

**Business Skills:** This training will be offered to Administrative Staff, Estimator, Project Engineer, and Supervisors/Managers. Training will focus on customer satisfaction and process management. Trainees will learn to resolve complaints, identify problems, and propose solutions that exceed customer expectations. Training will allow the Company to be more efficient, productive, and profitable.

**Commercial Skills:** This training will be offered to Field Installers, Estimators, and Supervisors/Managers. Training will focus on operational procedures and various carpentry procedures. Training will reduce operating costs through error reduction.

**Computer Skills:** This training will be offered to all occupations. Trainees will learn to navigate and operate new software systems: SAGE accounting software, BlueBeam software, Microsoft 365, and Microsoft Office. Training will also include the proper usage of software screens and functions for maximum benefit.

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

## Certified Safety Training

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

## 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.

Esplanade has committed to hiring 9 new employees (Job Number 2). The Number of employees has grown from 52 to 86 in the past 2 years. Esplanade is still expanding, hiring new employees in anticipation of the Company's planned facility expansion in Orange County and job growth. 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.

## **Productive Laboratory**

Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. Esplanade will provide up to 30 hours of PL training to Field Installers, Project Engineers and Estimators on various processes and equipment used during construction. This training cannot be duplicated in a Class/Lab setting as the equipment is large and complex. Training will be conducted at construction sites with a 1:2 trainer-to-trainee ratio as some equipment will require two employees to operate.

## **Commitment to Training**

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

### ➤ Training Infrastructure

Esplanade is ready to start training upon approval of this proposal. The Chief Financial Officer and a Human Resources staff member will serve as project administrators and will work together with department heads to schedule and coordinate training. Esplanade also retained the services of Training Funding Source to assist with enrollment, data collection, and data entry into ETP systems. Training will be delivered by a combination of in-house staff and vendors.

## **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**

- How to read architectural documents
- Change order process management
- Coaching and communication skills
- Contracts management and compliance
- Conflict management
- Customer satisfaction
- Leadership
- Planning
- Performance management

**COMMERCIAL SKILLS**

- Change order process
- General construction/worksite procedures
- Equipment and tool operations
- Field operational procedures
- Installation procedures
- Continuous improvement: estimating
- Carpentry trades
- Site Logistics
- Walk through procedures
- Zero punch list

**COMPUTER SKILLS**

- BlueBeam
- Windows 10
- Microsoft 365
- Microsoft Project, Word, Excel, Outlook
- Adobe Acrobat
- SAGE ERP software
- Time tracking
- Digital job documents management

**CONTINUOUS IMPROVEMENT**

- Process and productivity improvement
- Team Building/ Problem Solving

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

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

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

**PL Hours**

0 – 30

**COMMERCIAL SKILLS** (ratio 1:2)

- Change order process
- General construction/worksite procedures
- Equipment and tool operations
- Field operational procedures
- Installation procedures
- Continuous improvement: estimating
- Carpentry trades
- Site Logistics
- Walk through procedures
- Zero punch list

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. PL is capped at 30 hours per-trainee.



**Training Proposal for:  
Hall Ambulance Service, Inc.**

**Agreement Number: ET18-0188**

**Panel Meeting of:** March 23, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Paccereili

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SET Medical Skills Training HUA	Industry Sector(s):	Healthcare Services  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Kern	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: 455	U.S.: 455	Worldwide: 455
<u>Turnover Rate:</u>	12%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$242,550		\$0	\$0		\$242,550

<b>In-Kind Contribution:</b>	<b>100% of Total ETP Funding Required</b>	<b>\$335,880</b>
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Medical Skills Training Priority Rate SET HUA	MST Didactic & Clinical Preceptor, Computer Skills, Cont. Imp.	385	8-200	0	\$630	*\$12.53
				Weighted Avg: 35			

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

<p><b>Minimum Wage by County:</b> \$12.53 per hour in Kern County</p> <p><b>Health Benefits:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No This is employer share of cost for healthcare premiums – medical, dental, vision.</p> <p><b>Used to meet the Post-Retention Wage?:</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe</p> <p>Up to \$1.53 per hour may be used to meet the Post-Retention Wage.</p>
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Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Emergency Medical Technician (EMT)		190
Paramedic		130
Registered Nurse		20
Dispatcher		20
Administrative Staff		25

**INTRODUCTION**

Founded in 1971, Hall Ambulance Services, Inc. (Hall Ambulance) ([www.hallamb.com](http://www.hallamb.com)) is the largest emergency and non-emergency medical transportation provider in Kern County, providing transport services to 90 percent of Kern County with a base operation in Bakersfield. The Company has 16 locations that also services the communities of Lamont, Arvin, Frazier Park, Taft, Shafter, Mojave, Tehachapi, Boron, California City, and Rosamond. All locations will be participating in this proposal. The Company is a member of the California Ambulance Association and the American Ambulance Association.

**PROJECT DETAILS**

The proposed training will focus on the Emergency Medical Technicians (EMT) and Paramedics. Hall Ambulance is currently experiencing a shortage of ETMs. The Company will need to hire employees with no experience and/or from unrelated fields due to a shortage of EMTs in Kern County. These employees will need extensive training to gain competence in pre-hospital assessment and care of patients of all ages with a variety of medical conditions and traumatic injuries. Training will include an introduction to emergency medical services, anatomy and physiology, medical emergencies, trauma, pre-hospital setting, and patient transportation. Further, Hall Ambulance encourages and trains incumbent EMTs to become Paramedics. The

Company's Paramedic program typically requires between 1,200 to 1,800 training hours. Trainees promoting to Paramedic will receive a maximum of 200 hours of training. Incumbent Paramedics will continue to receive medical skills and continuous improvement training to ensure they are current with the latest medical techniques and healthcare requirements.

Additionally, Hall Ambulance is expanding operations due to increased demand for services. To keep up with demand, the Company needs to provide employees with skills and knowledge to provide quality, safe patient care required by the Affordable Care Act.

### **Training Plan**

ETP funding will help the Company subsidize the high cost of training while providing long term, secure jobs despite facing a host of challenging requirements. This, in turn, will increase the commitment and retention of its employees, promote career advancement, and sustain growth.

**Continuous Improvement** - Training will be provided to all occupations to foster improvement in communication, customer service, leadership, standard operating procedures, and team building.

**Computer Skills** – Training will be offered to all occupations in the use of the new Electronic Medical Records (EMR) system so employees can accurately enter and retrieve patient information. Trainees will also receive Client Management Relationship (CMR) and Client Billing software.

### **Medical Skills**

Training will be offered to EMTs, Paramedics, and Nurses. Trainees will receive the latest medical techniques and methodologies to incorporate best practices into their daily routines. This training will focus on patient care and life support, equipment operation, and transport techniques to ensure competency and maximize patient satisfaction and safety.

### **Commitment to Training**

The Company's current annual training budget is approximately \$800,000 for training in California training programs including new hire orientation, sexual harassment prevention, diversity, conflict resolution, and general 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

Hall Ambulance's Critical Care Manager will oversee training and project administration. Training will be provided by dedicated in-house trainers and subject-matter experts. The Company has a well-established training platform and internal administrative procedures. Training will occur at all facilities. However, training records will be centrally maintained at its main office in Bakersfield. The Company has also retained an administrative subcontractor to ensure that all training records meet ETP compliance.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

Hall Ambulance retained Training Refund Group (TRG) in Anaheim to assist with development of this proposal for a flat fee of \$8,000.

### **ADMINISTRATIVE SERVICES**

Hall Ambulance also retained TRG to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

### **TRAINING VENDORS**

N/A

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

8-200

Trainees may receive any of the following:

**MEDICAL SKILLS (DIDACTIC)**

- Abdominal Emergencies
- Advanced Cardiac Life Support (ACLS)
- Airway Management
- Allergic Reaction
- Ambulance & Medical Equipment Operation
- Anatomy & Physiology
- Assessments
- Behavioral/Psychiatric Emergencies and Suicide
- Bleeding and Shock
- Cardiology
- Cardiac Emergencies
- Chest and Abdominal Trauma
- Diabetic Emergencies and Altered Mental Status
- Emergency Medical Care
- Emergencies for Patients with Special Challenges
- Environmental Emergencies
- Geriatric Abuse – Special Home
- Geriatric Emergencies
- Hazardous Materials, Multiple-Casualty Incidents, and Incident Management
- Hematologic and Renal Emergencies Life Span Development
- Highway Safety and Vehicle Extrication
- Life Span Development
- Lifting and Moving Patients
- Medical Training
- Medical Terminology
- Multisystem Trauma
- Musculoskeletal Trauma
- Neonatal
- Obstetrics & Gynecology
- Pediatric Advanced Life Support (PALS)
- Pediatrics
- Pharmacology
- Poisoning and Overdose Emergencies
- Research Principles and Evidence-Based Practice
- Respiration and Artificial Ventilation
- Respiratory Emergencies Scene Size-Up
- Scene Size-Up
- Soft-Tissue Trauma
- Transport Physiology
- Trauma to the Head, Neck, and Spine
- Ventilation, Perfusion, and Shock: Understanding Pathophysiology
- Vital Signs and Monitoring Devices

**MEDICAL SKILLS – CLINICAL PRECEPTOR**

- Supervised Clinical Field Ambulance Training

**COMPUTER SKILLS**

- Electronic Medical Records System (EMS)
- Accounting software
- Client Management Relationship
- Client Billing Software
- Scheduling software

**CONTINUOUS IMPROVEMENT**

- Communication
- Customer Service
- Documentation
- EMS Operations
- EMS Response to Terrorism/Clinical & Ambulance Rotations
- Leadership
- Team Building
- Standard Operating Procedures
- Transport Logistics and Standardized Protocols
- Well Being of the EMT
- Well Being of a Paramedic

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:  
Hansen Engineering Co.**

**Small Business**

**ET18-0180**

**Panel Meeting of:** March 23, 2018

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

**CONTRACTOR**

- Type of Industry: Manufacturing  
Aerospace and Defense  
Priority Industry:  Yes  No
  
- Number of Full-Time Employees  
California: 70  
Worldwide: 70  
Number to be trained: 71  
Owner  Yes  No
  
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 5%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$55,380
- In-Kind Contribution: \$96,493

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, HazMat, PL-Mfg. Skills	66	8-60	0	\$780	\$17.54
				Weighted Avg: 30			
2	Retrainee Job Creation SB <100 Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, HazMat, PL-Mfg. Skills	5	8-60	0	\$780	*\$14.62
				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 or local minimum wage rate as in effect at the end of retention regardless of the wage expressed in this table. The highest minimum wage rate will prevail.

- Reimbursement Rate: Job #'s 1 & 2: \$26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Production, Administrative Staff, Supervisor/Manager, Owner
- Union Representation:  Yes  
 No
- Health Benefits: Job #'s 1 & 2: \$2.50 per hour

**SUBCONTRACTORS**

- Development Services: Training Funding Source (TFS), Seal Beach, assisted with development for a flat fee of \$3,900.
- Administrative Services: TFS will also provide administration services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 1962 and located in Harbor City, Hansen Engineering Co. (Hansen) ([www.hansenengineering.com](http://www.hansenengineering.com)) manufactures precision machined multi-axis parts and other major structural assemblies. The Company provides airframe and missile parts profiling and milling for the commercial and military industries. Products include complex Multiple Document Interface surface geometry, statistical process control and electronic part surface probing. Hansen is an approved supplier for Spirit Aerosystems on the 737 next generation aircraft

program and for the Boeing 767-2C tanker program including the Pressure Box and the Boom Fairing. Customers include Ford Motor Sport Division, Northrop and McDonnell Douglas.

With the progress in technology and updates in industry requirements Hansen must maintain a quality system compliant to BQMS D6-82479, AS9100:2009 and ISO-9001:2008; and implement continuous quality improvement in products and services.

Hansen has experienced a 15% growth per year, in the last three years, and plans to add five new machines over the next four years, two of which will be installed this year. Hansen also plans to expand into an adjacent facility which will increase its workspace by 17,000 square feet.

### **Need for Training**

Hansen conducted a training needs assessment and determined that staff must upgrade skills on various equipment, software, ISO certification and standards, and production processes. ETP-funded training will help provide process and quality improvement, task-oriented skills and cross-training on Hansen's manufacturing processes and technical equipment.

Additionally, Hansen is installing additional CNC Machines (Mazark) and implementing a new ERP workflow process (JobBoss ERP) to improve manufacturing processes, reduce cost and improve quality.

### **Training Plan**

Training will be provided by In-house experts and vendors as needed.

**Business Skills:** Training will be offered to Production, Administrative Staff and Managers/Supervisors to develop skills in product knowledge, customer relations and process management. Coaching and developing leadership skills for Supervisors/Managers will create better leaders and mentors to lead and guide the workforce.

**Computer Skills:** Training will be offered to all occupations to develop overall skills and knowledge in software tools like Microsoft Office Excel, PowerPoint, Outlook and the Company's new ERP software system (JobBoss ERP).

**Manufacturing Skills:** Training will be offered to Production workers to enhance skills in quality inspections, new manufacturing processes, equipment and troubleshooting techniques and tools.

**Continuous Improvement:** Training will be offered to all occupations to create an effective culture of Lean manufacturing. Training will focus on certification requirements and process improvement. Hansen is moving towards increasing efficiencies across all areas by eliminating waste and redundancy in internal processes.

**Hazardous Materials:** Training will be offered to Owner, Production and Supervisor/Manager occupations to ensure the proper and safe handling of toxic materials involved in manufacturing.

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

PL trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. In addition to the Class/Lab training, Hansen will provide up to 20 hours of PL-Manufacturing Skills training to Production workers on various tools and equipment used during production. This training cannot be duplicated in a Class/Lab setting as the equipment is heavy,

job specific and complex. Hansen requests a trainer-to-trainee ratio of 1:2 due to the complexity of some of the equipment, requiring its full operation by least two employees.

### **Commitment to Training**

Hansen has an annual training budget of \$55,000 which includes on-the-job and mandatory training, employee orientation, OSHA mandated training, sexual harassment prevention and first-aid training. ETP funds will not displace the Company's existing financial commitment to training. Safety training provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

Hansen is ready to start training upon approval. The Company President and a Human Resources staff will serve as project administrator, scheduling and coordinating training. Hansen has retained the services of Training Funding Source to assist with enrollment, data collection and data entry.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8-60

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Coaching/Communication
- Conflict Resolution
- Customer Relations
- Accounting/Finance
- Goal Setting
- Inventory Control
- International Traffic in Arms Regulations
- Leadership
- Marketing & Business Development
- Performance Management
- Program Management
- Product Knowledge
- Project Management
- Team Cohesiveness

**HAZARDOUS MATERIALS**

- Hazardous Materials Handling

**COMPUTER SKILLS**

- Accounting
- CAD/CAM
- Crystal Reports
- ERP Software
- MRP
- MS Office/Project
- Payroll
- Program Management
- Purchasing
- Quote FX
- R4
- Scheduling
- Warehouse

**CONTINUOUS IMPROVEMENT**

- 6S
- AS9100
- Corrective/Preventive Actions
- Lean Manufacturing
- Process/Productivity/Quality improvement

**MANUFACTURING SKILLS**

- Blueprint Reading
- Coordinate Measuring Machine Inspection/Programming
- Equipment/Tool Operation, Maintenance & Troubleshooting
- Good Manufacturing Practices
- Inspection Techniques
- Preventative maintenance
- Quality Systems
- Surface Mount Defects—Causes and Prevention
- Standard Operating Procedures
- Statistical Process Control

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

**PL Hours**

0 – 20

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

- Equipment Operations
- Materials Handling and Storage

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. PL is capped at 20 hours per-trainee.



**TRAINING PROPOSAL FOR**  
**Hydratech, LLC**  
**18-0596**

**Panel Meeting Date:** 03/23/2018  
**Regional Office:** Sacramento Regional Office  
**Analyst Name:** Dumaurier Jordan  
**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.

<b>TOTAL ETP FUNDING:</b>		<b>\$59,280.00</b>	
<b>Program &amp; Admin Cost</b>	<b>Support Cost (\$)</b>	<b>Substantial Contribution (\$)</b>	<b>Total In-Kind</b>
\$59,280.00	N/A	\$0.00	\$68,400.00

**APPLICANT PROFILE**

<b>Company Summary</b>	Hydratech, LLC (Hydratech) is a hydraulic and pneumatic cylinder manufacturer that services multiple industries including agriculture, construction, mining, and transportation.
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<b>Industry Sector(s)</b>	Manufacturing		
<b>Priority Industry</b>	Yes		
<b>No. Employees (Applicant)</b>	<b>State:</b> 55	<b>US:</b> 55	<b>World Wide:</b> 55
<b>Turnover Rate (Applicant)</b>	10.00 %		
<b>Repeat Contractor</b>	No		
<b>High Unemployment Area</b>	Yes		
<b>Union(s)</b>	N/A		

## **TRAINING PROFILE**

### **Training Objective(s)**

Hydratech's training plan will focus on improving manufacturing practices and processes to meet customer requirements of quality and demand.

Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

<b>#</b>	<b>Group Characteristics</b>	<b># Of Trainees</b>	<b>Reimbursement Rate</b>	<b>Weighted Avg. Hours</b>	<b>Cost Per Trainee</b>	<b>Min-Max Hours</b>
1	Retrainee	35	\$26.00	60	\$1560	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	3	\$26.00	60	\$1560	8 - 60



# PROPOSED TRAINING PROJECT DETAILS

## 1. Company Background

Founded in 1977 and headquartered in Fresno, Hydratech is a custom cylinder manufacturer specializing in hydraulic and pneumatic cylinders as well as cylinder components. The Company's engineering capabilities build superior cylinder solutions utilized in agricultural, construction, mining and airline equipment. Hydratech's products are used worldwide by clients such as the U.S. Armed Forces and U.S. Government.

This is Hydratech's first ETP Agreement. All training will take place at its location in Fresno.

## 2. Current Training Project Details

<b>Purpose of Training</b>	<p>Hydratech reports a continued increase in demand for hydraulic and pneumatic cylinders. As one of the nation's leading cylinder manufacturers, the company must continue to develop innovative solutions, from conception to reality, to meet customer needs. Training will give employees the necessary skills to bring concepts to a reality.</p> <p>Training will increase employee skill sets to improve processes and productivity. Courses consisting of welding machine operation, quality control, blueprint reading, and Computer Numerical Control (CNC) program functions will ensure trainees become subject-matter experts. Staff will be trained to properly prep, prime and finish parts to meet manufacturing specifications.</p> <p>All training will be conducted via class/lab to ensure staff has a clear understanding of all processes and techniques. ETP-funded training will provide Hydratech's workers with knowledge and skills to make them more promotable in the manufacturing industry while supporting customer demands and overall business growth.</p>
<b>Training Infrastructure and Administrative Plan</b>	<p>Hydratech has designated its Human Resources Director and additional staff members to plan, schedule and ensure all aspects of training are in compliance with ETP guidelines. In addition, Hydratech has retained the services of a third-party administrative subcontractor to assist with administrative requirements. Training will be provided by In-house trainers.</p>
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A
<b>Substantial Contribution Description</b>	N/A

# PROPOSED TRAINING PROJECT DETAILS

## 3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
<b>Summary</b>	
All occupations identified in Attachment 1, Exhibit A will receive training applicable to their jobs in Manufacturing Skills topics under Attachment 2, Exhibit B.	

## 4. Additional Company or Training Project Details

### Retrainee – Job Creation

Hydratech has seen a continued increase in its customer base and demand for products over the last few years. In response, the Company is committed to hiring three new full-time CNC Machinists (Group Number 2) to train on new technology and program functions. 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.

### 4.1 Program Waivers

No waivers have been applied to this proposed project.

### 4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	San Joaquin Valley College	Visalia	\$1,500
Administrative	San Joaquin Valley College	Visalia	Not to exceed 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

Attachments 1 and 2 provide details on the training, curriculum, and 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>
<b>Training Type (Level)</b>	<b>Planned Course Offerings</b>
Manufacturing Skills (ME) (Standard)	Assembly for Machined and Purchased Parts
	Blueprint and Engineering Drawings
	Changing Welding Wire or welding gasses
	Chipping excess weld, slag or spatter
	Connecting Cables for Welding Units
	Documentation of scrapped materials
	Electric Hoist Operation
	Hand Tool Usage
	How to Run Specific CNC Programs on each Machine
	Introduction to Machining
	Machine Tool Set -up-Load and Unloading Parts
	Machine Tool Set-up for product assembly
	Manual application of filler rod
	Manually Guide Electrode or gun to specifications
	Operation of Automotive and Industrial Lift trucks
	Operation of Electric Power Tools
	Portable Welding Gun Use
	Preparing, Priming, and Finish Painting
	Preventative Maintenance for shop equipment
	Producing Documentation for Manufacturing
	QC Performance Checks for Assembled Painted Parts
	Quality Control Principles
	Setting up machines from engineering drawings
	Shop Math for Manufacturing Calculations
	Understanding Machine Code
	Understanding Numerical Controls
	Understanding Standard Work Instructions
	Utility Torch and Carbon Arc Operation
	Verifying Operations for Parts Manufacturing
	Welding Basics - GMAW- Mig
	Welding Basics - SMAW- Stick
	Welding Quality Control
	Welding Repairs to Broken or Cracked Parts
Welding Strikes	



**Training Proposal for:  
Johanson Dielectrics, Inc.**

**Agreement Number: ET18-0193**

**Panel Meeting of:** March 23, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** J. Romero

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, 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: 323	U.S.: 323	Worldwide: 323
<u>Turnover Rate:</u>	13%		
<u>Managers/Supervisors:</u> (% of total trainees)	16%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$99,000		\$0	\$0		\$99,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$204,180
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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	110	8-200	0	\$900	\$16.70
				Weighted Avg: 50			

**Minimum Wage by County:** \$17.54 per hour for Los Angeles County and \$16.70 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.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Engineer		10
Administrative Staff		26
Sales Staff		13
Assembly and Testing Staff		43
Manager/Supervisor		18

**INTRODUCTION**

Founded in 2003, Johanson Dielectrics, Inc., (JDI), ([www.johansondielectrics.com](http://www.johansondielectrics.com)), is a wholly-owned subsidiary of Johanson Ventures, Inc., specializing in the manufacturing of passive ceramic components. Operating in two facilities in California, Sylmar and Camarillo, JDI designs and manufactures standard and high voltage ceramic chip capacitors in the medical, military, aerospace and mobile/wireless sectors.

Overseas competition continues to drive prices down. To remain competitive, JDI needs to increase process efficiency, product quality, and assure compliance to supply chain tracking systems. In addition, the Company has added Power Thin Film Resistor RHF series to its product line, necessitates additional manufacturing, testing and inspection procedures. JDI must upgrade its quality and process certifications for AS9100 (Aerospace), ISO 9001(International Manufacturing), ROHS (Restriction of Hazardous Substances Directive) and ITAR (International Traffic and Arms). JDI must provide extensive training on the production of new line.

Training for this ETP proposal will take place at the Company’s facilities in Sylmar and Camarillo.

## **PROJECT DETAILS**

This will be JDI's second ETP Agreement, and the second in the last five years. The prior Agreement focused on process improvement and various certifications. This proposal will focus on product demand and technology upgrades. Training will also focus on task-oriented procedural change based on newly defined standard operating procedures, new product development, and training upgrades in the Company's process certifications. In this proposal, workers will receive training on the processes involved in manufacturing, skills in communicating effectively and effective ways to market products. Training in this proposal will not be a duplicate training of the prior Agreement

### **Training Plan**

Training will be delivered by in-house experts and vendors as needed via class/lab.

**Business Skills:** Training will be offered to Manager/Supervisor, Sales and Administrative Staff in selling and marketing strategy, problem solving and decision making and technical support to customers. Training will equip workers with customer service skills essential in marketing products.

**Computer Skills:** Training will be offered to all occupations in the Company's expanded MRP System.

**Manufacturing Skills:** Training will be offered to Assembly and Testing Staff, Engineer and Manager/Supervisor in design and production processes. Training is to give workers the skills to manufacture quality products more efficiently.

**Continuous Improvement:** This training will be offered to all occupations. Training will focus on manufacturing process certifications and workflow efficiency. Employees will learn to independently recognize and improve processes.

**Hazardous Materials:** Training will be offered to Assembly and Testing Staff and Manager/Supervisor to ensure the proper and safe handling of toxic materials involved in manufacturing.

### **Commitment to Training**

JDI's annual training budget of \$75,000 covers job-specific training for orientation, anti-harassment and computer-based 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 has a detailed training schedule in place and is ready to start training upon project approval. JDI has retained Principal Incentive Strategist to assist two Human Resources personnel in the enrollment process, training data collection and data entry into the ETP online system.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0374	Sylmar	02/02/15 – 02/01/17	\$175,680	\$111,512 (64%)

The Company over estimated its training plan in this first Agreement. Although JDI delivered a significant amount of training, the overall scope of its training plan was still too broad causing many oversight in capturing and recording training.

In this proposal, the Company narrowed their scope of training and developed a more focused training plan. The curriculum is specific to the needs of the employees and the number of training hours is consecutive and manageable (average of two hours per month, per trainee).

The amount of this proposal has been right-sized to less than the amount earned in the previous agreement.

**DEVELOPMENT SERVICES**

Principal Incentive Strategist in San Clemente assisted with development for a flat fee of \$4,950.

**ADMINISTRATIVE SERVICES**

Principal Incentive Strategist 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**

- Marketing Strategy and Implementation
- Customer Service and Retention
- Project Management
- Problem Solving and Decision Making Skills

#### **COMPUTER SKILLS**

- Production Management
- MRP System Expansion

#### **CONTINUOUS IMPROVEMENT**

- Production Operation and Workflow
- International Traffic in Arms
- ISO 9001/AS9100D Quality Systems
- Environment Practices and Awareness Techniques
- Problem Solving and Decision Making Skills

#### **HAZARDOUS MATERIALS**

- Hazardous Materials Handling and Disposal

#### **MANUFACTURING SKILLS**

- Production Parts and material Assembly

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
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**TRAINING PROPOSAL FOR  
LPL Financial, LLC  
17-0742**

**Panel Meeting Date:** 03/23/2018  
**Regional Office:** San Diego Regional Office  
**Analyst Name:** Maria Ibarra  
**Type of Proposal:** Single Employer  
**Funding Source:** SET

**FUNDING OVERVIEW**

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

<b>TOTAL ETP FUNDING:</b>		<b>\$ 216,000.00</b>	
<b>Program &amp; Admin Cost</b>	<b>Support Cost (\$)</b>	<b>Substantial Contribution (\$)</b>	<b>Total In-Kind</b>
\$ 216,000.00	N/A	\$ 0.00	\$ 450,936.00

**APPLICANT PROFILE**

<b>Company Summary</b>	LPL Financial, LLC (LPL Financial) ( <a href="http://www.lpl.com">www.lpl.com</a> ) is an independent broker/dealer company that provides integrated platform, proprietary technology, and brokerage and investment advisory services to financial advisors.
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<b>Industry Sector(s)</b>	Finance & Insurance		
<b>Priority Industry</b>	No		
<b>No. Employees (Applicant)</b>	<b>State:</b> 1300	<b>US:</b> 3500	<b>World Wide:</b> 3500
<b>Turnover Rate (Applicant)</b>	11.00 %		
<b>Repeat Contractor</b>	No		
<b>High Unemployment Area</b>	No		
<b>Union(s)</b>	N/A		

## **TRAINING PROFILE**

<b>Training Objective(s)</b>	Provide supplemental skills training to frontline workforce to ease adoption and support of technological initiatives. Training will also allow workers to efficiently manage job functions.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

<b>#</b>	<b>Group Characteristics</b>	<b># Of Trainees</b>	<b>Reimbursement Rate</b>	<b>Weighted Avg. Hours</b>	<b>Cost Per Trainee</b>	<b>Min-Max Hours</b>
1	Retrainee	600	\$ 15.00	24	\$ 360	8 - 200

# PROPOSED TRAINING PROJECT DETAILS

## 1. Company Background

Founded in 1989 and located in San Diego, LPL Financial, formerly known as LPL Financial Corporation, operates as a subsidiary of LPL Holdings, Inc. LPL Holdings, Inc. is headquartered in Boston, Massachusetts, with additional subsidiary offices in Charlotte, North Carolina and Washington, D.C. This project will train workers at the LPL Financial San Diego location only.

LPL Financial provides business consulting, business development, marketing support, practice management programs, and training services to assist independent entrepreneurial financial advisors grow their business. The Company also provides research; advisory program services; sales support; compliance; transition; and technology services; marketing and training; and other related customer services to community and regional banks and credit unions.

## 2. Current Training Project Details

### Purpose of Training

LPL Financial experienced significant growth last year. In August 2017, the Company acquired assets from National Planning Holdings, Inc. (NPH), an independent broker dealer network with 3,000 advisers (including National Planning; INVEST Financial Corporation; Investment Centers of America, Inc.; and SII Investments, Inc) and \$120B of client assets.

To support its growth and realize its business goals, LPL Financial recently implemented new technology to improve services:

- Next generation advisor platform, ClientWorks. The new platform will allow advisors to enhance business relationships. The system will allow the Company to customize insights through analytics to better support productivity, integrate workflows, and improve client and account management;
- Fully integrated, digital advice solution, allowing the Company to better support different markets and small accounts and enabling advisors to spend more time with clients addressing individual issues;
- Additional technology solutions such as improved portfolio management and reporting tools. These solutions will allow customers to spend more time growing their businesses and less time completing administrative tasks.

Additionally, LPL Financial must also capitalize on the trend toward technological independence. The Company is committed to taking advantage of change and evolving trends in digital technology to enhance financial services.

## PROPOSED TRAINING PROJECT DETAILS

<b>Training Infrastructure and Administrative Plan</b>	LPL Financial will contract with an administrative subcontractor to assist with ETP project administration. The Company has also designated five individuals from its Human Capital and Human Resources Departments to manage the ETP project. These individuals will oversee the entire project and share responsibility in overall administration, specifically, scheduling and documenting training and submitting LMS records to the subcontractor for uploading into ETP's Online System.
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A
<b>Substantial Contribution Description</b>	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
<b>Summary</b>	
Training in Business, Computer, and Continuous Improvement will be provided to approximately 600 frontline workers (Operations Staff).	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
<b>Summary</b>	
Training in Business, Computer, and Continuous Improvement will be provided to approximately 600 frontline workers (Operations Staff).	

### 4. Additional Company or Training Project Details

#### Computer-Based Training (CBT)

LPL Financial develops 75% of its CBT courses internally through its Training and Development Department due to the proprietary nature of the content. During development, each CBT course includes a series of assessments that may include questions, tests, knowledge reviews, and assessment activities to measure content, knowledge, skill level, and completion of the course.

The Company reports that, dependent on individual's training needs and training plan, some trainees may receive up to 100% of their training via CBT. As such, LPL Financial requests to allow CBT of up to 100% of a trainee's total training hours. This request would allow trainees to train at their own pace and, for some, may be provided to complement classroom/instructor-led training to ensure

## PROPOSED TRAINING PROJECT DETAILS

learning/skills transfer. Further, CBT will allow flexibility in providing critical training to meet business needs.

### Electronic Recordkeeping

LPL Financial will utilize a Learning Management System (LMS) to schedule training and track training attendance. The system has been reviewed and approved by ETP staff.

### 4.1 Program Waivers

N/A

### 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 Partners	Fountain Valley	\$ 10,800.00
Administrative	Training Funding Partners	Fountain Valley	Not to exceed 13.00% 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 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.

Delivery Method /Level	Classroom/Simulated Laboratory	
Training Type (Level)	Planned Course Offerings	
Business Skills	Business Development/Planning Skills	
	Business/Technical Writing Skills	
	Communication/Effective Listening Skills	
	Conflict Resolution Skills	
	Customer Service Skills	
	New/Updated Product Skills	
	Presentation Skills	
	Product Risk/Compliance	
	Sales/Marketing Skills	
Computer Skills (Standard)	ClientWorks System Skills	
	Intermediate/Advanced Microsoft Office Skills	
	Proprietary System Skills	
	Salesforce System	
	Web Navigation Skills	
Continuous Improvement Skills	Agile/Project/Process Management	
	Change Management	
	Coaching/Feedback Skills	
	Critical Thinking Skills	
	Developing Goals/Objectives	
	Leadership Skills	
	Problem Solving/Troubleshooting	
	Process Improvement/Innovation Skills	
	Process/Performance/Professional Management and Development	
	Product Development/Innovation Skills	
	Team Building/Team Management	

Delivery Method /Level	E-Learning – Computer Based Training (CBT)	
Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	2016 AML OFAC Targeted Training (STO)	0.25
	2016 Customer Complaints Training	0.50
	2016 Electronic Communication	0.50
	2016 Financial Crimes - Anti Money Laundering for	0.50
	2016 Financial Crimes-Anti Money Laundering-PTC Ho	0.50
	2016 Insider Trading Policy	0.50
	2016 Security and Privacy	0.50
	2016 Working with Senior and Vulnerable Adults for Employees	0.25
	2017 Anti-Money Laundering, Financial Crimes and Fraud for Home Office Employees	0.50
	2017 Anti-Money Laundering, Financial Crimes and Fraud for PTC	0.50

## Attachment 2 - Training Delivery and Curriculum Listing

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

Employees	
2017 Business Continuity Planning and Readiness Policy Attestation	0.25
2017 Closed End Funds	0.50
2017 Customer Complaints	0.25
2017 Insider Trading Policy	0.25
2017 Outside Business Activity and Private Securities Transactions Training for Home Office Employees	0.25
2017 Record Retention Policy Attestation	0.25
529 College Savings Plans	0.25
Account and Security Maintenance	0.50
Account Feature - Checkwriting	1.00
Account Feature - Margin	2.00
Account Feature - Options Trading	1.00
Account Opening & eSignature	0.50
Account Registrations and Platforms	0.25
Account Transfers	0.50
Account Transfers - Funding Accounts	0.25
Account View Getting Started	0.50
Account Withdrawals	0.50
Advisory vs. Brokerage Services: What are the differences?	0.25
Advisory Account Platform Documentation	0.50
Advisory Alert Review Guidelines for Supervisors	0.25
Advisory Compliance Overview	0.50
Advisory Overview	0.25
Advisory Platforms Overview	0.75
Alternative Investments	0.50
Analyzing Financial Statements for Non-financial Professionals	1.00
AXA Investment Edge Select Variable Annuity	0.25
AXA Resource Center Overview	0.25
Basic Accounting Principles and Framework	1.00
Basic Presentation Skills: Creating a Presentation	1.00
Basic Presentation Skills: Delivering a Presentation	1.00
Basic Presentation Skills: Planning a Presentation	1.00
Business Management and Strategy: HR and the Strategic Planning Process	1.00
Business Management and Strategy: HR Function and Business Environment	1.00
Business Management and Strategy: HR Functions and Roles	1.00
Business Writing: How to Write Clearly and Concisely	1.00
Business Writing: Know Your Readers and Your Purpose	1.00
Call Model - Interacting with Caller	1.00
Capital Budgeting: The Capital Budgeting Process	1.00

## Attachment 2 - Training Delivery and Curriculum Listing

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

CIP: Customer Information Program Essentials	0.50
Closed-End Funds	0.50
Competitive Awareness and Strategy	0.25
Compliance as an Essential Partner	0.25
ComplianceMAX: Advertising Review	0.50
ComplianceMAX: Designations and Titles	0.50
Correspondence Etiquette	0.50
Cost Basis Overview	0.25
Cost Basis Selections in BranchNet	1.00
Custom Fee Billing	0.25
Customer Advocacy: Enhancing the Customer Experience	1.00
Customer Focus Video Series	0.25
Customer Identification Program	0.50
Customer Identification Program -CIP	0.25
Customer Service Confrontation and Conflict	1.00
Customer Service Fundamentals: Building Rapport in Customer Relationships	1.00
Customer Service over the Phone	1.00
DISC - Your Communication Style (e-learning)	0.50
DISC Custom (e-learning)	0.50
DOL Rule Options for Retirement Plan Advisors	0.25
Don't Wait - Escalate!	0.50
Ensuring Successful Presentation Delivery	0.50
Essential Skills For Professional Telephone Calls	1.00
Exchange Traded Products	0.50
Fiduciary Essentials: Insights of DOL Fiduciary Rule	0.50
Fiduciary Essentials: Overview of DOL Fiduciary Rule	0.50
Financial Communication	0.25
Funding Accounts	0.25
Guided Wealth Portfolios (GWP) Account Management	0.50
Guided Wealth Portfolios (GWP) Enrollment	0.50
Guided Wealth Portfolios (GWP) Getting Started	0.50
Guided Wealth Portfolios (GWP) Overview	0.50
Harvard ManageMentor: Budgeting	2.00
Harvard ManageMentor: Business Case Development	2.00
Harvard ManageMentor: Business Plan Development	2.00
Harvard ManageMentor: Customer Focus	2.00
Harvard ManageMentor: Difficult Interactions	2.00
Harvard ManageMentor: Finance Essentials	2.00
Harvard ManageMentor: Marketing Essentials	2.00
Harvard ManageMentor: Negotiating	2.00



## Attachment 2 - Training Delivery and Curriculum Listing

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

Harvard ManageMentor: Presentation Skills	2.00
Harvard ManageMentor: Writing Skills	2.00
How Clients View Accounts	1.00
How We Make Money	0.50
How We Win: LPL's Three-Year Strategic Framework	1.00
Human Resources Core Knowledge: Functions and Activities	1.00
Industry Basics	0.25
Industry Basics Certification 01 - Get to know the	0.25
Industry Basics Certification 02 - The Broker/Dealer	0.25
Industry Basics Certification 03 - Rules and Regulations	0.25
Industry Basics Certification 04 - Our Customer: Brokerage, Advisory, and Direct Business	0.25
Industry Basics Certification 05 - Stocks	0.25
Industry Basics Certification 06 - Bonds	0.25
Industry Basics Certification 07 - Mutual Funds	0.25
Industry Basics Certification 08 - Annuities	0.25
Industry Basics Certification 09 - Life Insurance	0.25
Industry Basics Certification 10 - Alternative Inv	0.25
Industry Basics Certification 11 - Retirement Plan	0.25
Industry Basics Certification 12 - 529 College Savings Plans	0.25
Introduction to Auditing	1.00
Introduction to Information Security	1.00
Introduction to Non-Traded REITs	0.50
Introduction to Private Equity	0.50
Introduction to Regulatory Reporting	0.50
iOS Security Architecture and Application Data Protection	1.50
IS Clearing Services and AXA Overview	1.00
Leveraging Your Networks	2.00
Lincoln Investor Advantage Variable Annuity	0.25
LPL Advocacy and the DOL Fiduciary Rule	0.25
LPL Compliance Mindset	0.25
LPL Financial's Statement on Standards for Attestation Engagements	1.75
LPL Service in GRC	0.25
Making and Carrying out tough decisions	0.50
Making the Most of Email	0.25
Making the Most of Meetings	0.25
Managed Account Basics	0.25
Managed Future Funds	0.50
Managing Client Statements	0.50
Managing Workforce Generations: Introduction to Cross-Generational Employees	1.00
Managing Workforce Generations: Working with the 21st-Century	1.00

## Attachment 2 - Training Delivery and Curriculum Listing

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

Generation Mix	
Modifying Accounts	3.00
MRR Monthly Analyst Meeting   July 2016	1.00
New Accounts 101	0.25
Non-Genuine Signatures	0.25
Options	0.50
Organizational Budgeting Activities and the Master Budget	1.00
OSJ Module 1: Compliance Overview	0.50
OSJ Trade Blotter Required Training	1.00
Outgoing Account Transfers	0.25
Outside Investment Basics	0.25
Overview Life Insurance 101	0.25
Partnerships That Empower: Building Critical Relationships	0.25
Principles of Accounting and Finance for Non-financial Professionals	1.00
Private Trust Company Overview	0.25
Proactive Surveillance	0.50
Proactive Surveillance - LPL Advisory	0.50
Processing Move Money Requests	1.25
Protective Variable Annuity Investors	0.25
Providing Service Excellence: The LPL Way	1.00
Prudential Premier Investment Variable Annuity	0.25
RACI	0.50
Required Training Record Management	0.25
Resource Center - Part 1: Features and Benefits	0.25
Retirement Accounts	0.50
Reviewing and Logging Account Applications	3.00
Risk Basics and Your Role	0.50
Securing Against Threats, Securing for Enterprise, and Jailbreaking Devices	1.50
Service Center: AXA New Accounts Module 1	0.50
Service Center: AXA New Accounts Module 2	0.50
Small Market Solution	0.25
Solving for the DOL Fiduciary Rule	0.25
The Corporate Actions Tool	1.00
The Ladder of Inference: Avoid Jumping to Conclusions	0.25
The LPL Branch Office	0.25
The RIA Custody Platform at LPL	1.75
Trade Activation: Order Placement and Tracking	0.75
Trade Direct	0.25
Trading Policies & Procedures	0.25
Transfer on Death	2.00

## Attachment 2 - Training Delivery and Curriculum Listing

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

	TSHD & Order Fulfillment Overview	0.25
	Understanding LPL: Our Clients, Our Business, and You!	0.25
	Understanding Strategy and Its Role at LPL	0.25
	Vendor Risk Management	0.50
	Who Is LPL and Who Is Our Client	0.25
Computer Skills	Adobe CQ5 Training: Creating a Detail Page	0.50
	Android Architecture, Protection, and Development	2.50
	Android Security Vulnerabilities, Testing, and Ent	2.00
	Ariba Overview	1.00
	BranchNet Enhanced Reporting Tool	0.25
	BranchNet Overview	1.00
	BTS:AppDev: Block Trading	2.00
	BTS:AppDev: Clients (Investors)	3.00
	BTS:AppDev: Cost Basis	3.00
	BTS:AppDev: LPL Lines of Business	2.00
	BTS:AppDev: LPL Product Structure	2.00
	BTS:AppDev: Portfolio Performance Calculations, Basic	3.00
	BTS:AppDev: Security Definitions, Part 1	2.00
	BTS:AppDev: Security Definitions, Part 2	2.00
	BTS:AppDev: Security Pricing	3.00
	BTS:AppDev: Trade Edits	2.00
	BTS:AppDev: Trading Basics	3.00
	BTS:AppDev: Transaction Types and Sources	3.00
	BTS:AppDev: Users, Reps, and Account Access	2.00
	CISSP: Asset Security	1.50
	CISSP: Communication & Network Security Design	2.00
	CISSP: Identity and Access Management	2.00
	CISSP: Risk Management	1.50
	CISSP: Security Assessment and Testing	1.50
	CISSP: Security Engineering Part 1	2.00
	CISSP: Security Engineering Part 2	2.00
	CISSP: Security Operations Part 1	2.00
	CISSP: Security Operations Part 2	1.50
	CISSP: Security Operations Part 3	1.50
	CISSP: Security Principles, Governance, and Guidelines	1.50
	CISSP: Software Development Security	1.00
	ClientWorks - New Account Opening Simulation	0.25
	ClientWorks - Trading (Advisor Facing Webinar Replay)	0.75
	ClientWorks FOCUS Attendee Webcast	0.50
	ClientWorks Learning Update - Redirect Prompt Vide	0.25
	ClientWorks Overview	1.00

## Attachment 2 - Training Delivery and Curriculum Listing

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

ClientWorks UX Standards	0.50
ClientWorks View/Edit Forms Video	0.25
ClientWorks: AI Order Entry	1.00
DevOps QA Pulls	0.25
DevOps: APM	0.50
DevOps: Automated Deployment	0.50
DevOps: Code Analysis	0.50
DevOps: Code Management	0.50
DevOps: Continuous Integration	0.50
DevOps: Introduction To	0.50
DevOps: Security Scanning	0.50
DevOps: Tibco Unit Testing Framework	0.50
How to Approve and Receive on Ariba Purchase Orders	0.25
How to Submit an Ariba Purchase Request (Self-Paced)	0.50
iKnow User Training	0.50
Internal Use Software Training	0.50
Introduction to Workday	0.25
ISPA: Malware Awareness	0.50
ISPA: Phishing Awareness	0.50
ISPA: Physical Security	0.50
ISPA: Social Engineering Awareness	0.50
ISPA: Travel Security	0.50
IT Project Management Essentials: Initiating and Planning IT Projects	1.00
IT Project Management Essentials: Introduction to IT Project Management	1.00
Lync 2013 Training	0.25
Maximizing ClientWorks: Client Management	1.00
Microsoft Office: Access 2010 Macros and VBA	1.00
Microsoft Office: Adding Visuals, Themes, and Styles to Excel 2010 Workbooks	1.00
Microsoft Office: Advanced Importing and Exporting with Access 2010	1.00
Microsoft Office: Analyzing Data With What-if Analysis in Excel 2010	1.00
Microsoft Office: Applying Basic Data Formatting in Excel 2010	1.00
Microsoft Office: Automating Excel 2010 Tasks Using Macros	1.00
Microsoft Office: Getting Started with Access 2010	1.00
Microsoft Office: Getting Started with Excel 2010	1.00
Microsoft Office: Getting Started with Outlook 2010	1.00
Microsoft Office: Getting Started with PowerPoint	1.00
Microsoft Office: Getting Started with Word 2010	1.00
Microsoft Office: Joins, SQL, and Action Queries in Access 2010	1.00
Microsoft Office: Optimizing, Securing, and Sharing Access 2010 Databases	1.00

## Attachment 2 - Training Delivery and Curriculum Listing

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

	Microsoft Office: PivotTables and PivotCharts in Access 2010	1.00
	Microsoft Office: PivotTables and PivotCharts in Excel 2010	1.00
	Microsoft Office: Retrieving, Validating, and Attaching Data in Access 2010	1.00
	Microsoft Office: Subforms, Subreports, and Conditional Formatting in Access 2010	1.00
	Microsoft Office: Using Access 2010 with SharePoint and Access Services	1.00
	Microsoft Office: Using Basic Formulas in Excel 2010	1.00
	Microsoft Office: Verifying Excel 2010 Data and Formulas	1.00
	Microsoft Security Fundamentals: Network Security	1.00
	Microsoft Security Fundamentals: Operating System Security	1.50
	Microsoft Security Fundamentals: Security Layers	1.00
	Microsoft Security Fundamentals: Security Software	1.00
	OSJ Review Tool	0.50
	Portfolio Manager - System Navigation and Introduction to New Enhancements Training	0.50
	Sailpoint IIQ Authorized System Access Review	0.50
	Siebel Overview and Navigation	0.25
	Systems Development Life Cycle (SDLC) Overview	0.50
	Technology Client Support Help Desk Mitigating Risk	0.50
	Visually Enhancing PowerPoint 2010 Presentations	1.00
	VM Architecture	0.25
	Workday: Change Job Process	0.25
	Workday: Delegations	0.25
	Workday: Getting Started	0.25
	Workday: Manager Dashboards and Standard Reports	0.25
	Workday: Opening a Job Requisition	0.25
Continuous Improvement Skills	ADKAR Change Management: Embracing Change	0.50
	ADKAR Change Management: Leading Change	0.50
	Agile Planning	1.00
	Agile Principles, Methodologies, and Mindset	2.50
	Building Trust	1.00
	Business Continuity Awareness	0.25
	Coaching and Mentoring Video Series	0.50
	Elements of a Cohesive Team	1.00
	Emotional Intelligence: Applying EI at Work	0.50
	Emotional Intelligence: Owning Your Emotions	0.75
	Engaging Agile Stakeholders and Leading Agile Team	2.00
	Feedback and Its Vital Role in the Workplace	0.50
	Getting Results without Direct Authority: Building Relationships & Credibility	1.00
	Getting Results without Direct Authority: Persuasive Communication	1.00

## Attachment 2 - Training Delivery and Curriculum Listing

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

Giving Feedback	1.00
Harvard ManageMentor: Change Management	2.00
Harvard ManageMentor: Coaching	2.00
Harvard ManageMentor: Crisis Management	2.00
Harvard ManageMentor: Decision Making	2.00
Harvard ManageMentor: Delegating	2.00
Harvard ManageMentor: Developing Employees	2.00
Harvard ManageMentor: Feedback Essentials	2.00
Harvard ManageMentor: Global Collaboration	2.00
Harvard ManageMentor: Goal Setting	2.00
Harvard ManageMentor: Innovation and Creativity	2.00
Harvard ManageMentor: Innovation Implementation	2.00
Harvard ManageMentor: Leading People	2.00
Harvard ManageMentor: Managing Your Boss	2.00
Harvard ManageMentor: Meeting Management	2.00
Harvard ManageMentor: Performance Measurement	2.00
Harvard ManageMentor: Persuading Others	2.00
Harvard ManageMentor: Process Improvement	2.00
Harvard ManageMentor: Project Management	2.00
Harvard ManageMentor: Retaining Employees	2.00
Harvard ManageMentor: Strategic Thinking	2.00
Harvard ManageMentor: Strategy Planning and Execution	2.00
Harvard ManageMentor: Team Creation	2.00
Harvard ManageMentor: Team Management	2.00
Harvard ManageMentor: Time Management	2.00
Introduction to Business Development Companies	0.50
Introduction to Lean	0.25
Lead Your Project like a Pro	0.50
Leadership Essentials I Video Series	0.50
Leadership Essentials II Video Series	0.50
Leading Change Video Series	0.50
Leading Teams Video Series	0.25
Leading with Emotional Intelligence Video Series	0.25
Lean for Managers: Applying Lean Techniques to Your Team	0.25
Lean for Managers: Your Role in the Lean Process	0.25
LPL Program and Project Management Protocols	0.25
Modern Performance Management	0.25
OSJ Module 2 - Supervisory Responsibilities for OSJ Managers	0.50
Planning and Monitoring Iterations in Agile Projects	1.00
Professional Practices	1.00
Receiving Feedback and Criticism	1.00

## Attachment 2 - Training Delivery and Curriculum Listing

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

Service 360 Core Values	0.25
The Lean Startup	5.00
Thinking Critically: Coming to Terms with Assumptions	0.50
Thinking Critically: Drawing Conclusions with Confidence	0.50
Thinking Critically: Getting Your Arms around Arguments	0.50
Time Management: Quit Making Excuses and Make Time Instead	0.50
Time Management: Useful Ways for More Productive Days	0.50
Use Delegation to Develop Your Team	0.50
What is Manager-led Development?	0.25



**Retrainee – Job Creation**

**Training Proposal for:**

**MSWest Enterprises dba Certified Collision Centers**

**Agreement Number: ET18-0190**

**Panel Meeting of:** March 23, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Jones

**PROJECT PROFILE**

Contract Attributes:	Retrainee SET HUA Job Creation Initiative	Industry Sector(s):	Services  Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	El Dorado, Sacramento, San Joaquin, Stanislaus	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: 120	U.S.: 120	Worldwide: 120
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$249,870		\$0	\$0		\$249,870

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 SET HUA	Business Skills, Computer Skills, Comm'l. Skills, PL-Comm'l Skills	118	8-200	0	\$1,575	*\$12.53
				Weighted Avg: 105			
2	Job Creation SET HUA	Business Skills, Computer Skills, Comm'l. Skills, PL-Comm'l Skills	33	8-200	0	\$1,940	*\$11.00
				Weighted Avg: 97			

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

**Minimum Wage by County:** Job Number 1 (SET/HUA): \$12.53 per hour for El Dorado, San Joaquin and Stanislaus counties; and \$12.60 per hour for Sacramento County  
Job Number 2 (SET/Job Creation/HUA): \$11.00 per hour for El Dorado, Sacramento, San Joaquin 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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff		11
Estimator		2
Frontline Supervisor		15
Parts Specialist		20
Technician		70
<b>Job Number 2</b>		
Administrative Staff		6
Estimator		6
Frontline Supervisor		2
Parts Specialist		6
Technician		13

## **INTRODUCTION**

Founded in 1992 and headquartered in Tracy, MSWest Enterprises dba Certified Collision Centers (MSWest) ([www.certifiedcollisiongroup.com](http://www.certifiedcollisiongroup.com)) is a full service automotive repair company. The Company specializes in collision repair and maintenance services for all major automotive brands. Services include major collision repair, cosmetic repair, frame/structural repair, and refinishing to its pre-accident condition. MSWest has nine training facilities located in Oakdale, Lodi, Galt, Tracy, Manteca, Modesto, Stockton, Sacramento and Shingle Springs. All locations will participate in ETP training.

## **PROJECT DETAILS**

This will be MSWest's first ETP Agreement. In 2017, to keep up with growth and future business needs, the Company opened two new facilities in Galt and Lodi at a cost of 3.2 million. MSWest also invested \$300,000 in new machinery including scanning and diagnostic equipment, Car-O-Liner bench/rack and CarTronic Electronic 3Dimensional measuring system. New automation requires workers be trained on technological and process improvement skills for efficiency and productivity.

Furthermore, the auto industry is experiencing changes due to Smart Systems such as lane-keeping, anti-roll, pacing and active park assist systems. These new features require staff training on service and repair of these systems. Training will provide staff with the skills and equipment knowledge needed to be successful.

### **Retrainee - Job Creation**

The Panel offers incentives to companies hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

MSWest recently expanded by purchasing two new facilities in November of 2017. Each facility is approximately 20,000sq and have each been outfitted with new scanning and diagnostic equipment, Car-O-Liner bench/rack's and CarTronic Electronic 3Dimensional measuring systems. MS West's new locations are expected to increase business capacity by 10% in the first year. To support company growth, the Company has committed to hiring 33 new full time permanent employees (Job Number 2). The new positions will fill staffing needs for both locations.

### **Training Plan**

MSWest will provide 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 in Customer Care Skills, Customer Engagement, Understanding Finance and Operational Metrics, Conflict Resolution and Educating the Consumer. Training topics will increase customer satisfaction and knowledge of business processes.

**Commercial Skills:** Training will be offered to Technicians, Parts Specialists and Estimators to emphasize safe operation and proficiency of equipment. Training topics include Fuel Systems Repair, Exhaust Systems, Root Cause Analysis and Lean Process and Integration. Training will ensure consistency in repair procedures across all facilities.

**Computer Skills:** Training will be offered to all occupations in Certified Collateral Corporation (CCC) ONE Software, Mechanical Estimating, and Parts Trader-Parts Procurement Software.

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

MSWest requests up to 40 hours of PL-Commercial Skills training for 68 Technicians and Parts Specialists to supplement Class/Lab training. PL training will enable workers to train on actual projects. Trainees will use the following equipment in PL training: resistance spot welder, metal inert gas welder, measuring system, paint spray gun, estimating system and various hand tools. Staff will be trained on welding of structural parts, aluminum repair, body filler methods, and color tinting and blending. This training will be at a much slower pace than regular production and will provide 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. The trainer will attest to the trainee's competency once training is completed. This training will strengthen employee understanding of how to complete automotive collision repair services.

Training will be under constant supervision with a 1:1 trainer-to-trainee ratio.

### **Commitment to Training**

The Company's current annual training budget is approximately \$150,000 per year. Training programs include new hire orientation, sexual harassment prevention, safety and computer skills 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

MSWest's Corporate Business Manager (CBM) will oversee the training plan and work directly with department leads to implement training. A training coordinator will schedule and coordinate training efforts for staff and an administrative assistant will work with trainers on all training record keeping documents. Also, MSWest has retained Synergy Management Consultants, LLC (SMC) to assist with administrative requirements. A training plan is in place and will begin upon approval.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

SMC of Grass Valley assisted with development services for a flat fee of \$2,400.

### **ADMINISTRATIVE SERVICES**

SMC will also perform administrative services 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**

- Best Practices Implementation
- Coaching
- Collaborative Leadership
- Conflict Resolution
- Creating Business Strategy
- Customer Care Skills
- Customer Engagement
- Direct Repair Partner Management
- Educating the Consumer
- Motivating Employees
- Overcoming Objections
- Presentation Skills
- Quality Assurance
- Sales Procedures and Strategies
- Team Building
- Understanding Finance and Operational Metrics

**COMPUTER SKILLS** (Advanced/Intermediate Only)

- All Data Application
- Car-O-Liner Measuring Software
- Certified Collateral Corporation ONE Software
- CRM/HR Software
- Mechanical Estimating
- Mitchell Estimating
- MS Office Suite
- Original Equipment Manufacturer (OEM) Repair Process Retrieval
- Parts Trader - Parts Procurement Software
- Repair Scanning Software
- Sage Accounting
- VOC Tracking

**COMMERCIAL SKILLS**

- 3 Stage Refinishing Process
- 3D Measuring Systems
- AC Systems
- Active Lane Keeping Systems
- Adhesive Bonding
- Advanced Materials and Composite Repair
- Aluminum Bonding and Structural Repair
- Aluminum Tools and Minor Repair
- Collision Repair Skills
- Color Theory and Matching Principles
- Drive Systems
- Emergency Clean Up Procedures

- Engine Repair/Replacements
- Estimating Hybrid and Electrical Vehicles
- Estimating Mechanical and Electrical Systems
- Estimating Steering and Suspension Damage
- Exhaust Systems
- Fuel Systems Repair
- Handling Chemicals and Clean Up Procedures
- Hybrid and Electric Repair
- Hybrid Vehicle Battery/Charging Systems
- ICAR Collision Repair/Refinish Skills
- Just-In-Time Inventory Control/Protocol
- Lean Process and Integration
- Maintenance Repairs
- Managing MSDS Sheets
- OEM Certification
  - BMW
  - Ford
  - General Motors
  - Honda
  - Toyota
  - Volkswagen
- Paint Spray Gun Set-Up and Maintenance
- Pillars and Rail Replacement
- Plastic and Composite Repair
- Problem Solving and Decision Making Skills
- Product Knowledge
- Refinish Skills
- Resistance Spot Welding
- Root Cause Analysis
- Steering, Suspension and Mechanical Systems
- Surface Preparation
- Transmission Diagnosis and Repair
- Vehicle Priming and Sealing

### **Productive Lab Hours**

0-40

#### **COMMERCIAL SKILLS** (Ratio 1:1)

- 3D Measuring Set-Up/Analysis
- Aluminum Bonding
- Aluminum Repair
- Aluminum Welding
- Body Filler Methods
- Color Blending
- Color Tinting
- Estimating Advanced Materials Composite Structure
- Estimating Advanced vehicle systems
- Estimating Diagnosis
- Estimating DRP Procedures New Tech
- Metal Inert Gas Brazing

- Paint Spray Gun
- Resistance Spot Welding
- Rivet Bonding
- Scanning Analysis
- Structural Corrections with 3D Measuring
- Structural Welding

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



**TRAINING PROPOSAL FOR  
PURITAN BAKERY, INC.  
17-0926**

**Panel Meeting Date:** 03/23/2018  
**Regional Office:** North Hollywood Regional Office  
**Analyst Name:** Marisol Niquet  
**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.

<b>TOTAL ETP FUNDING:</b>		<b>\$ 77,040.00</b>	
<b>Program &amp; Admin Cost</b>	<b>Support Cost (\$)</b>	<b>Substantial Contribution (\$)</b>	<b>Total In-Kind</b>
\$ 77,040.00	N/A	\$ 0.00	\$ 214,000.00

**APPLICANT PROFILE**

<b>Company Summary</b>	Founded in 1938 and headquartered in Carson, Puritan Bakery, Inc. is a family-owned full service bakery that manufactures quality buns and breads.
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<b>Industry Sector(s)</b>	Manufacturing		
<b>Priority Industry</b>	Yes		
<b>No. Employees (Applicant)</b>	<b>State:</b> 274	<b>US:</b> 274	<b>World Wide:</b> 274
<b>Turnover Rate (Applicant)</b>	1.00 %		
<b>Repeat Contractor</b>	No		
<b>High Unemployment Area</b>	Yes		
<b>Union(s)</b>	Bakery Confectioners / Local 31; Teamsters / Local 572		

## **TRAINING PROFILE**

<b>Training Objective(s)</b>	The training provides employees the needed skills to efficiently manage growth and customer requirements.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

<b>#</b>	<b>Group Characteristics</b>	<b># Of Trainees</b>	<b>Reimbursement Rate</b>	<b>Weighted Avg. Hours</b>	<b>Cost Per Trainee</b>	<b>Min-Max Hours</b>
1	Retrainee	107	\$ 18.00	40	\$ 720	8 - 200



# PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

## 1. Company Background

Founded in 1938 and headquartered in Carson, Puritan Bakery, Inc. (Puritan Bakery) is a family-owned full service bakery that manufactures top quality buns and breads. Best known for its hamburger buns, the Company offers a wide variety of quality bakery products. The Company caters to customers by customizing products to exact specifications. Whether a small business requiring a limited amount of Puritan's bakery goods, or a large chain requiring a regular delivery of products. Puritan Bakery's, multiple locations provide direct store delivery to customers throughout California, Nevada and Arizona.

Customers include restaurants, hotels, hospitals, schools, meal plans, government entities, corporate offices, event centers, and wholesale grocery chains.

## 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

Puritan Bakery has recently purchased and installed a new production line, consisting of a new oven, cooler and control systems. The production line will increase production and lead to additional product offerings, creating a more diverse production and delivery business.

Training will support the Company in meeting quality, production and customer requirements. With the installation of the production line, quality control will continue to be the focus of the organization, and overall productivity will move to a higher level. Training will enable the Company to grow, retain employees, and establish a high performance workplace with improved company operating procedures.

The Company plans to train 107 trainees over the next 21 months. Training will help meet production quality and customer requirements by improving the productivity of its employees. Manufacturing Skills training will be offered to frontline production and Manager occupations. The training will focus on production equipment, manufacturing procedures, production techniques, and equipment maintenance.

Computers Skills training will be offered to the office staff and sales occupations in order to support productivity improvements and improve current job functions, as well as adapt to new ones. Office staff will receive training on Microsoft Office package and SAGE accounting software that will be used to integrate the new

## PROPOSED TRAINING PROJECT DETAILS

	<p>equipment with the current systems. Sales staff will receive computer training to assist them in the production of computerized reports and to handle special orders.</p> <p>Continuous Improvement training will also be offered to all occupations and will move the Company to a higher level of performance through training in process improvement, meeting customer needs, resolving production problems and inspection procedures. This training will help reduce production problems while improving product quality and improving delivery times.</p> <p>Training will take place at the Company's location in Carson and will be delivered by a combination of in-house subject matter experts and vendors to be identified during the contract term.</p>
<b>Training Infrastructure and Administrative Plan</b>	<p>Puritan Bakery spends an estimated \$90,500 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 internal lead personnel to oversee training delivery, scheduling, and tracking. The Company has also retained an administrative subcontractor to ensure that training, administration and documentation adhere to ETP requirements.</p>
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A
<b>Substantial Contribution Description</b>	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
<b>Summary</b>	
All occupations will receive training in Computer Skills and Continuous Improvement (Attachment 2).	
Operational Staff and Managers will receive training in Manufacturing Skills (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

The applicant has retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Downey Smith & Fier	Lakewood	N/A
Administrative	Downey Smith & Fier	Lakewood	13%
Training	TBD	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>
<b>Training Type (Level)</b>	<b>Planned Course Offerings</b>
Computer Skills (Standard)	Computerized Reports
	Handling Special Orders
	Intermediate/Advanced MS Office Applications
	SAGE Accounting Software
Continuous Improvement Skills	Advanced Safety Training
	Ingredient Training
	Meeting Customer Needs
	Process Improvement
	Quality Control Procedures
	Resolving Production Problems
Manufacturing Skills (ME) (Standard)	Equipment Maintenance
	Food Safety
	Manufacturing Procedures
	Operating Procedures
	Production Equipment
	Production Techniques
	Quality Control



# LOCAL NO. 31

*Bakery, Confectionery, Tobacco Workers & Grain Millers*

• INTERNATIONAL UNION •



PHONE (310) 327-3000  
FAX NUMBER (310) 327-6091  
450 CARSON PLAZA DR., SUITE #C  
CARSON, CA 90746-3299

November 11<sup>th</sup>, 2017

Employment Training Panel  
4640 Lankershim Blvd.  
Suite #311  
North Hollywood, CA 91602

Re: Application to Employment Training Panel for Puritan Bakery.

Dear Mr. Mazzone,

The BCTGM Local #31 represents employees at Puritan Bakery's facility. We support the training of the workforce as it improves upon the skills of the workers we represent. Therefore, BCTGM #31 supports Puritan's application for funding from the Employment Training Panel.

Best regards,

Doyle Townson

Secretary-Treasurer

*Make the Right Choice ... Buy Union Bread*



RICK MIDDLETON  
SECRETARY-TREASURER

**TEAMSTERS LOCAL UNION NO. 572**  
**CHAUFFEURS, SALES DRIVERS AND HELPERS**

AFFILIATED WITH THE INTERNATIONAL BROTHERHOOD OF TEAMSTERS

450 E. CARSON PLAZA DRIVE, SUITE A • CARSON, CALIFORNIA 90746-3288 • (310) 515-0801 / FAX (310) 515-0942

November 1, 2017

Marisol Niquet  
Contract Analyst  
North Hollywood Regional Office  
4640 Lankershim Blvd., Ste 311  
North Hollywood, CA 91602

**Re: Teamsters Local Union 572 and Puritan Bakery**

Dear Ms. Niquet:

Teamsters Union Local 572 represents members employed at several Puritan Bakery locations.

As an advocate of safe and efficient worksites, Local 572 supports employer training programs that improve the skill and performance of its employees. Therefore, Local 572 supports Puritan Bakery's application for funding from the Employment Training Panel.

Sincerely,

Dennis E. Watson  
President  
Teamsters Local Union 572



**Retrainee - Job Creation  
Training Proposal for:**

**Steve's Oilfield Service, Inc. dba SOS Crane & Trucking**

**Small Business**

**ET18-0194**

**Panel Meeting of:** March 23, 2018

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

**CONTRACTOR**

- Type of Industry: Services
  
  - Number of Full-Time Employees  
California: 65  
Worldwide: 65  
Number to be trained: 66
  
  - Out-of-State Competition: No OSC
  - Special Employment Training (SET):  Yes  No
  - High Unemployment Area (HUA):  Yes  No
  - Turnover Rate: 15%
  - Repeat Contractor:  Yes  No
- Priority Industry:  Yes  No
- Owner  Yes  No

**FUNDING**

- Requested Amount: \$72,600
- In-Kind Contribution: \$110,936

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET	Business Skills; Commercial Skills; Computer Skills; Continuous Impr	19	8-60	0	\$1,100	\$30.36
				Weighted Avg: 50			
2	Retrainee SET HUA	Business Skills; Commercial Skills; Computer Skills; Continuous Impr	35	8-60	0	\$1,100	*\$12.53
				Weighted Avg: 50			
3	Retrainee SET Job Creation	Business Skills; Commercial Skills; Computer Skills; Continuous Impr	12	8-60	0	\$1,100	*\$14.62
				Weighted Avg: 50			

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

- Reimbursement Rate: Job #'s 1-3: \$22 SB Non-Priority
- Counties: Los Angeles, Kern
- Occupations to be Trained: Shipping and Receiving, Crane Operator, Truck Driver, Spotter, Signalman, Administrative Staff
- Union Representation:  Yes  
 No
- Health Benefits: Job #'s 1 and 3: Up to \$2.26 per hour

**SUBCONTRACTORS**

- Development Services: Training Funding Source (TFS) in Seal Beach assisted in the development of this ETP proposal for a flat fee of \$3,900.
- Administrative Services: TFS will provide administration services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 1989, Steve's Oilfield Service, Inc. dba SOS Crane & Trucking (SOS Crane) ([www.soscrane.com](http://www.soscrane.com)) is a crane and transportation company that provides services to the oilfield, construction and energy industries. SOS Crane dispatches trucks (consisting of 19 Ton Cranes, Winch Trucks and Straight Trucks) 24 hours a day, 7 days a week as a service. The Company operates in two locations in California, Signal Hill and Bakersfield. Employees from both locations will participate in this training proposal.



## Need for Training

SOS Crane recently purchased new equipment including Electronic Logging Devices through telematics, Fleet Management Software, and iPhones and iPads for vehicles. Training on new equipment will allow employees to offer customer deliveries and services with high efficiency. ETP funds will also allow the Company to implement a training program and establish a training culture. The Company will provide structured and formal training to improve performance, customer service and sales.

## Retrainee - Job Creation

In support of Job Creation, the Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage. SOS Crane has committed to hiring 12 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.

SOS Crane is expanding operations throughout California. In anticipation of the Company's expansion plans, SOS Crane will recruit, hire, and train 12 new employees over the next two years to fill positions in both the Bakersfield and Signal Hill facilities. These new positions will support the growing workload in different department due to expanding business operations. Training will help newly-hired personnel perform efficiently.

## Training Plan

**Business Skills:** This training will be offered to Administrative Staff and Shipping and Receiving. Training will develop employee skills and confidence to increase understanding of products and processes and improve communication. This will result in reduced production errors and better customer service.

**Commercial Skills:** This training will be offered to all occupations. Trainees will learn correct procedures in operating various equipment. Skills acquired will reduce errors and will result in a reduction in operating cost.

**Computer Skills:** This training will be offered to all occupations. Training will focus on Telematics Fleet Management. Trainees will use this new software to respond and provide service. Training will also include proper use of navigation and other electronic devices required to performing duties.

**Continuous Improvement:** This training will be offered to all occupations. Training will focus on process improvement, operations and system analysis.

## Commitment to Training

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

### ➤ Training Infrastructure

SOS Crane has a detailed training schedule in place and is ready to start training upon approval. Training will be provided by qualified internal trainers. The Company's Business Development Manager and an administrative assistant from the main branch, along with

Training Coordinators from each facility (Signal Hill and Bakersfield) will coordinate, facilitate and oversee all the aspects of training. Each facility's Training Coordinator will communicate directly with the administrative assistant at the main branch on a monthly basis to reconcile training records. In addition, SOS Crane has retained an administrative subcontractor, Training Funding Source, to assist with development and administration of this ETP project.

### **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
- Inventory Control
- Leadership
- Time Management

**COMMERCIAL SKILLS**

- Equipment Operations
- Freight Loading, Unloading
- HazMat Operations
- Job/Work Site Procedures
- Shipping and Warehousing

**COMPUTER SKILLS**

- Reports
- Telematics Fleet Management
- Electronic Logs
- Workplace IPad/iPhone Training
- Microsoft Office

**CONTINUOUS IMPROVEMENT**

- Business Process Improvement
- Operations and Systems Analysis

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

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.



## RETRAINEE - JOB CREATION

**Training Proposal for:**

**L-3 Electron Devices, Inc.**

**Agreement Number: ET18-0189**

**Panel Meeting of:** March 23, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Webb

### PROJECT PROFILE

<b>Contract Attributes:</b>	Retrainee Priority Rate Job Creation Initiative Critical Proposal	<b>Industry Sector(s):</b>	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<b>Counties Served:</b>	Los Angeles	<b>Repeat Contractor:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<b>Union(s):</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Cabinet Makers, Millimen, and Industrial Carpenters Union Local 721		
<b>Number of Employees in:</b>	CA: 5,000	U.S.: 32,000	Worldwide: 38,000
<b>Turnover Rate:</b>	4%		
<b>Managers/Supervisors:</b> (% of total trainees)	7%		

### FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$898,104</td></tr> </table>	Program Costs	\$898,104	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(Substantial Contribution)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(Substantial Contribution)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(High Earner Reduction)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(High Earner Reduction)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;"><b>Total ETP Funding</b></td></tr> <tr><td style="text-align: center;">\$898,104</td></tr> </table>	<b>Total ETP Funding</b>	\$898,104
Program Costs														
\$898,104														
(Substantial Contribution)														
\$0														
(High Earner Reduction)														
\$0														
<b>Total ETP Funding</b>														
\$898,104														

<b>In-Kind Contribution:</b>	100% of Total ETP Funding Required	\$1,375,500
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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	Business Skills, Computer Skills, Continuous Improvement, Mgmt. Skills, Mfg. Skills, Adv. Tech. Skills	422	8-200	0	\$1,332	\$17.54
				Weighted Avg: 74			
2	Retrainee Job Creation Initiative	Business Skills, Computer Skills, Continuous Improvement, Mgmt. Skills, Mfg. Skills, Adv. Tech. Skills	140	8-200	0	\$2,400	*\$14.62
				Weighted Avg: 120			

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

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

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Production Staff		220
Administration Staff		29
Engineer I		75
Engineer II		50
IT Staff		8
Manager/Supervisor		40
<b>Job Number 2 (Job Creation)</b>		
Production Staff		135
Engineer		5

## **INTRODUCTION**

Founded in 1948, L-3 Electron Devices, Inc., ([www.L3t.com](http://www.L3t.com)) (L-3) manufactures high reliability communication satellites and subsystems to commercial, space, and defense customers worldwide. The Company's parent company is L-3 Technologies, headquartered in New York, New York. L-3 has a total of 76 facilities located in 20 states. California locations include Anaheim, Carlsbad, Folsom, Goleta, Menlo Park, Poway, San Carlos, San Diego, San Leandro, Santa Rosa, Simi Valley, Spring Valley, Sylmar, and Torrance. Products manufactured at the Torrance facility include satellite RF amplifiers, microwave electron devices, and other related products. This will be the Company's second ETP Agreement, its second in five years.

This project has been designated as a Critical proposal based on L-3's planned business expansion and commitment to adding new jobs in California. This project is supported by the Cabinet Makers, Millimen, and Industrial Carpenters Union Local 721 represents workers in this proposal. A letter of support has been provided.

In the aerospace market, L-3 serves both the government and commercial segments. In the defense market, the Company provides products critical to the Airborne and Surface Radar, Military, and Commercial Communications and Instrumentation segments. Products include Electric Propulsion, Electronics Power Conditioners, Traveling Wave Tubes (TWT's) and Amplifiers, Microwave Power Modules, Crossed-Field Amplifiers, and Electron Emitters, Klystrons, Magnetrons, and Thratrons. With hardware on more than 180 satellites and over 450 million TWT operating hours in orbit, L-3 product lines have proven to be reliable.

The L-3 Torrance location manufactures and tests electronic products. The facility designs and provides high performance/high reliability products to customers in the Space and Defense Industry. The facility is equipped with modern tools that support design thru volume production and utilize certified AS91000 quality management systems.

## **PROJECT DETAILS**

Under this proposed project, staff will learn skills to manufacture Low Earth Level (LEL) and Mid Earth Level (MEL) satellites. Customers include military and commercial companies such as Netflix to help improve data streaming. Training will increase employee skills to design, fabricate and test new products. Over the next 1-2 years, the Company will add new staff to its defense production in an effort to manage increased productivity levels.

Trainees will receive computer software training, root cause and corrective action training, and contract insight design training. Course topics will introduce staff to new technology, as well as cross-train workers. Additional topics will cover L-3 manufacturing processes such as Laser Welding, Space Crimp Certification, Capacity Planning and Management, and Assembly (Barrel, Circuit, Rod, Gun Body, and EPC).

Under the prior project, L-3 was able to compete with European competitors for projects, growing its market share from 20% to 60%. Training under the prior Agreement vastly improved L-3's ability to negotiate and problem-solve, becoming a leader in domestic and offshore markets. No trainee will receive duplicate training under this training proposal.

### **Training Plan**

Training will be delivered by in-house instructors.

**Business Skills:** Training will be offered to all occupations to increase employee skills and knowledge, as well as gain a competitive advantage over European competition.

**Computer Skills:** Training will be offered to Managers/Supervisors, Administration, Engineering, and Production Staff in need of intermediate and advanced Microsoft Office. Training will increase staff capabilities to become more effective in the use of sophisticated software.

**Manufacturing Skills:** Training will be offered to Production Staff and all newly hired workers to ensure they are competent in technical and production techniques.

**Continuous Improvement:** Training will be offered to all occupations to provide staff the skills to resolve problems and correct situations as they occur on the production floor and during business operations. Process improvement skills such as operational excellence and leadership training will be essential for growth and to gain new market share.

**Advanced Technology:** A total of 138 Engineers and IT Staff will participate in Advanced Technology training (AT) to ensure staff is up-to-date on new 3-D technologies. Training will improve design capabilities and increase engineering skills by utilizing state-of-the art software and methods. Trainees will receive up to 90 training hours on Thruster Physics, Modeling Workshops, and XPC Design Fundamentals. The trainer-to-trainee ratio is 1:10 for AT, to allow in-depth coverage and personal attention from the instructor.

### **Commitment to Training**

L-3 spends approximately \$728k annually on training per facility. Employees currently receive leadership development, quality, new hire, ethics, and operational training. Topics include job specific and companywide 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

L-3 has dedicated Human Resource staff members to oversee the daily issue and collection of training rosters. The Company has also hired a third party administrator, California Training Coalition, to provide administrative services.

### **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.

L-3 has committed to hiring 140 new employees (Job Number 2). These positions will be net new union positions for the Torrance facility (Job Creation). These newly created positions will receive Manufacturing Skills Training to learn L-3 production processes and increase overall knowledge on company satellites and other products such as Electric Thrusters and power processing units. Newly hired workers will expand L-3's business capacity, creating new production lines to manufacture LEL and MEL satellites (Project Details). 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.

### **Substantial Contribution**

Under the prior ETP Agreement (ET16-0275) L-3 earned a total of \$349,500. For the Torrance facility however, \$114,597 was earned for Job Creation. Thus, L3 has not earned \$250K at the Torrance facility. Therefore, substantial contribution is not required for this training proposal.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

The following table summarizes performance by L-3 under an ETP Agreement that was completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0275	Torrance	01/04/16- 01/03/18	\$349,500	\$349,500 (100%)
ET12-0345	Folsom	03/26/12- 03/25/14	\$349,848	\$208,140 (59%)

**ET12-0345:** L-3 Division in Folsom experienced an unexpected and significant change in leadership during the ETP contract period. This resulted in delayed start of training and lower performance.

**DEVELOPMENT SERVICES**

L-3 retained California Training Coalition in Upland to assist with development of this proposal for a flat fee of \$21,500.

**ADMINISTRATIVE SERVICES**

California Training Coalition 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**

- **EDD Business Acumen & Processes**
  - Protecting Proprietary Information
  - Basic & Advanced Blueprint Reading
  - Business Capture
  - Doing Business Overseas
  - Key Account Management/CRM
  - FAR Training
  - Business Acumen
  - Product Substitution
  - Anti-Corruption
  - Conflicts of Interest
  - Export Controls (ITAR)
  - Material Review Activities
  - Project Management
  - Purchase Order Management
  - Proposal Management
- **EDD Product Knowledge**
  - Rework Instructions
  - Router/Rework Router Inputs & Review
  - Single/Sole Source Justification
  - Sourcing Strategies
  - Terms & Conditions/Flow Downs
  - Understanding Bills of Materials
  - Understanding Capacity Requirements Planning
  - Engineering Print Reading
  - Geometric Dimensional Tolerancing (GDT)
  - Dimensional Tolerancing for Tooling
  - Introduction of Electric Propulsion
  - Design Center Request System
  - Satellite Conferences
  - FAR Basics
  - Forecasting
  - Fundamentals of Purchasing
  - Intro to Categorizing Purchase and Supplies
  - Managing and Improving Supplier Performance
  - Master Scheduling Foundations
  - Program Management College
  - Earned Value Management
  - Production Planning

**COMPUTER SKILLS**

- **EDD Software**
  - Propricer

- Contract Insight Design Training
- Altium/Meridian Software
- EDD Enterprise Resource Planning Software
  - Infor LN
  - Oracle
  - Infor/Bahn
  - Managing with MRP
- MS Office
  - Project
  - Publisher
  - Visio
  - Advanced Word/Excel

### **CONTINUOUS IMPROVEMENT**

- EDD Leadership Skills
  - Performance and Talent Management
  - Financial Acumen
  - Supervisory, Leadership, and Influence Skills
  - Negotiation
- EDD Operational Excellence
  - Root Cause and Corrective Action
  - Root Cause Analysis & FRBs
  - Problem Solving – 5 Whys
  - Corrective Action Review Board
  - Process Improvements
  - Six Sigma Training
  - ISO 9001 Revision 2015
  - AS9100D
  - Internal Auditing
  - Quality Management Review
  - Statistical Process Control
  - Program Reviews
  - Material Review Board Cert. (MRB)
  - Product Knowledge
  - CMM Operations

### **MANUFACTURING SKILLS**

- EDD Safety
  - FOD Control
  - Electrical Safety
- EDD Test Skills
  - Test Readiness Review
  - Prohibited Material Testing
  - Equipment Calibration
  - 1<sup>st</sup> RF/Age
  - 2<sup>nd</sup> RF/Mid-Test
  - 60Kv CPE Modulators
  - Bench Thermal/ H-C Screen

- Burn-In
- Collector Supply, DC Console
- DC Console
- EMI/EMC Testing
- EPC Thermal Test
- Fill Out and Maintain ROL's
- Final Functional Bench Testing
- Fowler/Ion Argon
- Glassman Supply
- HAC Modulators
- Heater Testing
- Hi Potter
- HVM Test
- Integration Test
- Old Burn In
- Orifice testing
- Participate in TRI process
- Pre Age
- Quick Turn-On Test
- Repair Old Equipment
- RS/RE
- Run ATE tests
- Schematic / Test Expertise
- Select In Test (SIT)
- Solenoid Supply, Patriot
- Thermal Vacuum Chamber Set up
- Thermal Vacuum Data Monitoring
- Thermal Vacuum Unit Install
- Thermal Vacuum Testing
- Thruster Integration Testing
- Troubleshoot Test Problems
- TWTA ATE Station Setup
- TWTA ATE Testing
- Vibration Set up
- Vibration Unit Install
- Vibration Testing
- Thruster ATP Test
- XPC Module Test
- XPC Control Unit Test
- XPC Integration Test
- LabView Training
- Automated Test Equipment Training
- EDD Manufacturing Processes
  - Energy Management System
  - Fire Life Safety
  - AutoCAD: Tooling / Drawing Expertise
  - Operator and Tester Training
  - Potting molds, chambers & technique
  - Electrical Static Discharge (ESD)
  - Space Crimp
  - Resistance Spot Welding
  - Laser Welding
  - GTAW Welding

- Controlled Work Area (CWA)
- Electronic Assembly Solder Certification
- Coating Certification per MPI/MPS 6-47
- Compressed Gases
- Connector Mate/De-Mate
- 01327 Material Review Activity (MRA)
- 01523 Personal Protective Equipment Training
- 01794 Gen Elec Solder Inspection Cert
- 01803 Space Crimp Certification
- 01833 Resistance Spot Welding Cert
- 01867 Laser Welding Cert
- 01868 GTAW Welding Cert
- 02023 Borescope Training
- 02217 Chromate Conversion Coating
- 01847 RF Conn./Waveguide Mate/De-Mate Training
- Aggregate Operations Planning
- APICS Basics of Supply Chain Management\*
- APICS Certified Supply Chain Professional (CSCP)\*
- APICS Detailed Scheduling and Planning\*
- APICS Master Planning of Resources\*
- APICS Strategic Management of Operations\*
- Basics of Material Requirements Planning (MRP)
- Best Value Determination
- Capacity Planning and Management
- Change Board Knowledge
- CPSM: EX 1 - Review Course Foundation of Supply Mgmt
- Demand Management
- Documentation Requirements
- EMI
- MES User
- Assemble High Complex Modules
- Assemble High Complex PWB Assys
- Assembly of high voltage module
- Barrel Assembly
- Basing - Conduction
- Basing - Radiation
- Black Epoxy
- Black Silicone Adhesive
- Bonding 6-38
- Bonding 6-58
- Chemical Use
- Circuit Bundle
- Circuit Extraction
- Circuit Shrink Assembly
- Circuit Window Assembly
- Clean Prior to Ship
- Collector Assembly
- Connector Installation
- Copper Removal Process

- Crimping
- Degrease
- Endcap
- EPC Assembly
- EPC Cover
- EPC foldup
- Fabrication of New Equipment
- Fasteners
- Fin Installation
- Final Circuit Assembly
- Final Gridded Gun Assembly
- Final Gun Assembly
- Final Vacuum Assembly
- Furnace MPI ALL
- Gray Overcoat
- Grids ALL
- Grit Blast
- GTAW
- Gun Body Assembly
- Heater Assembly
- Helix Assembly
- High Resistance and Inspection
- Hi-Vac
- Impregnation and Chem Etch Process
- Inner Gridded Gun Assembly
- Inner Gun Assembly
- Install Covers
- Laser Weld
- Lead Prep
- Lead Soldering
- Leak Check
- Lower Level Sub Assemblies
- Magnet Stack
- Magnetism Breakout Process
- Magnetism Core and Bracketing
- Magnetism Endwall Encapsulation
- Magnetism Heat Strap Bonding
- Magnetism Scotchcast Potting
- M-Coat Process
- Measurement Tools
- Mo-Ni Process
- Mo-Ru Braze Process
- Mo-Ru-N Braze Process
- Operations II A/T
- Packing and Potting Process
- Painting
- Part Cleaning Process
- Pinch Off
- Potting
- Pre and Post Cover Cleaning
- Pre-Cover Inspection
- Power Curve Operation
- R.F. Braze

- Radiators
- Red Stake
- Resistance and Inspection
- Resistance Spot Weld
- Rod Assembly
- SEM Photo
- Silver Epoxy
- SMT Assembly
- Sputter Coat
- Standard Repairs
- Straighten 1792H TWT
- Subassembly
- Thruster Assembly
- Thruster Install
- Thruster Removal
- Tube Prep
- TWT Integrate
- TWT Prep
- Vacuum Subs
- Waveguide - Subassemblies
- Waveguide Installation Ku, K
- Waveguide Installation X
- Welding Process
- Wet Lab Chemical Mix, Etch, Clean
- Wetstack
- Windows, Subs & Finals
- Window Sub Assembly

### **AT Hours (limited Ratio 1:10)**

8-200

### **ADVANCED TECHNOLOGY SKILLS**

- PC DMIS (CMM Software)
- VIC & Leak checkers
- Creo (Pro-E)
- Introduction to Pro/E
- Confluence/Jira
- LabView/CCATE
- Altium 3D PWBs
- WindChill PDMLink
- 3D Printer hardware/ Software
- Power Conversion Fundamentals
- Digital Circuits and Devices
- Circuit Modeling & Worst-Case Analysis
- High Density Circuit Board Technology
- Product Design & Development
- Thruster Physics
- XPC Design Fundamental
- TWTA Fundamentals
- Modeling Workshops

- AI /OIB / Router Construction
- M&P MPS / MPI Expertise
- Production / Process Design Expertise

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



**CABINET MAKERS, MILLMEN AND INDUSTRIAL CARPENTERS LOCAL 721**

January 22, 2018

Employment Training Panel Members  
1100 J Street, 4<sup>th</sup> Floor  
Sacramento, CA 95814


Subject: L3 Technologies, Electron Devices Proposal

Dear Panel Members,

Cabinet Makers, Millmen, and Industrial Carpenters Local Union 721 represent all production, maintenance, and shop clerical employees at the L3 Technologies, Electron Devices facility in Torrance, California.

It is our understanding that L3 Technologies, Electron Devices is applying for ETP training reimbursement funds in order to improve the efficiency, skills, and competitiveness of the organization and it's employees, including the bargaining unit employees we represent. Please be advised that we support the application. We view this training program as a step towards ensuring the continued viability and competitiveness of the L3 Electron Devices Torrance facility, as well as, improving the marketability of our members.

Sincerely,

 1-23/2018

Craig Garriott  
Business Representative  
Local Union 721





**Retrainee – Job Creation  
Training Proposal for:**

**The Spaceship Co., LLC**

**Agreement Number: ET18-0182**

**Panel Meeting of:** March 23, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** E. Wadzinski

**PROJECT PROFILE**

Contract Attributes:	Job Creation Initiative Retrainee Priority Rate Veterans HUA	Industry Sector(s):	Manufacturing Aerospace and Defense  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Kern	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: 455	U.S.: 455	Worldwide: 455
<u>Turnover Rate:</u>	1%		
<u>Managers/Supervisors:</u> (% of total trainees)	14%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$653,000		\$0	\$0		\$653,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$879,562
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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. Technology, Business Skills, Computer Skills, Cont. Improv., HazMat., HAZWOPER, Mfg. Skills, PL-Mfg. Skills	435	8-200	0-43	\$1,080	\$16.70
				Weighted Avg: 60			
2	Retrainee Job Creation Initiative	Adv. Technology, Business Skills, Computer Skills, Cont. Improv., HazMat., HAZWOPER, Mfg. Skills, PL-Mfg. Skills	100	8-200	0-43	\$1,700	*\$13.66
				Weighted Avg: 85			
3	Retrainee Veterans	Adv. Technology, Business Skills, Computer Skills, Cont. Improv., HazMat., HAZWOPER, Mfg. Skills, PL-Mfg. Skills	10	8-200	0-43	\$1,320	\$16.70
				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 for Kern County;  
Job Number 2 (Job Creation): \$13.66 for Kern County; and  
Job Number 3 (Veterans): \$16.70 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 for Job Numbers 1 & 3, and \$1.66 for Job Number 2 may be used to meet the Post-Retention Wage.

<b>Wage Range by Occupation</b>		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>JOB NUMBER 1 (RETRAINEE)</b>		
Engineers		97
Technicians		203
Customer Service		55
Administration		15
Supervisor/Manager		65
<b>Job Number 2 (Job Creation)</b>		
Engineers		20
Technicians		50
Customer Service		10
Administration		10
Supervisor/Manager		10
<b>Job Number 3 (Veterans)</b>		
Engineers		8
Supervisor/Manager		2

## **INTRODUCTION**

The Spaceship Co., LLC (TSC) ([www.thespaceshipcompany.com](http://www.thespaceshipcompany.com)), founded in 2005, is wholly owned by Galactic Ventures. Headquartered in Mojave Air and Space Port in Mojave, the Company has two additional facilities in Mojave. Training under this Agreement will only include trainees at the Company headquarters and their additional facility located in Mojave. This will be TSC's first ETP Agreement.

TSC delivers aerospace solutions. The Company's services include preliminary vehicle design and analysis, manufacturing, ground testing, flight testing and post-delivery support. TSC is building and testing a fleet of WhiteKnightTwo Carrier aircraft and SpaceShipTwo reusable spaceships; which together, form Virgin Galactic's human spaceflight system. TSC is also developing and manufacturing the propulsion systems for these vehicles. TSC designs and manufactures their own tools, parts, avionics, electronics, flight and test software and assembly of nearly all vehicles that they build.

From 2016 through 2017, TSC added 185 new jobs to support their business and build the current SpaceShipTwo, which is now in the test flight stage. As the Company is moving forward in building a fleet of SpaceShipTwo and WhiteKnightTwo aircrafts being made to order, TSC is doubling their build processes by building two vehicles simultaneously. As the manufacturing of these space vehicles progresses, TSC will need to add jobs to support the manufacturing and servicing of their products.

## **Retrainee - Job Creation**

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

To support business growth, the Company anticipates hiring 200 new employees within the next two years. As part of this proposal, TSC has committed to hiring 100 new employees to work at their Mojave facilities. This expansion requires additional workforce support at all levels. TSC will train these employees to meet various business needs which include product development, manufacturing, services and support. Trainees will learn to produce and operate sophisticated equipment and technology systems, to better support business operations.

The date-of-hire (Job Number 2) will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

## **PROJECT DETAILS**

The need for training is driven by new business and customer demands, industry regulatory requirements, complex testing, and continued training and development. The manufacturing of additional SpaceShipTwo's and pursuit of additional business requires increased manufacturing and expansion of workforce capacity.

As the Company grows and technology advances, employees will need new and upgraded skills training. TSC has recently invested \$7M in materials and equipment that necessitate workforce training. Training will be needed for new Flight Test Software; as well as, Manufacturing and Test Equipment (CNC/Router Machines, Laser Trackers, Gauge Tools, Resins and various industry related Software Programs). TSC is also incorporating automation tools to streamline processes. Training will be provided to enable workers to maintain and operate new equipment. The Company is implementing new in-house software and a new Learning Management System that employees must learn to use.

ETP funds will help TSC deliver upgraded job skills and provide knowledge needed for trainees to adapt to new technologies and systems. Training will take place at the Company's facilities in Mojave. Training will be provided by in-house subject matter experts and vendors to be identified during the term of the proposed Agreement.

## **Training Plan**

Due to the highly technical nature of the processes and equipment, training ranges from 80-200 hours. Training will be delivered via Class/Lab, Computer-Based Training (CBT) and Productive Lab (PL) as outlined below:

**Business Skills:** This training will be offered to all occupations. Trainees will gain the knowledge and skills to improve customer service through Customer Service/Support, Logistics/Supply Chain, Product Knowledge, and Train-the-Trainer Skills courses in support of its engineering and manufacturing activities.

**Computer Skills:** This training will be offered to all occupations to support the business operations. Training will allow trainees to effectively use the Companies' complex systems to provide efficient and effective customer service, improve Inventory Control and implement necessary software including Oracle, Quality Systems, and Ultipro.

**Continuous Improvement:** This training will be offered to all occupations to improve quality and service to customers. Trainees will gain skills to increase performance in the following areas: Agile Product Lifecycle Management/Agile Project Management Skills, Engineering Change Processes, Lean Manufacturing Skills, and Process/Quality Improvement Skills.

**Hazardous Materials:** Training will be offered to Technicians and Engineers. This training will provide supplemental hazardous materials skills to frontline workers and lead personnel. Trainees will learn knowledge and techniques for handling hazardous materials and toxic substances associated with the Company's manufacturing processes.

**HAZWOPER:** Training will be offered to Technicians. Training will include site assessment; hazards elimination; methods; symptoms and preventable measures; proper handling of hazardous materials; explosive/radiological or flammable material-compound-mixtures; site control; risk exposure, and treatment of hazards exposure.

**Manufacturing Skills:** This training will be offered to Technicians, Engineers, Supervisors and Managers. Training will focus on spacecraft systems Integration, CNC Machine Operation and Programming, Gauges/Calibration to improve manufacturing quality and efficiency and improve panel assemblies. This training will enable employees to build spacecraft to meet rigorous airframe standards.

**Advanced Technology:** Training will be offered to Engineers, Technicians, Supervisors and Managers. This training is designed to provide technical and customized courses in composites fabrication/assembly, engineering, software design and programming, and high-voltage electronics.

This training is intended to foster a high level of innovation and product development expertise for spacecraft manufacturing and rocket development. These courses will cover leading-edge technologies to develop high-end composites fabrication/assembly, and software including: ANSYS Engineering Software, Advanced CAD/CAM Design Software for Components and Structures. Trainee knowledge and skill in Computer Aided Three-dimensional Interactive Application (CATIA) will reduce possible errors in spacecraft design and will save human life. Advanced Technology skills will enable Engineering Methods/Processes to be utilized in designing and building most advanced spacecraft and reduce in flight risks. Training may require the use of outside vendors and in-house specialists with expertise in these areas.

Advanced Technology (AT) training is costlier to deliver than more generalized computer-related subjects. The Company estimates that costs associated with this specialized training will likely range from \$50 to \$500 per hour, per trainee, depending on the subject matter. Delivery of AT requires expensive system/design equipment and complex software. The 1:10 trainer-to-trainee ratio will be maintained for AT training, providing in-depth coverage of complex course material and personal attention from the instructor.

### **Productive Laboratory**

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

Certain production skills are best learned through direct observation and hands-on experience. PL training will allow for practical, hands-on instruction that cannot be adequately duplicated in a classroom setting. PL training will be provided to approximately 320 Technicians, Engineers and Supervisors/ Managers; and the training will take place at TSC's Mojave facilities.

Equipment and materials to be used during the proposed PL training includes composites fabrication, tooling fabrication, laser machines, winding machines, milling machines, lathes, grinding machines, machine presses, CNC Machine tools, laser cutters, carbon fiber cutters, CAD/CATIA computer systems, pipe benders, x-ray machines, precision inspection machines, and hand tools. Further, Hazard Analysis & Critical Control Point (HACCP) and other techniques need to be trained on the actual spacecraft to complete the learning process. Training will be taught by subject matter experts with demonstrated knowledge and years of expertise in the processes and equipment being used for training.

TSC's training consists of highly technical subject matter that is generally delivered on a 1:1 basis, or in small group settings, to ensure consistency and optimal skills transfer. The small group setting (typically 1:2 or 1:3) allows the trainer to address critical questions while also achieving valuable knowledge sharing among trainees, and would only apply to an estimated 10% of the PL outlined in the proposal. Therefore, up to 48 hours of PL training will be delivered at a 1:3 trainer-to-trainee ratio.

### **Computer-Based Training**

CBT training will be provided to reinforce Class/Lab training provided in Business Skills, Continuous Improvement and Manufacturing Skills, as outlined in the Curriculum.

### **Veterans Program**

TSC conservatively plans to train 10 Veterans (Job Number 3) who have served on active full-time duty in the Armed Forces. The Panel has established a higher reimbursement rate and other incentives for training California veterans, as will be reflected in the contract.

### **Commitment to Training**

TSC's annual budget for training in California is approximately \$650,000. Company-funded training includes basic job skills training, new employee orientation, diversity, performance management, anti-harassment, extensive on-the-job training, and introductory computer skills. 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. The training plan will be directed by TSC's People Development Manager. The Company has designated staff to oversee training and administration including managing, scheduling, delivery and documentation of training. TSC has retained a third party administrator to ensure training adheres to ETP requirements, and to assist with enrollment, data tracking and invoicing.

### **High Unemployment Area**

Approximately 545 trainees in Job Numbers 1, 2, & 3 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by 25%. The Mojave location qualifies for HUA status under these standards; however, TSC is not requesting an HUA wage modification.

Trainees in Job Number 2 qualify for the ETP Job Creation wage of \$13.66 per hour for Kern County.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

TSC retained Training Funding Source in Seal Beach to assist with development of this proposal for a flat fee of \$9,500.

## **ADMINISTRATIVE SERVICES**

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

## **TRAINING VENDORS**

To Be Determined

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

8-200 Trainees may receive any of the following:

**ADVANCED TECHNOLOGY**

- Advanced Aerospace/Aircraft Design
- ANSYS Engineering Software
- CAD/CAM Design Software for Components and Structures
- Computer Aided Three-dimensional Interactive Application (CATIA)
- Composites Fabrication
- Data Acquisition/Data Management System
- Database Administrator Skills (Includes Development, Performance, Tuning)
- Design Review
- Engineering Methods/Processes
- Enterprise Resource Planning (ERP) System Design and Implementation
- Finite Element Modeling and Post Processing (FEMAP) Software
- Finite Element/ Flight Dynamics Modeling
- Flight Sciences/Technology/Software Skills
- Mass Properties
- Mechanical Design
- Non-destructive Testing
- Software Design and Programming
- Software Testing and Automation
- Solidworks CAD Software

**BUSINESS SKILLS**

- Business Acumen
- Ergonomic Solutions
- Communication Skills
- Conflict Resolution Skills
- Effective Meeting Management
- Finance/Accounting Skills
- Goal Setting/Motivation Skills
- Inventory Management Skills
- Logistics/Supply Chain Skills
- Metrics Management
- Presentation Skills
- Preventative Maintenance Skills
- Product Knowledge
- Scheduling Skills
- Train the Trainer Skills

**COMPUTER SKILLS**

- HRIS System Skills
- Intermediate/Advanced Microsoft Office Skills
- Inventory Control Skills
- Learning Management System Skills
- Oracle System Skills
- Quality System Skills



- Ultipro Software Skills
- Web Application Skills

### **CONTINUOUS IMPROVEMENT**

- Agile Product Lifecycle Management (PLM)/Agile PM Skills
- Decision Making/Problem Solving Skills
- Design of Experiments
- Engineering Change Process
- Failure Mode and Effects Analysis
- ISO Standards
- Leadership/Coaching Skills
- Lean Manufacturing Skills
- Performance/Program Management
- Process Flow Analysis
- Process/Quality Improvement Skills
- Program/Project Management
- Root Cause Analysis
- Statistical Process Control
- Teambuilding Skills
- Time Management Skills

### **HAZARDOUS MATERIALS**

- Hazard Analysis & Critical Control Point (HACCP)
- Hazardous Communication Skills
- High-Voltage Electronics
- Toxic and Hazardous Substances
- Environmental Management of Hazardous Materials and Industrial Waste

### **HAZWOPER**

- Hazardous Operations

### **MANUFACTURING SKILLS**

- Operating Procedures Skills
- Aerospace Manufacturing Skills
- Aircraft Structures/Operation/Assembly
- Aircraft Systems Integration
- CNC Machine Operation and Programming
- Gauges/Calibration
- Geometric Dimension and Tolerances (GD&T)
- Manufacturing Best Practices/Process Improvements/Skills
- Production Equipment and Tools/Preventative Maintenance

### **Productive Lab Hours**

0-48

### **MANUFACTURING SKILLS (1:3 ratio)**

- Equipment Operations
- Good Manufacturing Practices
- HACCP (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

### **CBT Hours**

0 - 43

#### **BUSINESS SKILLS**

- Microsoft Office Software Use (3 Hours)
- Microsoft OneNote (1 Hour)
- Ultipro HRIS Training (1 Hour)
- Ultipro Time Management (1 Hour)
- Ultipro Learning Program (1 Hour)
- Oracle ERP (4 Hours)
- Agile System (2 Hours)
- CATIA Software Basics (5 Hours)
- iCims Program (2 Hours)
- Benefits Awareness (1 Hour)

#### **CONTINUOUS IMPROVEMENT**

- Leadership Tips and Best Practices (1 Hour)
- Managing Performance: Best Practices (1 Hour)
- Managing Performance: Corrective Actions (30 Minutes)
- Team Leadership (2 Hours)

#### **MANUFACTURING SKILLS**

- Bagging (30 Minutes)
- Composite Fabrication Process (2 Hours)
- Vacuum Bagging Technique: Single Sided (30 Minutes)
- Assembly (2 Hours)
- Torque (2 Hours)
- Basic Hydraulic Circuit Design (2 Hours)
- Basic Pneumatic Circuit Design (2 Hours)
- Hydraulics and Pneumatics (2 Hours)
- Basic Measurement (30 Minutes)
- Blueprint Reading (30 Minutes)
- Scissor Sharpening (30 Minutes)
- Band Saw Blade Selection (30 Minutes)
- Clamping Basics (30 Minutes)
- Drilling (30 Minutes)
- 5S Overview (30 Minutes)
- Lean Manufacturing Overview (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:  
H.M. Electronics, Inc.**

**Agreement Number: ET18-0185**

**Panel Meeting of:** March 23, 2018

**ETP Regional Office:** San Diego

**Analyst:** H. Bernard

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Technology/Other Manufacturing Communication  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, 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: 615	U.S.: 742	Worldwide: 820
<u>Turnover Rate:</u>	4%		
<u>Managers/Supervisors:</u> (% of total trainees)	16%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$343,392		\$16,704 (15% Job 1)	\$0		\$326,688

In-Kind Contribution:	100% of Total ETP Funding Required	\$554,480
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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., Mgmt. Skills, Mfg. Skills	192	8 - 200	0 - 100	**\$489	*\$17.03
				Weighted Avg: 32			
2	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills	300	8 - 200	0 - 100	\$576	*\$17.03
				Weighted Avg: 32			
3	Retrainee Job Creation Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills	60	8 - 200	0-100	\$1,000	*\$14.19
				Weighted Avg: 50			

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

\*\*Reflects a 15% substantial contribution

**Minimum Wage by County:** Job Number 1: \$17.03 per hour in San Diego County  
 Job Number 2: \$17.03 per hour in San Diego County and \$18.22 per hour in Alameda County;  
 Job Number 3(Job Creation): \$14.19 per hour in San Diego County and \$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  
 Up to \$2.50 per hour may be used to meet the Post-Retention Wage

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Buyer/Planner		10
Material Support		30
Machine Operator		29
Engineers I		30
Engineers II		20
Credit & Collections		10
Accounting Staff		5
Business Applications Programmers/Analysts		15

Administrative Staff		10
Team Leads		5
Supervisors I		7
Supervisors II		1
Managers I		15
Managers II		5
<b>Job Number 2</b>		
Factory Service Specialists		27
Technical Support		45
Manufacturing Assembly		76
Technicians		20
Engineers		10
Installation Coordinators		15
Project/Product Managers		5
Sales Representatives		25
Administrative Staff		17
Team Leads		10
Supervisors I		10
Supervisors II		5
Managers I		25
Managers II		10
<b>Job Number 3 – Job Creation</b>		
Machine Operators		8
Administrative Staff		5
Business Applications Programmers/Analysts		5
Engineers I		10
Engineers II		2
Product/Project Managers		2
Sales Representatives		5
Technicians		10
Team Leads		5
Supervisors		5
Managers		3

## **INTRODUCTION**

Founded in 1971 and headquartered in Poway, H.M. Electronics, Inc. (HME) is a privately-owned company that provides industry-leading wireless communication equipment, timer and software

products to the quick service restaurant industry, high school and collegiate athletic programs. This proposal will also include two HME subsidiaries: Clear Com LLC located in Alameda; and HME Hospitality & Specialty Communications, Inc. (HME Hospitality). HME will act as the lead employer for the purposes of this ETP project.

At the end of March 2018, the HME and HME Hospitality will be moving locations from Poway to Carlsbad. The new location will be approximately 140,000 sq. ft., double its current location. This new location will allow both companies to develop and build more products and add more staff overall.

## **PROJECT DETAILS**

This will be HME's third ETP Agreement, and the third in the last five years. The first ETP contract (ET14-0307) focused on Lean manufacturing training resources, leadership training, manufacturing excellence and general business skills training. The second project (ET16-0366) trained staff that were not included in the first ETP project and new staff. This proposed project will continue to focus on Lean practices and leadership skills, but will also include training on new equipment and software programs. Trainees in this project will not receive duplicative training from previous projects.

HME will be making substantial investments in equipment in 2018 (\$5 Million) for the new facility. The Company will purchase robots in an effort to move toward more automated assembly manufacturing systems, relieving staff from performing tedious, repetitive motions. HME is also purchasing a Screen Printing Inspection machine used for quality management of products, a Flying Probe Tester used for testing circuit boards, and an ERSA Selective Soldering Machine used to precisely solder small components.

HME also has new initiatives for 2018 to enhance product offerings to current and new customers. The Company will work with its current customers to become more efficient with the products they are currently utilizing and market new products. HME is also re-launching its new Enterprise Resource Planning (ERP) system, Microsoft AX in spring 2018. This system was originally scheduled to go live in 2016, but was delayed to March 2017. Once launched in March 2017 it was determined that the system would not meet the Company's business needs and was pulled back. HME revamped the system to better suit its needs and is re-launching in the summer of 2018. This implementation will affect nearly every employee and training on the system will be critical to success.

In addition, HME is implementing a leadership program to train frontline staff to promote into management positions. Training includes Team Building, Leadership Skills, Conflict Resolution and Time Management. This training program will allow the Company to promote from within, creating career ladders for lower paid staff to advance.

### **Retrainee - Job Creation**

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

As a part of HME's expansion to Carlsbad, the Company plans to hire 60 new staff to keep up with the growth. These staff will include both manufacturing staff and office staff in a variety of occupations across the Company. For example, HME plans to hire new Engineers to assist in the design of new product lines in the coming months. Additionally, the Company will be adding IT professionals to assist with both new product development and increased company infrastructure.

To support development of new products, HME is committed to hiring new employees. To be eligible for reimbursement 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. The date of hire for all Job Creation trainees will be within three months before contract approval or within the term of the Agreement.

### **Temporary to Permanent Hiring**

HME intends to train 96 workers under Panel guidelines for the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to HME the average time for “converting” temporary workers into full-time permanent employment is three months. Once a temporary worker is converted into full-time employment, they will typically receive health benefits the first of the following month.

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 HME and its subsidiaries into full-time, permanent employment. Until they are hired, retention and post-retention wage requirements cannot be satisfied, and the Company will not receive progress payments.

### **Training Plan**

Training will be delivered by in-hours experts and vendors as needed via Classroom/Laboratory, Videoconference/E-Learning and Computer-Based Training (CBT) in the following:

**Business Skills:** Training will be provided to all occupation in customer service, leadership skills, product management and sales training.

**Management Skills:** Training will be provided to Managers and Supervisors in coaching and feedback, management skills, and the Company's leadership development program to effectively manage teams, communicate with staff and work for company success.

**Computer Skills:** Training will be delivered to all occupations in the company's ERP system, Microsoft AX, programming and web development training as HME works to bring more of its IT functions in house.

**Manufacturing Skills:** Training will be provided to Machine Operators, Factory Service Specialists, Manufacturing Assembly Staff and Engineers in manufacturing practices & processes, new equipment training, hardware installation, soldering, workmanship standards, circuits & electronics training, and repair & assembly processes.

**Continuous Improvement:** Training will be provided to all occupations in lean processes, quality control, manufacturing design techniques, new product development, problem solving and process controls.

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

CBT will be provided to supplement Class/Lab training. Trainees in Job Numbers 1-3 will receive no more than 100 hours of CBT.

### **Commitment to Training**

HME spends approximately \$30,000 - \$70,000 annually on training in new-hire training, new Supervisor/Manager training, business skills, new technology and equipment training, and other

training as needed. HME uses a variety of methodologies to deliver training, including class, on-the-job, and computer-based 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

This project will be overseen by the Vice President of Human Relations and administered by the Organizational Effectiveness Manager and Training Coordinator. HME will assign three staff from Clear Com LLC and HME Hospitality to be the on-site leads for their respective departments and locations. These staff members will assist the corporate HR team in scheduling training, uploading training hours and managing the LMS.

#### Impact/Outcome

As a result of training, some of the Factory Service Specialists, Technical Support, Manufacturing Assembly and Technicians will be in IPC-610 which is the Acceptability of Electronics Assemblies Training and Certification Program and J-STD-001 the requirements for Soldered Electrical and Electronic Assemblies.

#### Electronic Recordkeeping

HME will use a Learning Management System (LMS) to schedule, track and document training. This system has been reviewed and approved by ETP staff.

#### Substantial Contribution

The Company is a repeat contractor with payment earned and projected earned in excess of \$250,000 at the HME headquarters in Poway within the past five years. (See Prior Project Table.) HME headquarters projects to earn approximately \$121,512 for retraining in ET16-0366. In ET14-0307, this facility earned approximately \$145,614 for retraining. The total projected earnings for the HME headquarters is \$267,126. As such, a 15% substantial contribution has been applied at HME headquarters location (Job Number 1).

#### RECOMMENDATION

Staff recommends approval of this proposal.

#### PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET16-0366	Poway Alameda	3/1/16 – 2/28/18	\$352,400	\$0	
ET14-0307	Poway Alameda	2/24/14 – 2/23/16	\$229,300	\$219,931	(96%)

According to the ETP tracking system, projected earnings for ET16-0366 is \$283,320 (80%) of the encumbered total. HME is in the process of submitting its final closeout invoice.



**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

To Be Determined

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

8 - 200          Trainees may receive any of the following:

**BUSINESS SKILLS**

- Brand Training
- Business Writing Skills
- Collaboration Skills
- Communication Skills
- Conflict Resolution
- Customer Service
- Facilitation Skills
- Marketing Training
- Product Management
- Product Marketing
- Project Management
- Sales Training
- Statistics/Data Analysis
- Leadership Skills
- Time Management

**COMPUTER SKILLS**

- Adobe Fundamentals
- IP Networking
- Knowledge Base Training
- Microsoft Project
- Microsoft Visio
- Microsoft AX - User Training
- Microsoft AX - Development Training
- Microsoft AX - Lead Training
- Microsoft Office Skills - Intermediate/Advanced
- Microsoft Server
- Microsoft SharePoint
- Business Intelligence/SQL Training
- Cloud Computing
- Programming Languages
- Web Development Training

**CONTINUOUS IMPROVEMENT**

- 5S
- A3 Problem Solving
- Basic Networking
- Basic Troubleshooting
- Configuration Management
- CAD Training
- Design for Manufacturability
- Design Verification Techniques
- Electronics Design Techniques

- Engineering Fundamentals
- HALT & HASS Testing
- High-Speed Digital Design
- High-Speed Noise and Grounding
- High-Speed Signal Propagation
- Interdepartmental Processes
- IPC Specialist Recertification
- IPC Trainer Recertification
- ISO
- Kaizen/Continuous Improvement
- Lean Processes
- Mechanical Design Techniques
- New Product Development Process
- Problem Solving
- Process Mapping
- Product Knowledge
- Quality Inspector Certification
- Software Design Techniques
- Software Test Techniques
- Statistical Process Control
- Systems & Processes Knowledge
- Teambuilding
- Technical Support Best Practices

#### **MANAGEMENT SKILLS** (Managers/Supervisors Only)

- Accountability
- Coaching & Feedback
- Collaborative Leadership
- Conflict Resolution
- Effective Communication for Leaders
- Goal Setting & Time Management
- Leadership Development Program
- Leadership Skills
- Management Skills
- New Supervisor Training
- Performance Management
- Supervisory Certification
- Team Leader Training

#### **MANUFACTURING SKILLS**

- Assembly Practices/Processes
- Circuits & Electronics Technical Training
- Coordinate Measuring Machine
- Component Identification
- Configuration Management Training
- Documentation Practices
- Electro Static Discharge
- Equipment/Machinery Training
- Hardware Identification & Installation
- IPC-610 Certification

- IPC-610 Refresher
- J-ST-001 Certification
- Manufacturing Practices/Processes
- Material Support - Practices/Processes
- New Equipment Training
- Printed Circuit Assembly/Surface Mount Technology Practices & Assembly Processes
- Quality Assurance Practices/Processes
- Repair Practices/Assembly Processes
- Safety
- Soldering
- Technical Electronic Training
- Workmanship Standards

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

### **CBT Hours**

0 – 100

#### **BUSINESS SKILLS**

- 3Cs of Internal Customer Service (30 min.)
- Assertive Communication Skills - Module 1: Three V's of Communication (17 min.)
- Assertive Communication Skills - Module 2: Aggressive vs. Passive (20 min.)
- Assertive Communication Skills - Module 3: Passive, Passive-Aggressive and Lesser-known Styles (12 min.)
- Assertive Communication Skills - Module 4: Assertive Techniques (18 min.)
- Assertive Communication-Introduction (23 min.)
- Basic Facilitation (28 min.)
- Being a Great Mentor or Mentee (42 min.)
- Best Practices for Improving Data Quality (28 min.)
- Best Practices for Knowledge Management (20 min.)
- Big Data in the Enterprise: An Introduction (27 min.)
- Big Data: Good for the Customer Not Just the Business (30 min.)
- Brand Training (30 min.)
- Building Great Relationships (35 min.)
- Building Strategic Relationships (28 min.)
- Business Grammar (48 min.)
- Business Intelligence: Best Practices for Successful Project Management (43 min.)
- Business Writing (29 min.)
- Business-Friendly Customer Service (17 min.)
- Call Center Challenges - Thought Provoking Scenarios (22 min.)
- Certified Associate in Project Management (628 min.)
- Cognitive Flexibility (28 min.)
- Communicating Effectively in the Workplace (25 min.)
- Communicating Through Body Language (34 min.)
- Coordinating with Others (26 min.)
- Creating Accountability (33 min.)
- Creating Great Business Video: Design (22 min.)
- Creating Great Business Video: Format (28 min.)

- Creating Great Business Video: Introduction (32 min.)
- Critical Thinking 101 (36 min.)
- Customer Service Week Training Challenge (30 min.)
- Cyber Security Awareness (47 min.)
- Decision-Making: Groups (65 min.)
- Diffusing Hostility Through Customer Service - Spanish (25 min.)
- Diffusing Hostility Through Customer Service (25 min.)
- Don't Panic! A Recipe for Success in Times of Stress (24 min.)
- Effective Data Management (32 min.)
- Effective People Skills (50 min.)
- E-Mail Essentials: Legal & Appropriate Use of E-Mail (28 min.)
- Essential Elements of Internal Customer Service - We Are Customers To Each Other (18 min.)
- Financial Decision-Making (62 min.)
- Five Forbidden Phrases (17 min.)
- High Impact Communication (33 min.)
- Holding Effective Online Meetings (52 min.)
- How to Effectively Manage Time (54 min.)
- How to Handle Angry People (29 min.)
- Influencing The Interaction - Six Practices Which Lead To A More Satisfying Customer Experience (21 min.)
- Insights to Better Mentoring (26 min.)
- Internal Customer Service (20 min.)
- Introducing the Foundations of Business (8 min.)
- It's Your Call (26 min.)
- Killer Words of Customer Service (20 min.)
- Learning Retention Strategies (27 min.)
- Legacy Modernization - In a Budget Constrained Environment (24 min.)
- Listening Skills (13 min.)
- Love & Profit: The Art of Caring Leadership by James Autry (32 min.)
- Making Better Decisions with Framing (68 min.)
- Managing Supply Chain Risk (28 min.)
- Mastering Project Management: Project Implementation (40 min.)
- More Call Center Challenges - Thought Provoking Scenarios (25 min.)
- Operations Management in Manufacturing (14 min.)
- Operations Management: A Case Study of a Hotel (28 min.)
- Operations Processes (23 min.)
- Opportunities in International Business (12 min.)
- Optimizing IT to Meet Business Objectives (23 min.)
- Performance Excellence - Customer Service Communication Skills (76 min.)
- Performance Excellence - Fundamentals of Customer Service (70 min.)
- Performance Excellence - Getting Customer Feedback (23 min.)
- Performance Excellence - Introduction (34 min.)
- Performance Excellence - Using Surveys to Get Feedback (60 min.)
- Performance Excellence: Analyzing Your Customer Service (64 min.)
- PMI Risk Management Professional (500 min.)
- Powerful Presentation Skills (88 min.)
- PRINCE2 Foundation (406 min.)
- PRINCE2 Practitioner (770 min.)
- Proactive Customer Service (19 min.)

- Project Management Professional (2400 min.)
- Quickbooks Premier 2014 (369 min.)
- Recognizing Common Barriers to Communication (25 min.)
- Sage 50 Certificate Course (608 min.)
- Sales Territory Development (204 min.)
- Salesforce 2015: Power User (455 min.)
- Selling Skills from A to H (12 min.)
- Selling Skills from I to Q (12 min.)
- Selling Skills from R to Z (10 min.)
- Service Matters by Telephone Doctor (69 min.)
- Setting and Managing Priorities (40 min.)
- Seven Keys to a Positive Mental Attitude (23 min.)
- Six Cardinal Rules of Customer Service (18 min.)
- Six Steps to Service Recovery (18 min.)
- Small Business Management Series (28 min.)
- Social Media (584 min.)
- Tactics of Innovation with Joel Barker (22 min.)
- Taking C.A.R.E. of Business (25 min.)
- Team Facilitation Skills: Getting Started (45 min.)
- Team Facilitation Skills: Introduction (59 min.)
- The 5 Values of Great Customer Service (24 min.)
- The Five Secrets of Communication (48 min.)
- The Four P's: Marketing Strategies (25 min.)
- The Four Styles (20 min.)
- The Globalization of Business (13 min.)
- The Value of Followers (32 min.)
- The Workplace Excellence Series: 5 Course Series (64 min.)
- Time Challenged (21 min.)
- Time Management Tune-up: 6 Course Series (48 min.)
- Train-the-Trainer - Content Development (58 min.)
- Train-the-Trainer - Delivering Training (37 min.)
- Train-the-Trainer - The New Learner (33 min.)
- Train-the-Trainer - Training Management (44 min.)
- Twelve Angry Men: Teams That Don't Quit (24 min.)
- Understanding Decision Making (27 min.)
- Understanding DISC (42 min.)
- What's in it for Me? A Customer Service Training (20 min.)

### **COMPUTER SKILLS**

- Ansible Essentials (176 min.)
- AWS Certified Cloud Practitioner (127 min.)
- AWS Certified SysOps Administrator - Associate (207 min.)
- AWS Solutions Architect - Compute Services (125 min.)
- AWS Solutions Architect - Storage Services (144 min.)
- AWS: Technical Essentials (266 min.)
- CentOS System Administrator Prep (556 min.)
- Cisco CCDA 200-310 DESGN (341 min.)
- Cisco CCDP 300-320 ARCH (795 min.)
- Cisco CCENT/CCNA ICND1 100-105 (1196 min.)
- Cisco CCNA 640-875 SPNGN1 (876 min.)

- Cisco CCNA 640-878 SPNGN2 (721 min.)
- Cisco CCNA Cloud 210-451 CLDFND (210 min.)
- Cisco CCNA Collaboration 210-060 CICD (632 min.)
- Cisco CCNA Collaboration 210-065 CIVND1 (153 min.)
- Cisco CCNA Collaboration 210-065 CIVND2 (456 min.)
- Cisco CCNA Hands-on Labs Using Wireshark & GNS3 (480 min.)
- Cisco CCNA ICND2 200-105 (1072 min.)
- Cisco CCNA Security 210-260 IINS (1794 min.)
- Cisco CCNA Wireless 200-355 WIFUND (486 min.)
- Cisco CCNP ROUTE 300-101 Hands-on Labs Exam Prep (280 min.)
- Cisco CCNP Routing and Switching 300-101 ROUTE (492 min.)
- Cisco CCNP Routing/Switching 300-115 SWITCH (600 min.)
- Cisco CCNP Routing/Switching 300-135 TSHOOT (550 min.)
- Cisco CCNP Security 300-206 SENSS (622 min.)
- Cisco CCNP Security 300-207 SITCS (204 min.)
- Cisco CCNP Security 300-208 SISAS (332 min.)
- Cisco CCNP Security 300-209 SIMOS (554 min.)
- Cisco CCNP SWITCH 300-115 Hands-on Labs Exam Prep (190 min.)
- Cisco CCNP TSHOOT 300-135 Hands-on Labs Exam Prep (301 min.)
- Cisco R&S Troubleshooting Mastery (508 min.)
- Cisco Virtual Internet Routing Lab (VIRL) 1.x (103 min.)
- Cisco VoIP CCNA Voice ICOMM 640-461 (1146 min.)
- Cisco VoIP CCNP Voice CIPT2 v8.0 642-457 (541 min.)
- Cisco VoIP CCNP Voice CVOICE v8.0 642-437 (927 min.)
- CompTIA A+ 220-901 (579 min.)
- CompTIA A+ 220-902 (488 min.)
- CompTIA Cloud Essentials (CLO-001) (142 min.)
- CompTIA CSA+ Threat Management (177 min.)
- CompTIA CSA+ Vulnerability Management (82 min.)
- CompTIA Network+ N10-006 (1014 min.)
- CompTIA Security+ (SY0-501) (1384 min.)
- CompTIA Security+ SY0-401 (1052 min.)
- CPD200: Developing Solutions for Google Cloud Platform (479 min.)
- Exam Walkthrough: Cisco ICND2/CCNA 200-101 (185 min.)
- Google BigQuery: Qualified Developer (331 min.)
- Google Cloud SQL: Qualified Developer (171 min.)
- Google Cloud Storage: Qualified Developer (126 min.)
- Google Compute Engine: Qualified Developer (369 min.)
- Identity with Windows Server 2016 (Exam 70-742) (465 min.)
- Installation, Storage and Compute with Windows Server 2016 (Exam 70-740) (820 min.)
- IT Expertise: Building and Configuring a Business Wireless Network (247 min.)
- Linux Essentials (398 min.)
- Linux LPI LPIC-2: Exam 201-400 (413 min.)
- Linux LPI LPIC-2: Exam 202-400 (485 min.)
- LPI Linux LPIC-1 and CompTIA Linux+ Prep 4.0 (871 min.)
- Microsoft Azure 70-532 (567 min.)
- Microsoft Azure 70-533 (622 min.)
- Microsoft Azure 70-534 (293 min.)
- Microsoft Excel 2016 (401 min.)

- Microsoft MCSA SQL Server 2016 70-761 (372 min.)
- Microsoft MCSE SQL Server 2012 70-464 (635 min.)
- Microsoft MCSE SQL Server 2012 70-465 (430 min.)
- Microsoft MCSE SQL Server 2014 70-464 (632 min.)
- Microsoft MCSE SQL Server 2014 70-465 Azure Updates (79 min.)
- Microsoft MTA Database Fundamentals (412 min.)
- Microsoft MTA Windows OS Fundamentals 98-349 (310 min.)
- Microsoft Office 365 Identities and Requirements 70-346 (202 min.)
- Microsoft OneNote (224 min.)
- Microsoft Outlook 2016 (242 min.)
- Microsoft PowerPoint 2016 (293 min.)
- Microsoft Programming .NET 4 Software Development Fundamentals 98-361 (706 min.)
- Microsoft SharePoint 2016 Fundamentals (203 min.)
- Microsoft SQL Server 2012 70-461 (723 min.)
- Microsoft SQL Server 2012 70-462 (803 min.)
- Microsoft SQL Server 2012 70-463 (759 min.)
- Microsoft Teams (114 min.)
- Microsoft Visio 2013 (290 min.)
- Microsoft Visual Studio 2012 70-480 (439 min.)
- Microsoft Windows 10 70-697: Configuring Windows Devices (405 min.)
- Microsoft Windows 10 70-698: Installing and Configuring Windows 10 (616 min.)
- Microsoft Windows Server 2012 70-410 with R2 Updates (996 min.)
- Microsoft Windows Server 2012 70-411 R2 (550 min.)
- Microsoft Windows Server 2012 70-417 with R2 Updates (1149 min.)
- Microsoft Word 2016 (425 min.)
- Networking with Windows Server 2016 (Exam 70-741) (1325 min.)
- Penetration Testing with Linux Tools (676 min.)
- PowerShell 4 Foundations (449 min.)
- PowerShell Reference Training (1852 min.)
- Puppet Fundamentals (150 min.)
- Ubuntu (516 min.)
- VMware Horizon 6 (with View) (217 min.)
- VMware VCA-DCV (150 min.)
- VMware vSphere 5.5 VCP5-DCV (1070 min.)
- VMware vSphere 6 (VCP6-DCV) (780 min.)
- VMware vSphere 6.5 (VCP6.5-DCV) (1049 min.)
- What's New in Office 2016 (114 min.)
- Windows 10 End-User Essentials (119 min.)
- Adobe Acrobat Pro XI: 15 Course Series (72 min.)
- Adobe Acrobat X: 14 Course Series (89 min.)
- Adobe AIR 3: 15 Course Series (73 min.)
- Adobe Dreamweaver CC: 15 Course Series (73 min.)
- Adobe Dreamweaver CS6: 26 Course Series (137 min.)
- Adobe Fireworks CS6: 15 Course Series (70 min.)
- Adobe Flash Builder 4.6: 15 Course Series (51 min.)
- Adobe Flash CS 6: 15 Course Series (101 min.)
- Adobe Flash Professional CC: 45 Course Series (222 min.)
- Adobe Photoshop CC: 59 Course Series (276 min.)
- Adobe Photoshop CS6: 17 Course Series (TBD min.)



- Adobe Premiere Elements 12: 8 Course Series (36 min.)
- AJAX Development: (Part 1 of 6) What is AJAX? (43 min.)
- AJAX Development: (Part 3 of 6) AJAX and JSON (42 min.)
- AJAX Development: (Part 4 of 6) XSLT (19 min.)
- AJAX Development: (Part 5 of 6) AJAX with the jQuery Framework (15 min.)
- AJAX Development: (Part 6 of 6) AJAX and PHP (23 min.)
- Autodesk AutoCAD 2014: 15 Course Series (68 min.)
- Big Iron in the House: The Role of the Mainframe Today (24 min.)
- Certified Information Systems Auditor (CISA) 2nd Edition (768 min.)
- Certified Scrum Master (CSM) (202 min.)
- Cisco 210-065: Implementing Cisco Video Network Devices, Part 1+ 2. (1080 min.)
- Cisco VoIP CCNP Voice CIPT1 v8.0 642-447 (613 min.)
- Converged Infrastructure: Benefits and Challenges (25 min.)
- CSS Specialist: (Part 4 of 6) Animations with CSS3 (45 min.)
- CSS Specialist: (Part 1 of 6) CSS3 Introduction (78 min.)
- CSS Specialist: (Part 2 of 6) Styling Specific Elements (117 min.)
- CSS Specialist: (Part 3 of 6) The Box Model (57 min.)
- CSS Specialist: (Part 5 of 6) Putting Elements Together (43 min.)
- CSS Specialist: (Part 6 of 6) Responsive Design for Web and Mobile (50 min.)
- Halogen for Employees (20 min.)
- Halogen for Employees 2.0 (20 min.)
- Halogen for Managers (20 min.)
- HTML5 Essentials (468 min.)
- Information Technology Infrastructure Library (ITIL Foundations V3) (490 min.)
- Introduction to Web Development: (Part 1 of 3) Tools and HTML (37 min.)
- Introduction to Web Development: (Part 2 of 3) CSS (33 min.)
- Introduction to Web Development: (Part 3 of 3) Javascript (26 min.)
- ITIL Services Operations (600 min.)
- Microsoft Excel 2013 Advanced (84 min.)
- Microsoft .NET 4.5 Programming with HTML 5 (435 min.)
- Microsoft 70-243: Administering and Deploying SCCM 2012 (372 min.)
- Microsoft 70-331: Core Solutions of SharePoint Server 2013 (451 min.)
- Microsoft 70-332: Advanced Solutions of SharePoint Server 2013 (341 min.)
- Microsoft 70-336: MCSE: Core Solutions Lync Server 2013 (1333 min.)
- Microsoft 70-337: MCSE: Communication - Lync Server (1101 min.)
- Microsoft 70-341: Core Solutions of Exchange Server 2013 (466 min.)
- Microsoft 70-342: Advanced Solutions of Exchange Server 2013 (391 min.)
- Microsoft 70-346: Managing Office 365 Identities and Requirements (967 min.)
- Microsoft 70-347: Enabling Office 365 Services (1091 min.)
- Microsoft 70-409: Server Virtualization with Windows Server Hyper-V and System Center (1211 min.)
- Microsoft 70-410: Installing and Configuring Windows Server 2012 (1339 min.)
- Microsoft 70-411: Administering Windows Server 2012 (899 min.)
- Microsoft 70-412: Configuring Advanced Windows Server 2012 Services (1090 min.)
- Microsoft 70-413: Designing and Implementing a Server Infrastructure (303 min.)
- Microsoft 70-414: Implementing an Advanced Server Infrastructure (300 min.)
- Microsoft 70-432: SQL Server 2008, Implementation and Maintenance (550 min.)
- Microsoft 70-448: Microsoft SQL Server 2008, Business Intelligence Development and Maintenance (512 min.)
- Microsoft 70-461: Querying SQL Server 2012 (742 min.)

- Microsoft 70-462: Administering SQL Server 2012 Databases (504 min.)
- Microsoft 70-463: Implementing a Data Warehouse with SQL Server 2012 (423 min.)
- Microsoft 70-464: Developing Microsoft SQL Server 2012 Databases (641 min.)
- Microsoft 70-465: Designing Database Solutions for Microsoft SQL Server 2012 - 585 Min. (585 min.)
- Microsoft 70-466: Implementing Data Models & Reports with SQL Server 2012 (784 min.)
- Microsoft 70-467: Designing Business Intelligence Solutions with SQL Server 2012 (1196 min.)
- Microsoft 70-480: Programming in HTML5 with JavaScript and CSS3 (1066 min.)
- Microsoft 70-486 Developing ASP.NET MVC 4 Web Applications (1118 min.)
- Microsoft 70-487 Developing Microsoft Azure and Web Services (929 min.)
- Microsoft 70-487 Developing Microsoft Azure and Web Services (929 min.)
- Microsoft 70-640 TS: Windows Server 2008 Active Directory, Configuring (1233 min.)
- Microsoft 70-642 TS: Windows Server 2008 Network Infrastructure, Configuring (1155 min.)
- Microsoft 70-646 Pro: Windows Server 2008, Server Administrator (804 min.)
- Microsoft 70-680 TS: Configuring Windows 7 (656 min.)
- Microsoft 70-685 Pro: Windows 7, Enterprise Desktop Support Technician (860 min.)
- Microsoft 70-686 Pro: Windows 7, Enterprise Desktop Administrator (1234 min.)
- Microsoft 70-687: Configuring Windows 8 (949 min.)
- Microsoft 70-688: Managing and Maintaining Windows 8 (1186 min.)
- Microsoft 70-697: Configuring Windows Devices (Windows 10) (984 min.)
- Microsoft Access 2013 Advanced (363 min.)
- Microsoft Access 2013 Intermediate (363 min.)
- Microsoft Excel 2013 Advanced (84 min.)
- Microsoft Excel 2013 Intermediate (153 min.)
- Microsoft Office Excel 2016: Part 2 (Intermediate) (148 min.)
- Microsoft Office Excel 2016: Part 3 (Advanced) (102 min.)
- Microsoft Office Excel 2016: Part 4 (Data Analysis and PivotTables) (131 min.)
- Microsoft Office Outlook 2016: Part 2 (Advanced) (203 min.)
- Microsoft Office PowerPoint 2016: Part 2 (Advanced) (208 min.)
- Microsoft Office Word 2016: Part 2 (Intermediate) (155 min.)
- Microsoft Office Word 2016: Part 3 (Advanced) (191 min.)

### **CONTINUOUS IMPROVEMENT**

- A3 Problem Solving (30 min.)
- Audio Design Techniques I (30 min.)
- Audio Design Techniques II (30 min.)
- Audio Design Techniques III (30 min.)
- Audio Design Techniques IV (30 min.)
- Audio Design Techniques IX (30 min.)
- Audio Design Techniques V (30 min.)
- Audio Design Techniques VI (30 min.)
- Audio Design Techniques VII (30 min.)
- Audio Design Techniques VIII (30 min.)
- Audio Design Techniques X (30 min.)
- Business Process Reengineering: Implementing Radical Change (43 min.)
- Clear-Com Product Training (30 min.)
- CQI: Overview (24 min.)

- CQI: Tools - Charts (52 min.)
- CQI: Tools - Data (32 min.)
- CQI: Tools - Diagrams (33 min.)
- CQI: Tools - Flow (32 min.)
- CQI: Tools - Statistics (35 min.)
- Creating a Mindset for Change: (part 1 of 6) Changing your Mindset (23 min.)
- Creating a Mindset for Change: (part 2 of 6) Managing Moments (9 min.)
- Creating a Mindset for Change: (part 3 of 6) Embracing Change (33 min.)
- Creating a Mindset for Change: (part 4 of 6) Making it Happen (18 min.)
- Creating a Mindset for Change: (part 5 of 6) Influencing Others (14 min.)
- Enterprise Automation: What You Need to Know (24 min.)
- High-Speed Digital Design I (80 min.)
- High-Speed Digital Design II (110 min.)
- High-Speed Digital Design III (45 min.)
- High-Speed Digital Design IV (50 min.)
- High-Speed Digital Design IX (75 min.)
- High-Speed Digital Design V (90 min.)
- High-Speed Digital Design VI (120 min.)
- High-Speed Digital Design VII (90 min.)
- High-Speed Digital Design VIII (120 min.)
- High-Speed Digital Design X (30 min.)
- High-Speed Noise and Grounding I (50 min.)
- High-Speed Noise and Grounding II (36 min.)
- High-Speed Noise and Grounding III (53 min.)
- High-Speed Noise and Grounding IV (70 min.)
- High-Speed Noise and Grounding IX (55 min.)
- High-Speed Noise and Grounding V (55 min.)
- High-Speed Noise and Grounding VI (35 min.)
- High-Speed Noise and Grounding VII (55 min.)
- High-Speed Noise and Grounding VIII (60 min.)
- High-Speed Noise and Grounding X (60 min.)
- High-Speed Noise and Grounding XI (30 min.)
- High-Speed Noise and Grounding XII (50 min.)
- High-Speed Noise and Grounding XIII (50 min.)
- High-Speed Noise and Grounding XIV (21 min.)
- High-Speed Signal Propagation I (40 min.)
- High-Speed Signal Propagation II (100 min.)
- High-Speed Signal Propagation III (85 min.)
- High-Speed Signal Propagation IV (40 min.)
- High-Speed Signal Propagation IX (70 min.)
- High-Speed Signal Propagation V (70 min.)
- High-Speed Signal Propagation VI (90 min.)
- High-Speed Signal Propagation VII (60 min.)
- High-Speed Signal Propagation VIII (90 min.)
- HSC Product Training (30 min.)
- JTECH Product Training (30 min.)
- Labor Automation: The Next Wave of Innovation (27 min.)
- Lean: Doing More with Less (38 min.)
- Make Change Work (53 min.)
- Product Development Process (Rev.B) (90 min.)

- Product Development Process (30 min.)
- Regulatory Training I (30 min.)
- Regulatory Training II (30 min.)
- Regulatory Training III (30 min.)
- Six Sigma Black Belt (1264 min.)
- Six Sigma Green Belt (1226 min.)
- Six Sigma: A Method for Eliminating Defects (44 min.)
- The New Workplace: Leading the Change (24 min.)
- The New Workplace: Making the Change (24 min.)
- Total Quality Management (TQM) (35 min.)

### **MANAGEMENT SKILLS** (Managers/Supervisors Only)

- A Manager's Guide: Surviving the Slings & Arrows (27 min.)
- A Manager's Guide: To Lead Or Not To Lead (25 min.)
- Bud to Boss: Accelerate Goal Achievement (30 min.)
- Bud to Boss: Accelerate the Acceptance of Organization Change (30 min.)
- Bud to Boss: Cautious Communication Style (30 min.)
- Bud to Boss: Communicating Positive Expectations (30 min.)
- Bud to Boss: Control vs. Influence (30 min.)
- Bud to Boss: Creating a Conflict Resolution Mindset (30 min.)
- Bud to Boss: Creating the Mindset for Your New Role (30 min.)
- Bud to Boss: Diagnose Resistance to Change (30 min.)
- Bud to Boss: Discussing Your New Leadership Role (30 min.)
- Bud to Boss: Dominant Communication Style (30 min.)
- Bud to Boss: Four Types of Feedback (30 min.)
- Bud to Boss: Goal Setting at Three Levels (30 min.)
- Bud to Boss: Inspiring Communication Style (30 min.)
- Bud to Boss: Motivation for Change (30 min.)
- Bud to Boss: Remove Yourself as a Source of Threat (30 min.)
- Bud to Boss: Seven Components of Great Presentations (30 min.)
- Bud to Boss: Six Step Coaching Model (30 min.)
- Bud to Boss: Sources of Feedback (30 min.)
- Bud to Boss: Supportive Communication Style (30 min.)
- Bud to Boss: Understand the Expectations of a New Role (30 min.)
- Bullying & Other Disruptive Behavior: for Managers & Supervisors (23 min.)
- Character in Action... The United States Coast Guard on Leadership (20 min.)
- Coaching - The Power of Questions (21 min.)
- Coaching for Higher Performance (46 min.)
- Conducting a Formal Mentoring Program (24 min.)
- Developing B-Players into Top Performers (42 min.)
- Developing Your Leadership Style (21 min.)
- Dimensions of Coaching (23 min.)
- Effective Global Program Management for IT (35 min.)
- Gaining Commitment - Setting Performance Objectives That Work (20 min.)
- LEAD NOW: Coaching (8 min.)
- LEAD NOW: Customer Focus (8 min.)
- LEAD NOW: Decision Making (8 min.)
- LEAD NOW: Dependability (8 min.)
- LEAD NOW: Effective Communication (8 min.)
- LEAD NOW: Ego Management (8 min.)

- LEAD NOW: Focusing on Results (8 min.)
- LEAD NOW: Innovation (8 min.)
- LEAD NOW: Inspiring Commitment (8 min.)
- LEAD NOW: Listening (8 min.)
- LEAD NOW: Organizational Savvy (8 min.)
- LEAD NOW: Presentation Skills (8 min.)
- LEAD NOW: Problem Solving (8 min.)
- LEAD NOW: Strategic Thinking (8 min.)
- LEAD NOW: Team Building (8 min.)
- LEAD NOW: Time Management (8 min.)
- LEAD NOW: Valuing Others (8 min.)
- Leader Madness (21 min.)
- Leadership Best Practices - Part 1: The Leaders in Leadership (9 min.)
- Leadership Best Practices - Part 3: The Irrefutable Laws of Leadership (15 min.)
- Leadership Best Practices - Part 4: Five Practices of Exemplary Leaders (12 min.)
- Leadership Best Practices - Part 5: Developing Your Own Leadership Best Practices (15 min.)
- Leadership Best Practices - Part 6: Assessment (4 min.)
- Leadership Essentials: Align Resources to Strategic Priorities (20 min.)
- Leadership Essentials: Analyze the Pros and Cons of Key Decisions (20 min.)
- Leadership Essentials: Are Your Actions Consistent with Your Values? (20 min.)
- Leadership Essentials: Balance Your Leadership and Employee Roles (20 min.)
- Leadership Essentials: Become a Reliable Leader with Integrity (20 min.)
- Leadership Essentials: Connecting Goals to Vision (20 min.)
- Leadership Essentials: Connecting Team Work to the Strategy (20 min.)
- Leadership Essentials: Increase Employee Innovation (20 min.)
- Leadership Essentials: Innovation Norms and Expectations (20 min.)
- Leadership Essentials: Keep Your Top Talent (20 min.)
- Leadership Essentials: Responding to Issues and Concerns (20 min.)
- Leadership Essentials: Speaking Your Mind (20 min.)
- Leadership Fundamentals (45 min.)
- Managing Virtual Teams: Techniques and Best Practices (38 min.)
- Maximizing the Benefits of Your Organization's Structure (26 min.)
- Millennium: Coaching and Performance Feedback Training Scenes (63 min.)
- Remote Leadership: Applying Coaching Remotely (30 min.)
- Remote Leadership: Building Trust in the Virtual Environment (30 min.)
- Remote Leadership: Building Trust with Remote Teams (30 min.)
- Remote Leadership: Classic Leadership with a Virtual Twist (30 min.)
- Remote Leadership: Coaching Others The Basics (30 min.)
- Remote Leadership: Collaborative Goal Setting at a Distance (30 min.)
- Remote Leadership: Communication Techniques for Web-based Presentations (30 min.)
- Remote Leadership: Getting Ready for Your Virtual Presentation (30 min.)
- Remote Leadership: Giving Remote Feedback (30 min.)
- Remote Leadership: Helping Others Achieve Goals (30 min.)
- Remote Leadership: Keys to Remote Accountability (30 min.)
- Remote Leadership: Leading a Virtual Meeting (30 min.)
- Remote Leadership: Managing Remote Teams (30 min.)
- Remote Leadership: Maximizing Virtual Tools (30 min.)
- Remote Leadership: Planning a Virtual Meeting (30 min.)
- Remote Leadership: The Pitfalls of Web-Based Meetings (30 min.)

- Remote Leadership: The Unique Aspects of the Virtual Work Environment (30 min.)
- Remote Leadership: Web-based Presentation Basics (30 min.)
- Succession Planning (28 min.)
- Supervisor Fundamentals. (67 min.)
- The Paradigm Mastery Series by Joel Barker: Change and Leadership (31 min.)
- The Paradigm Mastery Series by Joel Barker: The Paradigm Curve (25 min.)
- The Paradigm Mastery Series by Joel Barker: The Paradigm Effect (26 min.)
- The Paradigm Mastery Series by Joel Barker: The Paradigm Hunting (19 min.)
- The Paradigm Mastery Series by Joel Barker: The Paradigm Partners (28 min.)
- Would I Work for Me? (20 min.)

### **MANUFACTURING SKILLS**

- Electro Static Discharge/Manufacturing (30 min.)
- New Hire Workmanship Standards (30 min.)
- Electrical Safety in the Laboratory (12 min.)

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



**Training Proposal for:**

**Karma Automotive LLC**

**Agreement Number: ET18-0187**

**Panel Meeting of:** March 23, 2018

**ETP Regional Office:** San Diego

**Analyst:** J. Davey

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee HUA	Industry Sector(s):	Manufacturing Green Technology Nanotechnology  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Orange, Riverside	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 767	U.S.: 811	Worldwide: 811
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	13%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$302,400		\$0	\$0		\$302,400

In-Kind Contribution:	100% of Total ETP Funding Required	\$1,000,000
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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., HazMat, Mfg. Skills, Adv. Tech, PL-Mfg. Skills	525	8-200	0-200	\$576	\$16.70
				Weighted Avg: 32			

**Minimum Wage by County:** Job Number 1: \$17.50 per hour for Orange County and \$16.70 per hour for Riverside County  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$2.37 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Operations Staff		110
Sr. Operations Staff		50
Manufacturing Staff		120
Engineering/IT Staff		175
Supervisor/Manager		70

**INTRODUCTION**

Headquartered in Irvine, Karma Automotive LLC (Karma) manufactures luxury gas-electric, plug-in electric (hybrid) automobiles. This is Karma’s second ETP Agreement, and the second in the last five years.

**Project Details**

In the prior proposal, the Company hired, trained and retained over 450 newly-hired and Veteran trainees, many of whom work at the new production facility.

Training focused on processes, procedures frontline management training, employee cross-training and Karma’s first plug-in electric hybrid automobile, the Revero. Karma targeted training on a new frontline management training program and employee cross-training. This project will focus on the delivery of technical skills for the Engineering Staff. While trainees may receive training in the same topics, they will not receive the same training as in the previous ETP project.



Karma is now in the final development stage for manufacturing new models for production. Training will provide workers the knowledge and skills necessary to design and develop the next generation of Karma automobiles. Training will help newly hired workers achieve competency quickly.

Training will meet the needs of incumbent workers at Irvine headquarters and manufacturing plant in Moreno Valley. Staff must be cross-trained on all jobs within their department/function. Karma plans to remain a niche, luxury automobile manufacturer, therefore, employees need to maintain the highest level and widest range of skills possible to produce high-quality automobiles.

Karma must continue to improve its internal processes for efficiency in a low production rate environment. Each automobile remains at a specific station longer; therefore, for each station, trainees need to learn a number of different processes and skills to be effective and efficient. The Company has several production routines within the body shop skill set, so it is critical to train frontline workers to work efficiently across this job classification and within their department.

### **Training Plan**

Training will take place at the Company's facilities in Moreno Valley and Irvine by in-house experts and vendors as needed.

**Business Skills:** Training will be offered to all occupations in supplemental business skills in areas such as Business Acumen, Communication Skills, Customer Experience/ Customer Support, and Materials Selection/Product Optimization. This training will improve the ability of the workforce to better manage the overall business while implementing the new products and processes.

**Computer Skills:** Training will be offered to all occupations on systems and computer applications that are applicable to their job role and responsibilities.

**Continuous Improvement:** Training will be offered to all occupations in Karma's unique operations model, as well as the skills and proficiency necessary for high-level efficiency, quality and customer service. Training will include Change Management, ISO Skills, Leadership Skills and Lean/Six Sigma Skills.

**Hazardous Materials:** Training will be offered to Supervisors/Managers and Operations Staff with supplemental hazardous materials skills in Hazardous Materials training (e.g. adhesives, solvents, chemicals, paint, etc.) and High-Voltage Batter and Systems Awareness.

**Manufacturing Skills:** Training will be offered to Operations Staff in Hybrid Vehicle Manufacturing skills topics including Automotive/Electrical Safety, Body Shop Equipment Operation/Maintenance, Electro Mechanical/ Maintenance Skills, Engineering/Systems Skills, and Hybrid Vehicle Manufacturing/Assembly/Quality Control Processes. These skills will ensure new and existing employees are up-to-date with the latest developments in the manufacture and assembly of emerging technologies to ensure efficiency and quality during production.

### **Advanced Technology**

The proposed Advanced Technology (AT) training is designed exclusively for Information Technology/Engineering professionals with an emphasis on innovation and new product development to further Karma's design and engineering goals. Courses will be taught by a combination of vendors and in-house experts. Training will be offered to approximately 100 Engineering/IT Staff.

The trainer-to-trainee ratio will not exceed 1:10 to allow in-depth coverage and personal attention from the instructor. Depending on the types of systems involved and the specific expertise required, the course will range from \$75 to \$200 per hour, per trainee.

Training of this nature is intensive and requires a large amount of time, dedicated largely to the acquisition of advanced skills including Hybrid Vehicle Engineering/Design Skills, Programming Skills, Web Development, Net Security, Information Security, Cisco Skill and Citrix Skills.

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

Karma is requesting to provide up to 100% CBT for select trainees. This will provide Karma flexibility to provide training via the appropriate training modality based on the stages of development and production throughout the two-year term of the agreement.

With the current and rapid advances in technology, CBT is an integral part of a larger system of practices and policies designed to prepare and support a high skilled workforce. This self-paced CBT delivery method allows Karma's frontline worker's to participate in training during the work day at a time that it best meets their job schedule or demand.

CBT is typically used to supplement/complement planned instructor-led learning in an effort to ensure a solid understanding of the concepts presented. The majority of the training in the proposal is Manufacturing Skills targeted for Operations Staff, Engineering/IT and Supervisors/Managers.

CBT was developed by Tooling U-SME. The curriculum is customized for the manufacturing industry and targets the training needs of the auto industry. Tooling U-SME is constantly developing new content for their CBT library of classes, based on the requests and needs of the manufacturing community.

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

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

Karma's business requires trainees possess many skills that must be learned via observation and hands-on experience. The use of PL allows for practical, "hands-on" experience that cannot be duplicated in a classroom setting. Additionally, Karma has some equipment that is in limited supply and requires special power connections and therefore can only be used on the Operations line.

Karma will provide up to 60 hours per-trainee of PL-Manufacturing Skills. Trainees will be directed by the instructor at all times. Training assignments will be task-oriented and specific to the manufacturing or software/hardware equipment. The trainer-to-trainee ratio is 1:1. Training will be conducted at the Company's Moreno Valley location for Operations and Quality Staff for up to 150 trainees.

### **High Unemployment Area**

Approximately 185 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 Moreno Valley, Riverside County, qualify for HUA status under these standards. However, Karma is not asking for a wage modification.

## **Green/Clean Operations**

Karma is committed to the use of Green/Clean Technology. The Company manufactures its plug-in hybrid vehicle, and the Revero, which uses roof-top solar panels to charge its high voltage battery. Additionally, the Company is also exploring the installation of solar panels on the roof of its facilities in Irvine and Moreno Valley.

## **Nanotechnology**

Karma's plug-in hybrid vehicle will have A123's new battery, which uses Nanotechnology to deliver high power energy in a more lightweight and compact package. In addition, with over 40 microcomputers included in the vehicle design, Nanotechnology plays a key role in the overall vehicle design and manufacture.

## **Substantial Contribution**

Karma Automotive is a repeat contractor with payment earned in excess of \$250,000 in its previous ETP contract. However, the amount earned for retrainee, incumbent workers at any single facility was less than \$250,000. Karma earned \$111,206 for incumbent workers, most of which was earned at the Irvine or Costa Mesa facilities; and, \$514,088 in earnings for newly-hired retrainees or veteran trainees, most of which was earned at the Moreno Valley manufacturing facility. Thus, Karma is not subject to Substantial Contribution.

## **Commitment to Training**

Karma's projected training budget for 2018 is approximately \$500,000. Training includes new employee orientation, basic OSHA Training, basic Microsoft Office, and anti-harassment. Additionally, Karma allows employees to attend key industry conferences that provide training break-out sessions and seminars on industry topics and trends. This training will be provided at Karma's expense during the term of the proposed agreement and beyond.

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.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET16-0287	Irvine, Moreno Valley	12/31/15 – 12/30/17	\$835,218	\$625,294*	(75%)

\*Earnings for incumbent workers (Job 1) were \$111,206.

## **DEVELOPMENT SERVICES**

Training Funding Partners in Fountain Valley assisted with development for a flat fee of \$22,500.

**ADMINISTRATIVE SERVICES**

Training Funding Partners will also perform administrative services for amount not to exceed 12% of payment earned.

**TRAINING VENDORS**

To Be Determined

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

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Acumen
- Communication Skills
- Customer Experience/Customer Support
- Data Collection and Recordkeeping
- Effective Business/Technical Writing
- Finance/Accounting Skills
- Marketing/Sales Skills
- Materials Selection/Product Optimization
- New and Revised Standard Operating Procedures
- Presentation Skills
- Procurement/Supply Chain Management

**CONTINUOUS IMPROVEMENT**

- Change Management
- Environmental Sustainability Practices
- ISO Skills
- Leadership Skills
- Lean/Six Sigma
- Process Improvement/Efficiency Skills
- Product Quality Planning/Product Liability
- Project/Program Management
- Risk Management Skills
- Team Building
- Time Management
- Troubleshooting/Root Cause Analysis

**COMPUTER SKILLS**

- Adobe Skills
- Computer-Aided Design (CAD) Systems
- Computer Programming and Software Maintenance
- Concur System Skills
- Document Management Software Systems
- Information Security
- Intermediate/Advanced MS Office Skills
- Kronos System Skills
- Learning Management System Skills
- Microsoft Project
- SAP System Skills
- SharePoint
- Skype for Business Skills
- Tableau
- Workterra System Skills

**HAZARDOUS MATERIALS**

- Hazardous Materials Training (e.g. adhesives, solvents, chemicals, paint etc.)
- High-Voltage Battery and Systems Awareness

**MANUFACTURING SKILLS**

- Automotive/Electrical Safety
- Body Shop Equipment Operation/Maintenance
- Electro Mechanical/Maintenance Skills
- Engineering/Systems Skills
- Forklift Training
- Fuel Efficiency Best Practices
- Hybrid Vehicle Manufacturing/Assembly/Quality Control Processes
- Paint Equipment Operation
- Paint Quality, Defects, Prevention, Repair
- Paint Types and Application Techniques
- Lean Manufacturing
- Programmable Logic Control
- Welding Skills

**Productive Lab Hours**

0-60

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

- Body Shop Equipment Operation/Maintenance
- Paint Shop Equipment Operation/Maintenance
- Hybrid Vehicle Manufacturing and Assembly Processes
- Hybrid Vehicle Power Electronics
- Manufacturing Equipment Skills/ Maintenance
- Manufacturing Fit and Finish/Quality

**AT Hours**

0-200

**ADVANCED TECHNOLOGY** (Ratio 1:10)

- CAD Data Management
- CAD Clash Methodologies
- CAD Industry Best Practices to Increase Design Quality
- Computer Aided Three-dimensional Interactive Application
- Cisco Skills
- Citrix Skills
- CompTIA
- Computer-Aided Engineering
- Concurrent Engineering Skills
- Cybersecurity
- Design for Manufacturing/Design of Experiments
- Electric Vehicle Battery Applications
- Engineering Bill of Materials Management
- Failure Mode and Effects Analysis
- Geometric Dimensioning and Tolerancing
- High-Voltage Electronics Design and Management
- HVAC and Phase Change Thermodynamics
- Java Skills

- Manufacturing Automation and Robotics
- Microsoft Server
- N Code
- Nastran
- Power Electronics
- Product Change Management Process and Best Practices
- Product Lifecycle Management – Smarteam – Management of Product Data
- Programming Skills
- Red Hat/Linux
- SQL
- Vehicle Dynamics
- VMWare
- Web Development-.Net Security
- Windows 8 and 10 Network Management

### **CBT Hours\***

0-200

#### **BUSINESS SKILLS**

- Basics of Manufacturing Costs 140 (1.5 hours)
- Conflict Resolution for Different Groups 155 (1.5 hours)
- Conflict Resolution Principles 150 (1.5 hours)
- Essentials of Communication 120 (1.5 hours)
- Intro to Managerial Accounting 145 (1.5 hours)
- Personal Effectiveness 190 (1.5 hours)
- Product Design and Development 134 (1.5 hours)
- Quality and Customer Service 175 (1.5 hours)

#### **CONTINUOUS IMPROVEMENT**

- Continuous Process Improvement: Identifying and Eliminating Waste 125 (1.5 hours)
- Continuous Process Improvement: Managing Flow 124 (1.5 hours)
- Developing a Lean Culture 135 (1.5 hours)
- Essentials of Leadership 110 (1.5 hours)
- Management Tools: Problem Solving 270 (1.5 hours)
- Management Tools: Product and Process Design 275 (1.5 hours)
- Managing Performance: Best Practices 130 (1.5 hours)
- Managing Performance: Corrective Actions 135 (1.5 hours)
- Managing Practices for Total Quality 320 (1.5 hours)
- Process Design and Development 133 (1.5 hours)
- Process Flow Charting 241 (1.5 hours)
- Quality Overview 100 (1.5 hours)
- Team Leadership 160 (1.5 hours)

#### **MANUFACTURING SKILLS**

Additive Manufacturing:

- Additive Manufacturing as a Secondary Process 231 (1.5 hours)
- Additive Manufacturing Materials Science 211 (1.5 hours)
- Additive Manufacturing Methods and Materials 140 (1.5 hours)
- Additive Manufacturing Safety 120 (1.5 hours)
- Design for Additive Manufacturing 201 (1.5 hours)
- Integrating Additive Manufacturing with Traditional Manufacturing 221 (1.5 hours)

- Intro to Additive Manufacturing 110 (1.5 hours)
- The Basic Additive Manufacturing Process 130 (1.5 hours)

#### Adhesives:

- Basics of the Bonding Process 120 (1.5 hours)
- Intro to Adhesive Bonding 110 (1.5 hours)
- Intro to Adhesive Properties 130 (1.5 hours)
- Steps for Adhesive Application 220 (1.5 hours)
- Surface Preparation 210 (1.5 hours)
- Types of Adhesives 140 (1.5 hours)

#### Coatings:

- Coating Defects 150 (1.5 hours)
- Intro to Coating Composition 110 (1.5 hours)
- Processes for Applying Coatings 140 (1.5 hours)
- Surface Preparation for Coatings 120 (1.5 hours)

#### Composites:

- Advanced Materials for Composites 135 (1.5 hours)
- Advanced Thermoset Resins for Composites 130 (1.5 hours)
- Composite Inspection and Defect Prevention 240 (1.5 hours)
- Intro to Composites 110 (1.5 hours)
- Intro to Compression Molding 170 (1.5 hours)
- Intro to Lay-Up and Spray-Up Molding 140 (1.5 hours)
- Overview of Composite Processes 120 (1.5 hours)
- Repair Methods for Composites 250 (1.5 hours)
- Safety for Composite Processing 115 (1.5 hours)
- Surface Finishing Composites 190 (1.5 hours)
- Traditional Composites 125 (1.5 hours)
- Vacuum Bagging Technique: Single-Sided Bagging 230 (1.5 hours)

#### Computer Numerical Control:

- Basics of the CNC Lathe 211 (1.5 hours)
- Basics of the CNC Machining Center 130 (1.5 hours)
- Basics of the CNC Mill 212 (1.5 hours)
- Basics of the CNC Swiss-Type Lathe 135 (1.5 hours)
- CAD/CAM Overview 160 (1.5 hours)
- Canned Cycles 310 (1.5 hours)
- Canned Cycles for the Lathe 321 (1.5 hours)
- Canned Cycles for the Mill 322 (1.5 hours)
- CNC Coordinates 140 (1.5 hours)
- CNC Manual Operations 200 (1.5 hours)
- CNC Offsets 210 (1.5 hours)
- CNC Specs for the Lathe 225 (1.5 hours)
- CNC Specs for the Mill 220 (1.5 hours)
- Control Panel Functions for the CNC Lathe 251 (1.5 hours)
- Control Panel Functions for the CNC Mill 252 (1.5 hours)
- Coordinates for the CNC Lathe 221 (1.5 hours)
- Coordinates for the CNC Mill 222 (1.5 hours)
- Creating a CNC Milling Program 302 (1.5 hours)



- Creating a CNC Turning Program 301 (1.5 hours)
- Creating a Mazatrol Program for the Lathe 289 (1.5 hours)
- Creating a Mazatrol Program for the Mill 288 (1.5 hours)
- Creating a Milling Program 290 (1.5 hours)
- Creating a Turning Program 280 (1.5 hours)
- Haas Lathe: Control Panel Overview 255 (1.5 hours)
- Haas Lathe: Entering Offsets 265 (1.5 hours)
- Haas Lathe: First Part Runs 325 (1.5 hours)
- Haas Lathe: Locating Program Zero 275 (1.5 hours)
- Haas Lathe: Program Execution 285 (1.5 hours)
- Haas Lathe: Program Storage 315 (1.5 hours)
- Haas Mill: Control Panel Overview 250 (1.5 hours)
- Haas Mill: Entering Offsets 260 (1.5 hours)
- Haas Mill: First Part Runs 320 (1.5 hours)
- Haas Mill: Locating Program Zero 270 (1.5 hours)
- Haas Mill: Program Execution 280 (1.5 hours)
- Haas Mill: Program Storage 310 (1.5 hours)
- History and Definition of CNC 100 (1.5 hours)
- Introduction to CNC Machines 201 (1.5 hours)
- Mazak Lathe: Control Panel Overview 255 (1.5 hours)
- Mazak Lathe: Entering Offsets 285 (1.5 hours)
- Mazak Lathe: First Part Runs 325 (1.5 hours)
- Mazak Lathe: Locating Program Zero 275 (1.5 hours)
- Mazak Lathe: Program Execution 295 (1.5 hours)
- Mazak Lathe: Program Storage 315 (1.5 hours)
- Mazak Lathe: Safety for the Lathe 265 (1.5 hours)
- Mazak Mill: Control Panel Overview 250 (1.5 hours)
- Mazak Mill: Entering Offsets 280 (1.5 hours)
- Mazak Mill: First Part Runs 320 (1.5 hours)
- Mazak Mill: Locating Program Zero 270 (1.5 hours)
- Mazak Mill: Program Execution 290 (1.5 hours)
- Mazak Mill: Program Storage 310 (1.5 hours)
- Mazak Mill: Safety for the Mill 260 (1.5 hours)
- Mechanics of CNC 110 (1.5 hours)
- Milling Calculations 295 (1.5 hours)
- Offsets on the CNC Lathe 261 (1.5 hours)
- Offsets on the CNC Mill 262 (1.5 hours)
- Part Program 150 (1.5 hours)
- Turning Calculations 285 (1.5 hours)

#### Electrical Power:

- AC Fundamentals 210 (1.5 hours)
- AC Fundamentals 241 (1.5 hours)
- AC Power Sources 235 (1.5 hours)
- AC Power Sources 281 (1.5 hours)
- Battery Selection 250 (1.5 hours)
- Battery Selection 321 (1.5 hours)
- Conductor Selection 240 (1.5 hours)
- Conductor Selection 291 (1.5 hours)

- DC Circuit Components 140 (1.5 hours)
- DC Circuit Components 221 (1.5 hours)
- DC Power Sources 230 (1.5 hours)
- DC Power Sources 271 (1.5 hours)
- Electrical Instruments 220 (1.5 hours)
- Electrical Instruments 251 (1.5 hours)
- Electrical Print Reading 225 (1.5 hours)
- Electrical Print Reading 261 (1.5 hours)
- Electrical Units 101 (1.5 hours)
- Electrical Units 110 (1.5 hours)
- Intro to Circuits 120 (1.5 hours)
- Intro to Magnetism 130 (1.5 hours)
- NEC Overview 150 (1.5 hours)
- Parallel Circuit Calculations 205 (1.5 hours)
- Parallel Circuit Calculations 311 (1.5 hours)
- Safety for Electric Work 115 (1.5 hours)
- Safety for Electrical Work 111 (1.5 hours)
- Series Circuit Calculations 200 (1.5 hours)
- Series Circuit Calculations 301 (1.5 hours)

#### Fasteners:

- Intro to Assembly 100 (1.5 hours)
- Intro to Fastener Ergonomics 130 (1.5 hours)
- Intro to Fastener Threads 110 (1.5 hours)
- Overview of Non-Threaded Fasteners 125 (1.5 hours)
- Overview of Threaded Fasteners 117 (1.5 hours)
- Properties for Fasteners 200 (1.5 hours)
- Safety for Assembly 105 (1.5 hours)
- Threaded Fastener Selection 215 (1.5 hours)
- Tools for Threaded Fasteners 120 (1.5 hours)
- Understanding Torque 210 (1.5 hours)

#### Hydraulics and Pneumatics

- Actuator Applications 240 (1.5 hours)
- Basic Hydraulic Circuit Design 310 (1.5 hours)
- Basic Pneumatic Circuit Design 315 (1.5 hours)
- Contamination and Filter Selection 330 (1.5 hours)
- Fluid System Print Reading 220 (1.5 hours)
- Hydraulic Control Valves 230 (1.5 hours)
- Hydraulic Fluid Selection 320 (1.5 hours)
- Hydraulic Power Sources 210 (1.5 hours)
- Hydraulic Power Sources 302 (1.5 hours)
- Hydraulic Power Variables 200 (1.5 hours)
- Hydraulic Principles and System Design 340 (1.5 hours)
- Intro to Fluid Conductors 130 (1.5 hours)
- Intro to Hydraulic Components 120 (1.5 hours)
- Intro to Pneumatic Components 125 (1.5 hours)
- Pneumatic Control Valves 235 (1.5 hours)
- Pneumatic Control Valves 351 (1.5 hours)

- Pneumatic Power Sources 215 (1.5 hours)
- Pneumatic Power Sources 312 (1.5 hours)
- Pneumatic Power Variables 205 (1.5 hours)
- Pneumatic Power Variables 311 (1.5 hours)
- Safety for Hydraulics and Pneumatics 105 (1.5 hours)
- Safety for Hydraulics and Pneumatics 211 (1.5 hours)
- The Forces of Fluid Power 110 (1.5 hours)
- The Forces of Fluid Power 201 (1.5 hours)

#### Inspection Skills:

- Advanced Hole Inspection 341 (1.5 hours)
- Basic Measurement 101 (1.5 hours)
- Basic Measurement 110 (1.5 hours)
- Basics of the CMM 120 (1.5 hours)
- Basics of the Optical Comparator 130 (1.5 hours)
- Calculations for Programming the Mill 312 (1.5 hours)
- Calibration and Documentation 371 (1.5 hours)
- Calibration Fundamentals 111 (1.5 hours)
- Calibration Fundamentals 210 (1.5 hours)
- Hardness Testing 221 (1.5 hours)
- Hardness Testing 260 (1.5 hours)
- Hole Inspection 240 (1.5 hours)
- Hole Standards and Inspection 141 (1.5 hours)
- In-Line Inspection Applications 381 (1.5 hours)
- Inspecting a Cylindrical Part 331 (1.5 hours)
- Inspecting a Prismatic Part 321 (1.5 hours)
- Inspecting with CMMs 220 (1.5 hours)
- Inspecting with CMMs 361 (1.5 hours)
- Inspecting with Optical Comparators 230 (1.5 hours)
- Inspecting with Optical Comparators 351 (1.5 hours)
- Linear Instrument Characteristics 115 (1.5 hours)
- Measuring System Analysis 300 (1.5 hours)
- Overview of Threads 150 (1.5 hours)
- Surface Measurement 140 (1.5 hours)
- Surface Texture and Inspection 201 (1.5 hours)
- Thread Inspection 250 (1.5 hours)
- Thread Standards and Inspection 151 (1.5 hours)

#### Manufacturing Process Skills:

- Algebra Fundamentals 141 (1.5 hours)
- Applied and Engineering Sciences 110 (1.5 hours)
- Approaches to Maintenance 120 (1.5 hours)
- Approaches to Maintenance 131 (1.5 hours)
- Automated Systems and Control 135 (1.5 hours)
- Band Saw Operation 211 (1.5 hours)
- Basic Cutting Theory 201 (1.5 hours)
- Basic Grinding Theory 221 (1.5 hours)
- Basics of the Centerless Grinder 233 (1.5 hours)
- Basics of the CNC Turning Center 120 (1.5 hours)
- Basics of the Cylindrical Grinder 232 (1.5 hours)

- Basics of the Engine Lathe 115 (1.5 hours)
- Basics of the Manual Mill 110 (1.5 hours)
- Basics of the Surface Grinder 231 (1.5 hours)
- Basics of Tolerance 120 (1.5 hours)
- Basics of Tolerance 121 (1.5 hours)
- Benchwork and Layout Operations 210 (1.5 hours)
- Benchwork and Layout Operations 241 (1.5 hours)
- Blueprint Reading 130 (1.5 hours)
- Blueprint Reading 131 (1.5 hours)
- Cell Design and Pull Systems 161 (1.5 hours)
- Centerless Grinder Operation 253 (1.5 hours)
- Centerless Grinder Operation 260 (1.5 hours)
- Concepts of Calculus 310 (1.5 hours)
- Cylindrical Grinder Operation 250 (1.5 hours)
- Cylindrical Grinder Operation 252 (1.5 hours)
- Distribution Systems 221 (1.5 hours)
- Distribution Systems 320 (1.5 hours)
- Dressing and Truing 230 (1.5 hours)
- Dressing and Truing 341 (1.5 hours)
- Drill Bushing Selection 230 (1.5 hours)
- Drill Tool Geometry 371 (1.5 hours)
- Engine Lathe Basics 211 (1.5 hours)
- Engine Lathe Operation 225 (1.5 hours)
- Engine Lathe Setup 231 (1.5 hours)
- Equipment/Tool Design and Development 137 (1.5 hours)
- Essentials of Heat Treatment of Steel 211 (1.5 hours)
- Exotic Alloys 301 (1.5 hours)
- Fanuc Lathe: Control Panel Overview 255 (1.5 hours)
- Fanuc Lathe: Entering Offsets 265 (1.5 hours)
- Fanuc Lathe: First Part Runs 325 (1.5 hours)
- Fanuc Lathe: Locating Program Zero 275 (1.5 hours)
- Fanuc Lathe: Program Execution 285 (1.5 hours)
- Fanuc Lathe: Program Storage 315 (1.5 hours)
- Fanuc Mill: Control Panel Overview 250 (1.5 hours)
- Fanuc Mill: Entering Offsets 260 (1.5 hours)
- Fanuc Mill: First Part Runs 320 (1.5 hours)
- Fanuc Mill: Locating Program Zero 270 (1.5 hours)
- Fanuc Mill: Program Execution 280 (1.5 hours)
- Fanuc Mill: Program Storage 310 (1.5 hours)
- Fittings for Fluid Systems 135 (1.5 hours)
- Fittings for Fluid Systems 251 (1.5 hours)
- Flammable/Combustible Liquids 191 (1.5 hours)
- Forces of Machines 121 (1.5 hours)
- Geometry Fundamentals for Welding 171 (1.5 hours)
- Geometry: Circles and Polygons 171 (1.5 hours)
- Geometry: Circles and Polygons 185 (1.5 hours)
- Geometry: Lines and Angles 151 (1.5 hours)
- Geometry: Lines and Angles 155 (1.5 hours)
- Geometry: Triangles 161 (1.5 hours)

- Geometry: Triangles 165 (1.5 hours)
- Hand and Power Tool Safety 145 (1.5 hours)
- Hand and Power Tool Safety 201 (1.5 hours)
- Holemaking on the Manual Mill 271 (1.5 hours)
- Holemaking on the Mill 230 (1.5 hours)
- Impact of Workpiece Materials 391 (1.5 hours)
- Industrial Network Integration 260 (1.5 hours)
- Interpreting Blueprints 230 (1.5 hours)
- Interpreting GD&T 310 (1994) (1.5 hours)
- Interpreting GD&T 315 (2009) (1.5 hours)
- Intro to Abrasives 100 (1.5 hours)
- Intro to EDM 100 (1.5 hours)
- Intro to Fluid Systems 100 (1.5 hours)
- Intro to GD&T 200 (1994) (1.5 hours)
- Intro to GD&T 205 (2009) (1.5 hours)
- Intro to Six Sigma 170 (1.5 hours)
- Intro to Six Sigma 171 (1.5 hours)
- Introduction to CAD and CAM for Machining 241 (1.5 hours)
- Introduction to Circuits 201 (1.5 hours)
- Introduction to Electric Motors 301 (1.5 hours)
- Introduction to Fluid Conductors 241 (1.5 hours)
- Introduction to GD&T 301 (1.5 hours)
- Introduction to Grinding Fluids 261 (1.5 hours)
- Introduction to Hydraulic Components 221 (1.5 hours)
- Introduction to Magnetism 211 (1.5 hours)
- Introduction to Mechanical Properties 111 (1.5 hours)
- Introduction to Mechanical Systems 101 (1.5 hours)
- Introduction to Metal Cutting Fluids 221 (1.5 hours)
- Introduction to Metals 121 (1.5 hours)
- Introduction to Physical Properties 101 (1.5 hours)
- Introduction to Plastics 131 (1.5 hours)
- Introduction to Pneumatic Components 231 (1.5 hours)
- Lathe Tool Geometry 351 (1.5 hours)
- Major Rules of GD&T 311 (1.5 hours)
- Manual Mill Basics 201 (1.5 hours)
- Manual Mill Operation 220 (1.5 hours)
- Manual Mill Operation 251 (1.5 hours)
- Manual Mill Setup 221 (1.5 hours)
- Manufacturing Management 180 (1.5 hours)
- Manufacturing Process Applications: Part I 124 (1.5 hours)
- Manufacturing Process Applications: Part II 125 (1.5 hours)
- Math Fundamentals 101 (1.5 hours)
- Math Fundamentals for Welding 161 (1.5 hours)
- Math: Fractions and Decimals 105 (1.5 hours)
- Math: Fractions and Decimals 111 (1.5 hours)
- Math: Fundamentals 100 (1.5 hours)
- Math: Units of Measurement 115 (1.5 hours)
- Metal Cutting Fluid Safety 231 (1.5 hours)
- Mill Tool Geometry 361 (1.5 hours)

- NEC(R) Overview 231 (1.5 hours)
- Optimizing Tool Life and Process 381 (1.5 hours)
- Overview of Engine Lathe Setup 205 (1.5 hours)
- Overview of Exotic Metals 225 (1.5 hours)
- Overview of Machine Tools 121 (1.5 hours)
- Overview of Manual Mill Setup 200 (1.5 hours)
- Power Transmission Components 120 (1.5 hours)
- Powered Industrial Truck Safety 210 (1.5 hours)
- Powered Industrial Truck Safety 221 (1.5 hours)
- Preventive Maintenance for Fluid Systems 140 (1.5 hours)
- Preventive Maintenance for Fluid Systems 261 (1.5 hours)
- Production System Design and Development 136 (1.5 hours)
- Setup for Centerless Grinders 320 (1.5 hours)
- Setup for the Centerless Grinder 243 (1.5 hours)
- Setup for the Cylindrical Grinder 242 (1.5 hours)
- Setup for the Surface Grinder 241 (1.5 hours)
- Shop Algebra Overview 200 (1.5 hours)
- Shop Geometry Overview 170 (1.5 hours)
- Shop Trig Overview 210 (1.5 hours)
- Siemens Human Machine Interfaces 250 (1.5 hours)
- Siemens Safety Integrated for Factory Automation 360 (1.5 hours)
- Specs for Servomotors 330 (1.5 hours)
- Speed and Feed for the Lathe 301 (1.5 hours)
- Speed and Feed for the Mill 311 (1.5 hours)
- Spring Applications 231 (1.5 hours)
- Statistics 220 (1.5 hours)
- Statistics 231 (1.5 hours)
- Strategies for Setup Reduction 251 (1.5 hours)
- Surface Grinder Operation 240 (1.5 hours)
- Surface Grinder Operation 251 (1.5 hours)
- Symbols and Diagrams for Motors 311 (1.5 hours)
- Taper Turning on the Engine Lathe 240 (1.5 hours)
- Thermoplastics 251 (1.5 hours)
- Thermosets 261 (1.5 hours)
- Threading on the Engine Lathe 235 (1.5 hours)
- Trig: Pythagorean Theorem 205 (1.5 hours)
- Trig: Sine Bar Applications 225 (1.5 hours)
- Trig: Sine, Cosine and Tangent 215 (1.5 hours)
- Trigonometry: Sine Bar Applications 221 (1.5 hours)
- Trigonometry: Sine, Cosine, Tangent 211 (1.5 hours)
- Trigonometry: The Pythagorean Theorem 201 (1.5 hours)
- Troubleshooting 181 (1.5 hours)
- Troubleshooting Coating Defects 170 (1.5 hours)
- Troubleshooting: Identifying Problems 180 (1.5 hours)
- Troubleshooting: Taking Corrective Actions 184 (1.5 hours)
- Troubleshooting: Understanding Causes and Effects 182 (1.5 hours)
- TS 16949:2009 Overview 220 (1.5 hours)
- TS 16949:2009 Overview 221 (1.5 hours)
- Units of Measurement 112 (1.5 hours)

- What Is Grinding? 110 (1.5 hours)

#### Materials Processing:

- Ceramics 250 (1.5 hours)
- Ferrous Metals and Alloys 210 (1.5 hours)
- Heat Treatment of Steel 230 (1.5 hours)
- Intro to Materials 100 (1.5 hours)
- Mechanical Properties of Metals 120 (1.5 hours)
- Metal Classification 150 (1.5 hours)
- Metal Manufacturing 140 (1.5 hours)
- Nonferrous Metals 241 (1.5 hours)
- Nonferrous Metals and Alloys 220 (1.5 hours)
- Overview of Plastic Materials 115 (1.5 hours)
- Overview of Plastic Processes 145 (1.5 hours)
- Overview of Properties for Plastics 135 (1.5 hours)
- Physical Properties of Metals 130 (1.5 hours)
- Plastics 240 (1.5 hours)
- Principles of Injection Molding 255 (1.5 hours)
- Principles of Thermoforming 265 (1.5 hours)
- Structure of Metals 110 (1.5 hours)

#### Mechanical Systems:

- Bearing Applications 210 (1.5 hours)
- Bearing Applications 221 (1.5 hours)
- Belt Drive Applications 230 (1.5 hours)
- Belt Drive Applications 241 (1.5 hours)
- Clutch and Brake Applications 250 (1.5 hours)
- Forces of Machines 110 (1.5 hours)
- Gear Applications 245 (1.5 hours)
- Gear Applications 251 (1.5 hours)
- Gear Geometry 240 (1.5 hours)
- Gear Geometry 261 (1.5 hours)
- Intro to Mechanical Systems 100 (1.5 hours)
- Lubricant Fundamentals 130 (1.5 hours)
- Mechanical Power Variables 200 (1.5 hours)
- Safety for Mechanical Work 105 (1.5 hours)
- Safety for Mechanical Work 111 (1.5 hours)
- Spring Applications 220 (1.5 hours)

#### Metal Stamping Press/Metalworking:

- ANSI Insert Selection 250 (1.5 hours)
- ANSI Insert Selection 341 (1.5 hours)
- Band Saw Blade Selection 215 (1.5 hours)
- Carbide Grade Selection 230 (1.5 hours)
- Carbide Grade Selection 331 (1.5 hours)
- Chucks, Collets, and Vises 110 (1.5 hours)
- Clamping Basics 108 (1.5 hours)
- Classification of Steel 201 (1.5 hours)
- Cutting Fluids 210 (1.5 hours)
- Cutting Processes 111 (1.5 hours)

- Cutting Processes 140 (1.5 hours)
- Cutting Tool Materials 220 (1.5 hours)
- Cutting Tool Materials 321 (1.5 hours)
- Cutting Variables 200 (1.5 hours)
- Drill Geometry 247 (1.5 hours)
- Fixture Body Construction 200 (1.5 hours)
- Fixture Design Basics 210 (1.5 hours)
- Hard Turning 315 (1.5 hours)
- High-Speed Machining 310 (1.5 hours)
- Intro to Screw Machining 160 (1.5 hours)
- Intro to Workholding 104 (1.5 hours)
- Locating Devices 107 (1.5 hours)
- Machines for Metal Cutting 130 (1.5 hours)
- Machining Titanium Alloys 325 (1.5 hours)
- Metal Removal Processes 110 (1.5 hours)
- Milling Geometry 245 (1.5 hours)
- Optimizing Insert Life 305 (1.5 hours)
- Safety for Metal Cutting 101 (1.5 hours)
- Safety for Metal Cutting 115 (1.5 hours)
- Sawing Fundamentals 155 (1.5 hours)
- Speed and Feed Selection 300 (1.5 hours)
- Supporting and Locating Principles 106 (1.5 hours)
- Tool Geometry 240 (1.5 hours)
- Toolholders for Turning 260 (1.5 hours)
- What Is Cutting? 120 (1.5 hours)

#### Motor Controls:

- AC Motor Applications 240 (1.5 hours)
- AC Motor Applications 322 (1.5 hours)
- Acceleration Methods 385 (1.5 hours)
- Contactors and Motor Starters 250 (1.5 hours)
- Control Devices 211 (1.5 hours)
- Control Devices 260 (1.5 hours)
- DC Motor Applications 230 (1.5 hours)
- DC Motor Applications 321 (1.5 hours)
- Deceleration Methods 380 (1.5 hours)
- Electronic Semiconductor Devices 350 (1.5 hours)
- Intro to Electric Motors 200 (1.5 hours)
- Limit Switches and Proximity Sensors 231 (1.5 hours)
- Limit Switches and Proximity Sensors 360 (1.5 hours)
- Logic and Line Diagrams 220 (1.5 hours)
- Logic and Line Diagrams 312 (1.5 hours)
- Photoelectric and Ultrasonic Devices 365 (1.5 hours)
- Photonic Semiconductor Devices 355 (1.5 hours)
- Reduced Voltage Starting 370 (1.5 hours)
- Relays, Contactors, and Motor Starters 201 (1.5 hours)
- Reversing Motor Circuits 310 (1.5 hours)
- Solenoids 235 (1.5 hours)
- Solenoids 331 (1.5 hours)



- Solid-State Relays and Starters 375 (1.5 hours)
- Symbols and Diagrams for Motors 210 (1.5 hours)
- Timers and Counters 340 (1.5 hours)

Press Brakes:

- Bending Fundamentals 120 (1.5 hours)
- Die Bending Operations 130 (1.5 hours)
- Operating the Press Brake 200 (1.5 hours)
- Press Brake Components 110 (1.5 hours)
- Press Brake Safety 100 (1.5 hours)
- Press Brake Specifications 220 (1.5 hours)

Programmable Logic Controllers:

- Additional Function Block Diagram Instructions for Siemens PLCs 330 (1.5 hours)
- Additional Ladder Diagram Instructions for Siemens PLCs 320 (1.5 hours)
- Basic Function Block Diagram Programming for Siemens PLCs 290 (1.5 hours)
- Basic Ladder Diagram Programming for Siemens PLCs 280 (1.5 hours)
- Basic Programming 250 (1.5 hours)
- Basics of G Code Programming 231 (1.5 hours)
- Basics of Ladder Logic 220 (1.5 hours)
- Basics of Siemens PLCs 200 (1.5 hours)
- Data Manipulation 360 (1.5 hours)
- Function Block Diagram Timers and Counters for Siemens PLCs 310 (1.5 hours)
- Hand-Held Programmable Controllers of PLCs 280 (1.5 hours)
- Hardware for PLCs 210 (1.5 hours)
- Intro to PLCs 200 (1.5 hours)
- Ladder Diagram Timers and Counters for Siemens PLCs 300 (1.5 hours)
- Math for PLCs 320 (1.5 hours)
- Networking for PLCs 270 (1.5 hours)
- Numbering Systems and Codes 230 (1.5 hours)
- Numbers, Codes, and Data Types for Siemens PLCs 220 (1.5 hours)
- Overview of PLC Registers 305 (1.5 hours)
- PID for PLCs 350 (1.5 hours)
- PLC Diagrams and Programs 300 (1.5 hours)
- PLC Inputs and Outputs 240 (1.5 hours)
- PLC Installation Practices 340 (1.5 hours)
- PLC Program Control Instructions 310 (1.5 hours)
- PLC Timers and Counters 260 (1.5 hours)
- Sequencer Instructions for PLCs 330 (1.5 hours)
- Shift Registers 370 (1.5 hours)
- Siemens PLC Communication 230 (1.5 hours)
- Siemens PLC Hardware 210 (1.5 hours)
- Siemens PLC Inputs and Outputs 240 (1.5 hours)
- Siemens PLC Programming Concepts 270 (1.5 hours)
- Siemens SIMATIC Modular PLCs 260 (1.5 hours)
- Siemens SIMATIC S7-1200 PLCs 340 (1.5 hours)
- Siemens SIMATIC S7-1500 PLCs 350 (1.5 hours)

### Quality and Testing:

- 5S Overview 151 (1.5 hours)
- 5S Overview 155 (1.5 hours)
- Approaches to Quality Management 255 (1.5 hours)
- Cell Design and Pull Systems 160 (1.5 hours)
- Conducting an Internal Audit 200 (1.5 hours)
- Conducting an Internal Audit 201 (1.5 hours)
- Conducting Kaizen Events 191 (1.5 hours)
- Conducting Kaizen Events 260 (1.5 hours)
- Creating an EIA/ISO Program for the Mazak Lathe 287 (1.5 hours)
- Creating an EIA/ISO Program for the Mazak Mill 286 (1.5 hours)
- Intro to Machine Rigging 110 (1.5 hours)
- Intro to Supply Chain Management 140 (1.5 hours)
- ISO 9000 Overview 110 (1.5 hours)
- ISO 9000 Review 121 (1.5 hours)
- ISO 9001:2015 Review 122 (1.5 hours)
- Lifting and Moving Equipment 130 (1.5 hours)
- Process Flow Charting 240 (1.5 hours)
- Rigging Equipment 120 (1.5 hours)
- Rigging Inspection and Safety 210 (1.5 hours)
- Rigging Mechanics 220 (1.5 hours)
- Six Sigma Goals and Tools 310 (1.5 hours)
- SPC Overview 210 (1.5 hours)
- SPC Overview 211 (1.5 hours)
- Strategies for Setup Reduction 250 (1.5 hours)
- Total Productive Maintenance 141 (1.5 hours)
- Total Productive Maintenance Overview 150 (1.5 hours)
- Total Quality Management Overview 261 (1.5 hours)
- Value Stream Mapping: The Current State 301 (1.5 hours)
- Value Stream Mapping: The Future State 305 (1.5 hours)
- Value Stream Mapping: The Future State 311 (1.5 hours)
- Value Stream Mapping: The Present State 300 (1.5 hours)

### Robotics

- Applications for Robots 130 (1.5 hours)
- Concepts of Robot Programming 210 (1.5 hours)
- End Effectors 125 (1.5 hours)
- Intro to Robotics 110 (1.5 hours)
- Robot Axes 140 (1.5 hours)
- Robot Components 120 (1.5 hours)
- Robot Installations 230 (1.5 hours)
- Robot Maintenance 170 (1.5 hours)
- Robot Safety 115 (1.5 hours)
- Robot Safety 211 (1.5 hours)
- Robot Sensors 150 (1.5 hours)
- Robot Troubleshooting 160 (1.5 hours)
- Robot Troubleshooting 331 (1.5 hours)
- Robotic Control Systems 240 (1.5 hours)
- Robotic Drives, Hardware and Components 220 (1.5 hours)

- Vision Systems 250 (1.5 hours)

Soldering/Welding:

- Advanced GMAW Applications 302 (1.5 hours)
- Arc Welding Aluminum Alloys 310 (1.5 hours)
- Arc Welding Power Sources 260 (1.5 hours)
- Arc Welding Processes 120 (1.5 hours)
- Arc Welding Safety 115 (1.5 hours)
- Arc Welding Symbols and Codes 250 (1.5 hours)
- Coil Handling Equipment 140 (1.5 hours)
- Coil Loading Procedures 250 (1.5 hours)
- Die Cutting Variables 200 (1.5 hours)
- Die Setting Procedures 300 (1.5 hours)
- Electrical Power for Arc Welding 140 (1.5 hours)
- Electrical Power for Arc Welding 241 (1.5 hours)
- Electrical Safety for Welding 131 (1.5 hours)
- Electrode Selection 270 (1.5 hours)
- Fabrication Process 232 (1.5 hours)
- FCAW Applications 230 (1.5 hours)
- FCAW Applications 321 (1.5 hours)
- Ferrous Metals 231 (1.5 hours)
- Ferrous Metals for Welding 200 (1.5 hours)
- GMAW Applications 220 (1.5 hours)
- GMAW Applications 301 (1.5 hours)
- Grinding Ferrous Metals 311 (1.5 hours)
- Grinding Nonferrous Materials 321 (1.5 hours)
- Grinding Processes 120 (1.5 hours)
- Grinding Processes 201 (1.5 hours)
- Grinding Safety 211 (1.5 hours)
- Grinding Variables 200 (1.5 hours)
- Grinding Variables 301 (1.5 hours)
- Grinding Wheel Geometry 220 (1.5 hours)
- Grinding Wheel Geometry 361 (1.5 hours)
- Grinding Wheel Materials 210 (1.5 hours)
- Grinding Wheel Materials 331 (1.5 hours)
- Grinding Wheel Selection 351 (1.5 hours)
- GTAW Applications 240 (1.5 hours)
- GTAW Applications 331 (1.5 hours)
- Guiding System Components 230 (1.5 hours)
- Intro to Submerged Arc Welding 160 (1.5 hours)
- Introduction to Automation 291 (1.5 hours)
- Introduction to FCAW 261 (1.5 hours)
- Introduction to GMAW 251 (1.5 hours)
- Introduction to GTAW 262 (1.5 hours)
- Introduction to SMAW 252 (1.5 hours)
- Introduction to Welding 141 (1.5 hours)
- Introduction to Welding Processes 151 (1.5 hours)
- Lead-Free Soldering 230 (1.5 hours)
- Material Tests for Welding 201 (1.5 hours)

- Monitoring Press Operations 220 (1.5 hours)
- Nonferrous Metals for Welding 205 (1.5 hours)
- Overview of Soldering 271 (1.5 hours)
- Overview of Weld Defects 222 (1.5 hours)
- Overview of Weld Types 130 (1.5 hours)
- Overview of Weld Types 221 (1.5 hours)
- Oxyfuel Cutting Applications 282 (1.5 hours)
- Oxyfuel Welding Applications 207 (1.5 hours)
- Oxyfuel Welding Safety 105 (1.5 hours)
- Plasma Cutting 265 (1.5 hours)
- Plasma Cutting 283 (1.5 hours)
- PPE for Welding 111 (1.5 hours)
- Press Basics 110 (1.5 hours)
- Punch and Die Operations 120 (1.5 hours)
- Safety for Soldering 115 (1.5 hours)
- SAW Applications 255 (1.5 hours)
- SMAW Applications 210 (1.5 hours)
- SMAW Applications 311 (1.5 hours)
- Solder and Flux Selection 210 (1.5 hours)
- Soldering Applications 200 (1.5 hours)
- Soldering Equipment 130 (1.5 hours)
- Soldering PCBs 220 (1.5 hours)
- Stamping Safety 115 (1.5 hours)
- Stripper System Components 235 (1.5 hours)
- Thermal Cutting Overview 281 (1.5 hours)
- Visual Inspection of Welds 280 (1.5 hours)
- Welding Ferrous Metals 211 (1.5 hours)
- Welding Fumes and Gases Safety 121 (1.5 hours)
- Welding Nonferrous Metals 212 (1.5 hours)
- Welding Safety Essentials 101 (1.5 hours)
- Welding Symbols and Codes 231 (1.5 hours)
- What Is Arc Welding? 110 (1.5 hours)
- What Is Oxyfuel Welding? 100 (1.5 hours)
- What Is Soldering? 110 (1.5 hours)

\*Safety training (class + CBT) 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. PL is capped at 60 total training hours per trainee.



**TRAINING PROPOSAL FOR**  
**Orange County Global Medical Center, Inc.**  
**17-0802**

**Panel Meeting Date:** 03/23/2018  
**Regional Office:** San Diego Regional Office  
**Analyst Name:** Maria Ibarra  
**Type of Proposal:** Single Employer  
**Funding Source:** SET

**FUNDING OVERVIEW**

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

<b>TOTAL ETP FUNDING:</b>		<b>\$425,700.00</b>	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$491,040.00	N/A	\$65,340 (30% - Santa Ana)	\$500,000.00

**APPLICANT PROFILE**

<b>Company Summary</b>	KPC Group own businesses in healthcare, pharmaceuticals, education, engineering, and real estate. The Company's healthcare division, KPC Health ( <a href="http://www.kpchealth.com">www.kpchealth.com</a> ), has an established group of integrated healthcare delivery systems consisting of acute care hospitals, Independent Physicians Associations (IPAs), medical groups, urgent care facilities, and various fully integrated multi-specialty medical facilities throughout California.
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<b>Industry Sector(s)</b>	Healthcare		
<b>Priority Industry</b>	Yes		
<b>No. Employees (Applicant)</b>	<b>State:</b> 2,406	<b>US:</b> 2,406	<b>World Wide:</b> 2,406
<b>Turnover Rate (Applicant)</b>	17.00%		

<b>Repeat Contractor</b>	Yes
<b>High Unemployment Area</b>	No
<b>Union(s)</b>	California Nurses Association; Service Employees International Union.

**TRAINING PROFILE**

<b>Training Objective(s)</b>	Through four of its acute care hospitals, KPC Health plans to deliver a comprehensive training package to its nurses and other allied healthcare staff in various Computer, Continuous Improvement, and Medical Skills training. Training will provide workers with improved skills in all areas of patient care to successfully support the Hospitals' new and upgraded programs and services to remain in compliance with changing regulatory standards while maintaining high level of patient care and overall patient satisfaction.
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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	496	\$ 18.00	55	\$ 990	8 - 200

\*For Substantial Contribution, Cost per Trainee will be reduced as shown in the total funding amount.

# PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

## 1. Company Background

Founded in 2003 and headquartered in Santa Ana, KPC Health operates seven autonomous acute care hospitals located throughout Southern California. Orange County Global Medical Center, Inc. (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).

All four affiliates have participated in prior ETP projects (see Previous ETP Project Summary section). The hospitals are located in the cities of Anaheim, Santa Ana, and Orange. Accredited by the Joint Commission on Accreditation of Hospital Organizations, the hospitals have a total of 763 licensed beds and provide medical/surgical, obstetric, geriatric, psychiatric, radiology, respiratory therapy, clinical laboratory, pharmacy, and physical/occupational therapy services on an inpatient/outpatient basis. Orange County Global is also designated as a burn center; neurosurgical, stroke, and paramedic base station receiving center; and open-heart surgical center that provides emergency and scheduled neurosurgical care and cardiac surgical services to economically depressed area population.

The Hospitals are eligible for ETP funding under Special Employment Training (SET) provisions for frontline workers.

## 2. Current Training Project Details

Provided here are details on the purpose of the training, a summary of the marketing plan and support costs.

<b>Purpose of Training</b>	<p>In its previous ETP projects, each hospital was able to provide critical skills training to its incumbent and newly-hired experienced Registered Nurses (RNs) and other allied healthcare staff necessary to assume responsibilities working in specialized units. The hospitals were able to provide in-depth Medical Skills (MS) training to New Graduate RNs filling key positions vacated by retired nurses. Training supported strategic plan to keep pace with technological advancements, improve patient care, increase nurse retention rates, as well as maintain certification requirements to support continuous quality healthcare improvements.</p> <p>Hospital administrators reported that KPC Health faces ongoing and uncertain regulatory changes with the current Affordable Care Act and future changes to the healthcare system. The prospective healthcare law will reduce medical reimbursement from Medicaid and private insurance companies as well as reduce Medical payments to hospitals that provide lower-quality service or have high admission rates. Consequently, the healthcare reform will result in an increased patient population, staffing requirements, and cost levels.</p>
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## PROPOSED TRAINING PROJECT DETAILS

	<p>To address these challenges, the Hospitals must continue to focus on keeping pace with changing clinical protocols brought by the aforementioned legislative regulations and standards. In order to successfully support regulatory changes and remain in compliance, the Orange County Global has committed to implement the following technological advancement and process improvements in the next two years:</p> <ol style="list-style-type: none"> <li>1. Implementation of ICD-10 coding upgrades, mandated by the Center of Medicare and Medicaid Services (CMS), to be used by all business staff and medical coders for accurate billing;</li> <li>2. Full implementation of the Company's Electronic Medical Records (EMR) to comply with Meaningful Use required by CMS and Accountable Care Organizations;</li> <li>3. New technology and equipment in Intensive Care, Emergency Department, Catheterization Laboratory, and Electrophysiology Units; and</li> <li>4. Continue to fill positions that will soon be vacated by nursing workforce nearing retirement age, specifically, in the Hospitals' specialized units such as Obstetrics, Intensive Care, Emergency, and Operating Room.</li> </ol> <p>Further, in this proposal, the hospitals will continue to achieve their business goals of maintaining a high performing workplace, improved patient care, and the promotion employee skills. Some training provided in previous contracts will be provided in this training plan. However, training will not be delivered to the same incumbent workers that participated in prior contracts. The proposal's Agreement amount reflects both the need and achieved cumulative past earnings.</p>
<b>Training Infrastructure and Administrative Plan</b>	<p>Orange County Global's Contracting Manager will oversee the overall ETP project as well as meet with ETP staff during monitoring activities. The Company will also designate each hospital's Education Department Staff to schedule and implement training as well as designate other administrative staff to enroll trainees; collect and maintain training rosters; and track training hours in the ETP online system. Training will be delivered by in-house trainers. The services of a training vendor may be attained at a later date if the need arises.</p>
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A



## PROPOSED TRAINING PROJECT DETAILS

<b>Substantial Contribution Description</b>	All four hospitals have participated in prior ETP Agreements. Orange County Global (Santa Ana) is the only repeat contractor with payment earned (incumbent earnings) in excess of \$250,000 at the same location within the last five years (see Past Contract Activity Table). Orange County Global had a prior Substantial Contribution of 15% (for the Santa Ana facility). Accordingly, reimbursement for trainees (all incumbent retrainees) at this facility will be reduced by 30%, to reflect the Hospital's \$65,340 Substantial Contribution to the cost of training.
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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	Classroom/Simulated Laboratory
<b>Summary</b>	
Training in Computer, Continuous Improvement, and Medical Skills will be provided to approximately 496 existing and newly-hired healthcare workers.	

Delivery Method/Level	Productive Laboratory
<b>Summary</b>	
Training in Medical Skills delivered by a Clinical Preceptor will be provided to approximately 496 existing and newly-hired healthcare workers.	

### 4. Additional Company or Training Project Details

Provided here is additional information relative to the proposed Training Project.

#### Medical Skills

This program provides funding for nurses and allied healthcare occupations with a Reimbursement Rate of \$22 for clinical didactic training and clinical preceptor model.

Medical Skills (MS) training is crucial in supporting the hospital's new and upgraded healthcare programs and services as well as meeting new regulations and standards concerning quality, safety, and transparency. Approximately 370 Registered Nurses (including 53 New Graduate RNs), 42 Licensed Vocational Nurses (LVNs), 36 Respiratory Therapists, 23 Radiology/MRI Technicians, and 16 Pharmacists will participate in Clinical Preceptor and Didactic training classes. MS will primarily be delivered to New Graduate RNs and those new to a specialized department or position.

#### SET Priority Industry Wage Modification

For trainees employed in a priority industry, the Panel may modify the SET wage up to 25% below the statewide average hourly wage from \$30.36 to \$22.77. This wage modification is intended to train healthcare workers in lower wage occupations to provide opportunities for wage increases and

## PROPOSED TRAINING PROJECT DETAILS

long-term job security.

### 4.1 Program Waivers

No waivers have been applied to this proposed project.

### 4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	None selected to date	N/A	N/A
Administrative	None selected to date	N/A	N/A
Training	None selected to date	N/A	N/A

### 4.3 Previous ETP Project Summary

This table summarizes Orange County Global's (Santa Ana) 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
ET15-0171	Santa Ana	7/7/14 – 7/6/16	\$475,900 (15% SC applied)*	\$335,080 (incumbent earnings \$76,685)	70%
ET12-0299	Santa Ana	2/6/12 – 2/5/14	\$325,752	\$285,666 (incumbent earnings \$145,627)	88%
<b>*Note</b>	<i>Cumulative incumbent earnings for ET12 and a prior project (within the last five years at the time) were in excess of \$250K at this facility. Therefore, a 15% Substantial Contribution was applied in the subsequent ET15 for the Santa Ana facility.</i>				

This table summarizes Anaheim Global (Anaheim), South Coast Global (Santa Ana), and Chapman Global's (Orange) performance under prior ETP contract(s) completed within the last five years.

## PROPOSED TRAINING PROJECT DETAILS

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET14-0243	Anaheim, Santa Ana, and Orange	12/16/13 – 12/15/15	\$315,540	\$224,042	71%
ET11-0170	Anaheim, Santa Ana, and Orange	2/7/11 – 2/6/13	\$249,498	\$176,794	71%

### 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.

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Computer Skills (Standard)	Computerized Radiography (CR)
	Demand Interim Claim
	Electronic Health Records Application Skills
	Epemis: Clearing House
	Learning Management System
	Microsoft Office/Excel Skills (Intermediate and
	Paragon Order Entry Skills
	Patient Billing and Accounts Receivable Tracking
	Payor Selection/Reclass/Rev/Recls Proc
	Reports (Statistical/ATB)
	UB04
	Workqueue Proc
	Continuous Improvement Skills
Charge Nurse Training/Frontline Leadership Skills	
Communications Skills	
Core Measures	
Crisis Prevention Intervention (CPI)	
Critical Thinking Skills	
Culturally Appropriate Care	
Customer Service Skills	
Documentation Skills	
Hospital Emergency Management for Patients	
Lean Six Sigma	
Organization and Time Management Skills	
Patient and Family Centered Care Skills	
Performance and Quality Improvement and Procedures Skills	
Preceptor Skills (train-the-trainer)	
Team Building Skills	
Utilization Review	
Medical Skills (didactic)	Acute Myocardial Infarction
	Acute Psychiatric Care
	Advanced Cardiac Life Support (ACLS)
	Arterial Blood Gas (ABG) Interpretation
	Basic Life Support (BLS)
	Behavioral Health Nursing Skills
	Body Mechanics
	Care of Bariatric Patient
	Care of Pediatric Patients
	Care of Spine Patient
	Care of the Cardiac Patient
	Care of the Neurosurgical Patient

## Attachment 2 - Training Delivery and Curriculum Listing

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

Care of the Stroke Patient
CCRN Prep Course
CEN Prep Course
Central Lines Management
Chest Tube Care and Management
CNOR Prep Course
Code Blue Response and Procedures
Correctional Health Safety Protocols
CPAN Prep Course
Critical Care Nursing Skills
Critical Care Training Program
Critical Results Management
CVRN Prep Course
Decontamination Procedures
Diabetes Care and Management
Diabetes Education Training
Dysrhythmia Recognition and Interpretation
Educating the Patient and Family
EKG and Cardiac Monitoring
Electronic Fetal Monitoring (Beginning and Advanced)
Emergency Care of the Burn Patient
Emergency Room Nursing Skills
Equipment Skills (IV pumps, cardiac telemetry, vital signs, pulse-oximeter, ventilators, specialty beds and mattresses, etc.)
Evidence Based Practices
Gastrointestinal Assessment and Management
Hemodynamic Monitoring
Infection Control
Intra-Aortic Balloon Pump Therapy (IABP)
Intra-Cranial Pressure Monitoring and Ventriculostomy
Intravenous (IV) Insertion and Therapy
Kinetic Therapy
Labor, Delivery, and Postpartum Nursing Skills
Management of the Renal Transplant Surgical Patient
Medical/Surgical Nursing Skills
Medication Administration and Management
Moderate Sedation
Neonatal Advanced Life Support (NALS)
Neonatal Intensive Care Unit (NICU) Nursing Skills
Neonatal Nursing Skills
Neonatal Resuscitation Provider (NRP)
Neonatal/Infant Pain Scale (NIPS)
New Graduate Nursing Skills
Nurse Orientation Training (for New Grads only)

## Attachment 2 - Training Delivery and Curriculum Listing

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

Nursing Diagnosis Skills
Nursing Process Skills
OB Skills
Oncology Nursing Skills
Orthopedic Nursing Skills
Ostomy and Continence Care
Outcome Skills
Pain Management (Acute and Chronic)
Palliative Care
Patient Assessment and Care
Patient Fall Prevention
Pediatric Advanced Life Support (PALS)
Peri-operative Nursing Skills
Photographic Archive Communications System (PACS)
PICC Line Insertion
Pre and Post Operative Care
Psychiatric Nursing Skills
Psychotropic Medications
Rapid Response Skills
Renal Assessment and Management
Respiratory Assessment and Care
Restraints
S.T.A.B.L.E.
Surgical Nursing Skills
Telemetry Nursing Skills
Total Parenteral Nutrition (TPN)
Transfer Techniques
Trauma Nursing Skills
Triage Nursing Skills
Ventilator and Tracheotomy Care
Wound and Skin Care

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Medical Skills (preceptor)	Antepartum, Labor, Delivery, and Postpartum Skills
	Bariatric Nursing skills
	Cardiac Nursing skills
	Care of Dialysis Patient
	Care of the Cardiac Patient
	Care of Trauma Patient
	Care of Ventilator Patient
	Critical Care Nursing Skills
	Dysrhythmia Interpretation
	EKG and Cardiac Monitoring

## Attachment 2 - Training Delivery and Curriculum Listing

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

Electronic Fetal Monitoring
Geriatric Nursing Skills
Hemodynamic Monitoring
Hospice Nursing Skills
Intra-Aortic Balloon Pump (IABP) Therapy
Intracranial Pressure Monitoring and Ventriculos
Intravenous (IV) Therapy
Management of the Renal Transplant Surgical Patient
Med/Surg Nursing Skills
Medical/Surgical Nursing Skills
Neonatal Advanced Life Support
Neonatal Intensive Care Unit (NICU) Nursing Skills
Neonatal Nursing Skills
Neonatal Resuscitation Provider (NRP)
Neonatal/Infant Pain Scale (NIPS)
Oncology Nursing Skills
Orthopedic Nursing Skills
Palliative Care
Patient Assessment and Care
Peri-operative Nursing Skills
Post-Neurological Injury Nursing Skills
Post-Orthopedic Surgery Nursing Skills
Post-Trauma Injury Nursing Skills
Pre & Post Procedure care of Cardiac Patient
Pre and Post Operative Care
S.T.A.B.L.E.
Spine Nursing skills
Telemetry Nursing Skills
Total Parenteral Nutrition – Med Surg
Tube Feeding
Use of Lift Devices
Ventilator and Tracheotomy Care
Wrong Site Surgery Prevention

**PL Justification and Details**

Explain the need for productive laboratory (PL) training	Productive Laboratory (PL) is essential for high quality outcomes in our field of healthcare. Hands-on learning and training from experts in the field are a must when it comes to the care of actual patients. Only through PL, can employees be trained in the same setting and utilize the same tools in order to be successful on their own. PL also allows trainees to work side by side their trainer and be given direct and automatic feedback on the spot. These types of trainings supplement the classroom
Describe the Equipment/Processes to be used in delivering the PL training	Some equipment that may be used include ventilators, lifts, pumps, monitors, restraints, EKG machines, etc.
Describe Trainer Qualifications	Trainers are experts and licensed in their respective fields with leadership/mentorship roles and responsibilities.

<b>Trainer to Trainee Ratios</b> - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	<b>Trainer</b>	<b>Trainee</b>
Ratio for One Class, or Minimum When More than One Class	1	1

## Attachment 2 - Training Delivery and Curriculum Listing

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

Ratio for Maximum Ratio When More than One Class	1	3
PLT Approval	Yes	





*A Voice for Nurses. A Vision for Healthcare.*



**OAKLAND**

2000 Franklin Street  
Oakland CA 94612

*phone:* 510-273-2200

*fax:* 510-663-2771

**LOS ANGELES**

225 West Broadway  
Suite 500

Glendale CA 91204

*phone:* 818-240-1900

*fax:* 818-240-8336

July 25, 2017

Employment Training Panel  
1100 J St.  
Fourth Floor  
Sacramento, CA 95814

To Whom It May Concern:

This letter is to confirm the support of the California Nurses Association/National Nurses United for KPC Health grant proposal as submitted to the Employment Training Fund.

Sincerely,

A handwritten signature in blue ink that reads "Janet Jones".

Janet Jones  
Labor Representative  
California Nurses Association



5480 Ferguson Drive  
Los Angeles, Ca. 90022

Phone: (323)-236-0534  
Fax: (323)-721-3538

**RETURN RECEIPT REQUESTED  
U.S. CERTIFIED MAIL**

July 26, 2017

Employment Training Panel  
1100 J Street – 4<sup>th</sup> Floor  
Sacramento, California 95814

Sir/Madam:

I'm writing on behalf of SEIU United Healthcare Workers-West. Our Union represents the service, business clerical and technical bargaining unit employees in Chapman Global Medical Center, South Coast Global Medical Center and Anaheim Global Medical Center. We support the application for training funding being submitted to the Employment Training Panel by and on behalf of these hospitals. We fully expect the employer to use the funds on relevant trainings that will assist our members in upgrading their skills which are critical to maintaining quality patient care.

Please contact me if you any further questions.

Respectfully,

A handwritten signature in black ink that reads "Ferdinand Silerio".

Ferdinand Silerio  
Coordinator II  
Hospital Division

Cell: (213) 716-6734

Fax: (323) 721-3538

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Cc: Carlos Magdaleno, Union Representative  
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## RETRAINEE - JOB CREATION

### Training Proposal for: Reborn Cabinets

**Agreement Number: ET18-0184**

**Panel Meeting of:** March 23, 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:	Alameda, Los Angeles, Orange and 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: 312	U.S.: 334	Worldwide: 334
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	9%		

### FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$547,560</td></tr> </table>	Program Costs	\$547,560	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(Substantial Contribution)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(Substantial Contribution)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(High Earner Reduction)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(High Earner Reduction)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;"><b>Total ETP Funding</b></td></tr> <tr><td style="text-align: center;">\$547,560</td></tr> </table>	<b>Total ETP Funding</b>	\$547,560
Program Costs														
\$547,560														
(Substantial Contribution)														
\$0														
(High Earner Reduction)														
\$0														
<b>Total ETP Funding</b>														
\$547,560														

In-Kind Contribution:	100% of Total ETP Funding Required	\$812,858
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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 Impr., Mfg. Skills, Mgmt. Skills, Literacy Skills	306	8-200	0-100	\$1,260	\$17.03
				Weighted Avg: 70			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Impr., Mfg. Skills, Mgmt. Skills, Literacy Skills	90	8-200	0-100	\$1,800	*\$14.19
				Weighted Avg: 90			

\*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: Alameda-\$18.22/hr., Los Angeles- \$17.54/hr., Orange-\$17.50/hr., San Diego-\$17.03/hr. Job Number 2: Alameda-\$15.18/hr., Los Angeles-\$14.62/hr., Orange-\$14.58/hr., San Diego-\$14.19/hr.

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
Up to \$2.50 per hour for Job Number 1 and Job Number 2 may be used to meet the Post-Retention Wage.

**\*\*Commission Income:** Sales Staff earn at least the state minimum wage (\$11.00/hr. in Orange County), plus commission when newly hired. Once established, pay is based on straight commission, with employees typically earning \$25 to \$50 per hour in commissions.

<b>Wage Range by Occupation</b>		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Engineering Staff		8
Human Resources Staff		4
Installation Staff		54
Manager		34
Manufacturing Staff		52
Marketing Staff		44
Project Manager		20
Sales Staff		90
<b>Job Number 2 – Job Creation</b>		
Installation Staff		46
Manufacturing Staff		22
Sales Staff		22

## **INTRODUCTION**

Founded in 1983, Reborn Cabinets (Reborn) is a family-owned business that designs, manufactures, and installs custom cabinetry in kitchens and baths for homeowners. The Company's headquarters is located in Anaheim which includes a showroom and their manufacturing operation. Reborn builds all of the cabinetry in its Anaheim facility where they also utilize specialized equipment to create and apply a catalyzed conversion varnish finish that improves the quality of their products. The Company has four standalone showrooms in Pleasanton, Torrance, Lake Forest, and San Diego. In addition, Reborn is an approved sell, furnish and install vendor for the Home Depot at numerous stores throughout California and the exclusive distributor of Kohler Brand and Jacuzzi Brand Walk-In Tubs for the entire state of California and Nevada.

Training will be for the employees at the Anaheim headquarters and the Pleasanton, Torrance, Lake Forest and San Diego showrooms. Reborn qualifies for standard retraining as a priority industry manufacturer.

## **PROJECT DETAILS**

This is Reborn's second ETP agreement, its second in the last five years. In their last agreement Reborn delivered over 13,000 reimbursable training hours and are on pace to receive 100% reimbursement from their contract. Subsequent to the approval of the last agreement, in 2017 Reborn's sales grew 40%, the largest increase in company history. In order for Reborn to continue their growth trajectory and meet the expectations of customers and strategic partners they require training. In order to meet the Company's revenue growth projections for 2018 they must be able to increase manufacturing and installation productivity. Reborn is committed to grow both the size and skill level of its Manufacturing and Installation Staff. However, this has been a challenge because the industry and vocational schools do not produce the candidates needed to fill these positions at Reborn. Thus, Reborn has dedicated resources to develop a training curriculum for

new Installation Staff that includes a minimum 3 week (120 hour) initial training program delivered in house. In addition, Manufacturing Staff will receive training to develop technical skills with a focus on Good Manufacturing Practices & Inspections, Production and Inventory Management and CNC Training/Certification.

Likewise, for Reborn to increase their market share and meet their revenue growth projections they must increase sales. To do this, Reborn has expanded and formalized its Sales Staff training. Continued focus in formalized sales training was a key factor in revenue growth in 2017 and helped the sales team understand the intricacies of new product offerings and design requirements. Thus, Reborn has dedicated resources to training new Sales Staff thru a minimum 2 week (80 hour) initial training program that is performed in house. The Company will also deliver additional Business and Computer Skills training for experienced Sales Staff (20 hours).

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.

### **Repeat Contractor**

Reborn established its "Reborn University" prior to the last agreement, and they have significantly expanded the scope of training courses available to staff for this project. To build upon the success of Reborn University, the Company invested in a new learning management system (LMS) to create individualized training plans, schedule training, track progress, and use measureable elements to determine professional development opportunities for each employee. In addition, Reborn has invested in a new and updated ERP/CRM platform (Buildertrend Software) that will be implemented in 2018 with an overall goal to increase production. The new ERP/CRM platform will be used to meet the growing demand of customers. All staff require training on the new system and how it can increase overall efficiency.

### **Retrainee - Job Creation**

Reborn will expand business capacity by hiring 90 new employees (Job Number 2). The Company is growing at a rate of 40% annually. In its most recent agreement Reborn hired and trained a higher number of employees than planned. Reborn must increase their employee base in key occupations to keep pace with customer demand. New, inexperienced Installation and Manufacturing Staff will be trained on the Company's processes in a simulated lab setting. The Company will also be hiring Sales Staff to increase revenue and market share. The date-of-hire will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

### **Temporary to Permanent Hiring**

Reborn intends to train and retain the above 90 recently hired workers (Job Number 2) under Panel guidelines for the Temporary-to-Permanent program. The Company will retain these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to Reborn the average time for "converting" temporary workers into full-time permanent employment is 5 months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

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

## Training Plan

**Business Skills:** Sales, Marketing, and Human Resources Staff, Project Managers and Managers will participate in training to provide workers the skills to better manage customer relationships, complex projects, and marketing campaigns; meet sales goals; and ensure effective communication with internal and external customers.

**Commercial Skills:** Engineering Staff, Installation Staff, and Project Managers will be provided with training to ensure they have the technical skills to provide quality installation solutions for customers.

**Computer Skills:** Employees in all occupations will have the opportunity to receive Computer Skills training. Managers, Sales and Project Management staff will be the primary focus for Flux, Resi Job Tracking Database and Buildertrend software training to effectively cost and manage projects. Microsoft Office training will be offered for job function efficiency.

**Continuous Improvement:** Employees in all occupations, with a focus on Manufacturing and Project Management staff, will be provided training to sustain and enhance growth. Training in Lean Manufacturing, Teams, Improving Process Cycle Times and Leading Change will help current and new employees establish a continuous improvement mentality and focus on working effectively within teams. Project Managers will benefit from Time Management and Performance Management training to maximize efficiency and manage multiple priorities.

**Management Skills:** Managers will be provided with targeted training that will permit better management of their teams and develop the next level of leadership so that the organization can continue its growth trajectory.

**Manufacturing Skills:** Managers, Project Managers, and Engineering and Manufacturing Staff will receive training to better manage increased production demands that come with growth. Production Skills, Quality Systems Requirements, Production and Inventory Management and Writing Standard Operating Procedures will reduce production and inventory issues and ensure greater efficiency between departments. CNC and Forklift certification will provide workers with the skills to effectively and safely perform these operations.

**Literacy Skills:** Select Installation & Manufacturing Staff whose limited language skills have been deemed a barrier to further their skills will have the opportunity to participate in Vocational English as a Second Language.

## CBT

Reborn launched a new LMS as part of their Reborn University. The LMS includes hundreds of training topics that fall within the proposed curriculum. CBT training will be used to supplement Reborn's Classroom/Lab training and will be used as follow up training that will be assigned to trainees to complete at their own pace during their work day. This additional training will ensure trainees are increasing the retention of information from their Classroom/Lab training. The LMS allows the Company to track trainees and their completion of the course. The LMS system will only be used to assist with delivery of CBT. Paper-based documentation will be used for Classroom/lab.

## **Training Infrastructure**

Reborn's Training Department consists of five full-time Reborn staff (Training Manager and four Training Administrators) that will lead the majority of training delivered during the project. In addition, the company will leverage In-house technical experts who split their time between training and fulfilling their daily job functions to deliver specific training sessions. Reborn has partnered with California Manufacturing Technology Consulting (CMTC) to support its administrative efforts. The Company's Training Department will work with the CMTC team to coordinate all training efforts, including scheduling training, securing rosters, providing trainee enrollment data, verifying training and retention completion, participating in ETP monitoring activities and ensuring compliance with all ETP requirements.

## **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. In 2017, Reborn invested \$500,000 in training. The Company utilizes their Reborn University to provide extensive training opportunities through offerings delivered in a variety of settings. They have a dedicated area on the manufacturing floor that permits Manufacturing and Installation Staff to gain hands-on knowledge in a simulated work environment. They will also utilize a dedicated training classroom, and have expanded their CBT opportunities in their LMS.

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **ACTIVE PROJECTS**

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

<b>Agreement No.</b>	<b>Approved Amount</b>	<b>Term</b>	<b>No. Trainees (Estimated)</b>	<b>No. Completed Training</b>	<b>No. Retained</b>
ET17-0147	\$266,040	08/01/16 – 07/31/18	194	251	44

Based on ETP Systems, Reborn's reimbursable hours have been tracked for potential earnings of \$248,671 (93% of approved amount). The Contractor projects final earnings of 100% based on training currently in progress through April, 30 2018, the final day of training.

## **DEVELOPMENT SERVICES**

CMTC assisted with development of this proposal. For a fee of \$15,000.

## **ADMINISTRATIVE SERVICES**

Reborn retained CMTC to perform administrative services for a fee not to exceed 13% of payment earned.

## **TRAINING VENDORS**

To Be Determined



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

08-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Advanced Sales Skills
- Advanced Strategies for Social Media
- Budgeting
- Coaching & Mentoring
- Data Analysis
- Data Presentation
- Effective Business Writing
- Financial Reporting
- How to Conduct an Effective Meeting
- How to Create a Professional & Effective Email
- How to Deal with Difficult Customers
- How to Measure & Draw Kitchen Projects
- How to Measure a Bathroom Project
- Maximizing Employee Performance
- Negotiation & Overcoming Objections
- Sales Skills
- Sales Skills for Customer Service Reps
- Script Training
- Ultimate Customer Experience
- Ultimate Customer Experience-Customer Service Skills
- Ultimate Customer Experience-Ensuring Customer Expectations

**COMMERCIAL SKILLS**

- Signature Refacing Installation Training
- Bath Solution Installation Training

**COMPUTER SKILLS**

- Buildertrend Software
- Microsoft Office (Intermediate & Advanced)
- Financial Management Software (Fluix)
- Lead Perfection Training
- Resi Job Tracking Database
- Call Center Software (Five9)

**CONTINUOUS IMPROVEMENT**

- Accountability in the Workplace
- Creating Successful Habits
- Critical Thinking/Strategic Thinking
- Effective Delegation Strategies
- Employee Engagement
- From Good to Great, How Mindset & Attitude Affects Your Work
- Goal Setting in the Workplace
- Handling Conflict
- Harnessing & Developing Potential
- High Performance Leadership Skills
- How to Assign & Manage Projects
- How to Build a Winning Team

- Improving Process Cycle Times
- Integrity & Ethics
- Leadership
- Leading Change
- Leading Effective Meetings for Problem Solving
- Lean Manufacturing
- Learning Styles, Learning Curves
- Managing Change
- Motivating Your Team
- Problem Solving Skills
- Quality System Requirements
- Self Coaching Strategies
- Team Building
- Time Management Skills

### **MANAGEMENT SKILLS (management trainees only)**

- Management/Supervisory Skills
- Leadership Development & Succession Planning
- Coaching for Supervisors & Managers
- Succeeding as a New Manager
- Transitioning from Peer to Manager

### **MANUFACTURING SKILLS**

- Productions Skills
  - Proper Setup and Use the CNC
  - Proper Set-Up and Use for Table Saws
  - Proper Set-Up and Use of the Finish Sander
  - Proper Set-Up and Use of the Automated Finish Line
  - Proper Set-Up and Use of a Hand Router
  - Proper Set-Up and Use of the Pin Router
  - Proper Set-Up and Use of the Blum boring machine
  - Proper Set-Up and Use of Pneumatic Hand Sanders
- Good Manufacturing Practices & Inspections
- Production and Inventory Management
- Forklift Training/certification
- CNC Training/certification
- Writing Standard Operating Procedures
- Safety

### **LITERACY SKILLS**

- Vocational English as a Second Language (VESL)

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

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

**CBT Hours**

0-100

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Negotiation: Road to Success – 1 hour
- Power Speaking – 1 hour
- Sell for Success – 1 hour

**COMPUTER SKILLS**

- Cyber Security Basics – 1 hour

**CONTINUOUS IMPROVEMENT**

- Are You Really Listening – 1 hour
- Avoiding Conflicts of Interest – 1 hour
- Effective Business Writing – 1 hour
- Ethics & Code of Conduct – 1 hour
- Interpersonal Communication – 1 hour
- Managing Information Overload – 1 hour
- Managing Conflict: A Collaborative Approach – 1 hour
- Resolving Ethical Issues – 1 hour
- Social Media Ethics – 1 hour

**MANAGEMENT SKILLS (management trainees only)**

- Management Basics – 1 hour

**MANUFACTURING SKILLS**

- Ergonomics for Manufacturing – 1 hour
- Head and Eye Protection – 1 hour
- Respiratory Protection – 1 hour
- Slip, Trip and Fall Protection – 1 hour

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



**TRAINING PROPOSAL FOR  
Cintas Corporation No. 3  
18-0563**

**Panel Meeting Date:** 03/23/2018  
**Regional Office:** San Francisco Bay Area Regional Office  
**Analyst Name:** Lily Lai  
**Type of Proposal:** Single Employer  
**Funding Source:** SET

**FUNDING OVERVIEW**

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

<b>TOTAL ETP FUNDING:</b>		<b>\$ 301,185.00</b>	
<b>Program &amp; Admin Cost</b>	<b>Support Cost (\$)</b>	<b>Substantial Contribution (\$)</b>	<b>Total In-Kind</b>
\$ 301,185.00	N/A	\$ 0.00	\$ 850,000.00

**APPLICANT PROFILE**

<b>Company Summary</b>	Founded in 1929, and headquartered in Cincinnati, OH, Cintas Corporation No. 3 (Cintas) ( <a href="http://www.cintas.com">www.cintas.com</a> ) provides corporate branded uniforms and products such as entrance mats, cleaning supplies, promotional products, safety supplies, and cleaning services to a wide variety of industries such as food service, automotive, air transport, hospitality, health care, manufacturing and education.
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<b>Industry Sector(s)</b>	Services (Other)
<b>Priority Industry</b>	No
<b>No. Employees (Applicant)</b>	<b>State:</b> 3208 <b>US:</b> 38134 <b>World Wide:</b> 41342
<b>Turnover Rate (Applicant)</b>	12.60 %
<b>Repeat Contractor</b>	No

<b>High Unemployment Area</b>	Yes
<b>Union(s)</b>	N/A

**TRAINING PROFILE**

<b>Training Objective(s)</b>	To stay ahead in a competitive market, Cintas is implementing SAP, a comprehensive enterprise resource planning and business suite platform, which will significantly improve customer service levels and integrate "Rental Connect" with business operations and 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	207	\$ 15.00	97	\$ 1455	8 - 200

# PROPOSED TRAINING PROJECT DETAILS

## 1. Company Background

Cintas Corporation helps more than one million businesses of all types and sizes conduct business with confidence, by providing a wide range of products and services to enhance image and keep facilities and employees clean, safe and looking their best.

Cintas' core products and services include: Uniforms and Apparel - uniform and apparel rentals and laundering services; Facility Services - cleaning supplies, tools and services; Flame Resistant Clothing - rentals and sales of specialized fire and chemical resistant clothing and products; Promotional Products - promotion products to assist businesses stand out and increase brand awareness; First Aid & Safety Products - first aid and safety supply products and kits, as well as safety compliance training solutions; Fire Protection Products - services and products such as fire extinguisher inspection, fire sprinkler systems, fire alarm panels and monitoring, hazard suppression and emergency and exit light. This will be the Company's first ETP contract.

The following ten locations will participate: Concord, Pittsburg, Fresno, Bakersfield, Pico Rivera, Compton, Sacramento (2), Stockton, and Gilroy.

## 2. Current Training Project Details

<b>Purpose of Training</b>	<p>For the past twenty-five years, Cintas has been operating with an antiquated service management system. To stay ahead in a competitive market, Cintas is implementing SAP, a comprehensive enterprise resource planning and business suite platform, which will significantly improve customer service levels and integrate business operations. The new system and business processes (known as "Rental Connect") is scheduled to be implemented in California in early 2018 and will require a complete re-training of nearly all California employees. Training will include technology (including new handheld devices) and customer service skills.</p> <p>Additionally, Cintas recently acquired G&amp;K Services ("G&amp;K"), a branded uniform and facility services program provider. This acquisition allows Cintas to expand customer profile and improve route density, better positioning Cintas to grow in targeted industries. Training is needed to integrate G&amp;K employees into Cintas' operations and processes.</p>
<b>Training Infrastructure and Administrative Plan</b>	<p>Cintas has a significant learning and development team of approximately 65 professionals that assist in training scheduling and coordination nation-wide. This team consists of 3 training directors, one of which will be dedicated to scheduling, enrolling, and tracking training hours. Cintas will also have staff on-site at each California training location to assist with administration. Additionally, Cintas has the support of various departments, including Learning and Development, Human Resources and Tax, who will serve as stakeholders and provide further oversight and coordination of the contract. The Company also retained a third-</p>

## PROPOSED TRAINING PROJECT DETAILS

	<p>party subcontractor, Deloitte Tax, to assist with administration.</p> <p>The Company has provided a sample rollout training plan to staff, detailing a daily training schedule per occupation per location. Similar training plans will be created for each CA location participating under this proposal.</p> <p>Training will be conducted by in-house subject matter experts. External training vendors may be used if necessary.</p>
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A
<b>Substantial Contribution Description</b>	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
<b>Summary</b>	
All occupations (Attachment 1) will receive training in Business, Computer, and Commercial Skills as identified (Attachment 2).	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
<b>Summary</b>	
All occupations (Attachment 1) will receive training in Business, Computer, and Commercial Skills as identified (Attachment 2).	

Delivery Method/Level	Productive Laboratory
<b>Summary</b>	
All occupations (Attachment 1) will receive training in Computer Skills as identified (Attachment 2).	

### 4. Additional Company or Training Project Details

#### Productive Lab Training

In addition to class/lab training, trainees will need to up to 40 hours of Productive Lab (PL) training to ensure they are proficient with new software, business processes and technology devices. All employees dealing with customers will receive this training in order to place, manage, and complete orders.

## PROPOSED TRAINING PROJECT DETAILS

### 4.1 Program Waivers

N/A

### 4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Deloitte Tax LLP	San Francisco	\$ 25,000.00
Administrative	Deloitte Tax LLP	San Francisco	Not to exceed 13.00% 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 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.

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Accounts Payable Checklist
	Accounts Receivable Checklist
	Audit
	Basical Agreement Knowledge
	Book Pricing
	Buyout/Buyback Invoices
	Commission Structure, Goals and Reports
	Credits and Debits
	Customer Accounts Receivable History
	Customer Invoicing
	Customer Request Process
	Deposit Verification
	Differences between GK (the acquired company) and Cintas Billing
	Jeopardy Customer Request Forms
	Maintenance Checklist
	Material Cost
	Multi Location Accounts (MLA)
	Multi-Location Agreements
	New Business Automation and New Account Process
	Non-Sufficient Funds Log
	Office 20 Keys
	Review National Accounts
	Route Check-In Procedures
	SAP Role Mapping
	Scrap Sales
	Segregation of Duties
	Service Sales Rep. Website
	Viewing a Sales Agreement
Commercial Skills (Standard)	20 Key of Garment Material Cost
	Calculating Material Cost
	Customer Request Process
	Emblem Ordering
	Emblem Removal
	Garment Grading
	In-Plant Replacement
	Logo Mat Purchasing Process
	Navigate to Item Conversion Resource
	New Garment Receiving
	Out of Service Schedule

## Attachment 2 - Training Delivery and Curriculum Listing

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

	Product Knowledge
	Product Knowledge Training
	Purchasing Facility Service products from Dallas
	R-5301 Weekly Operations Report Information
	Reading a Garment Request Form
	Reading Identification Tapes
	Reading Trim
	Replacing Logo Mat Process
	Service Leadership
	Stockroom Organization
	Stockroom Process Flow
	Transition of Trust (New Accounts)
	Understand Direct Embroidery Conversion
	Understanding Facility Service Product Conversion
	Understanding Reason Codes
Computer Skills (Standard)	Accounts Payable
	Accounts Receivable
	Accounts Receivable Adjustments
	Accounts Receivable Incoming Payments & Adjust.
	Accounts Receivable Supervisor/Manager
	Agreement Information in Customer Interaction Center
	Agreements
	Approving a Credit or Debit
	Autosort Extract
	Billing Transactions
	Blocked Invoices for General Manager
	Buyout/Buyback/Breach/Scrap Sales
	Cash Applications - supports accounts receivable
	Change Request Form Life Cycle
	Check-In
	Connect Rental Systems Overview
	Contacts and Emailing Service Orders
	Contract Renewals
	Creating a Credit, Debit, or Buyout
	Creating a Return
	Creating and Maintaining Contacts
	Creating and Maintaining Service Orders
	Credits/Debits
	Customer Allocation, Point of Sale and Shoemobile
	Customer and Route Management
	Customer Contacts in Customer Interaction Center

## Attachment 2 - Training Delivery and Curriculum Listing

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

Customer Interaction Center (CIC)
Customer Relationship Management (CRM)
Customer Relationship Manager Keying Service Level Data
Deep Clean
Direct Sale
Direct Sales
Direct Sales and Shoemobile
Entering Vendor Invoices
Garment Grading and Picking
Garment Purchasing
Garment Purchasing - Existing Accounts
Garment Purchasing - New Accounts
Incoming Payments
Inventory and Accounts
Inventory Lookup With Known Plant
Inventory Lookup Without Known Plant
Invoice Administration
Keying New Contracts
Location Dashboard
Maintenance Actions
Maintenance and Service Order Transactions
Maintenance for New Account Coordinator
Maintenance for Office Partners
Manage Collection Worklist
Master Data Specialist (MDS)
Master Data Specialist Sales and Service
Master Data Specialist Sales Representative
Material Data Management
Month End reporting processes
Multi Location Accounts and Group Purchasing Organizations
myCintas Online Bill Pay
National Account Consolidated Billing
Non-Garment Purchasing
Office Portable Route Computer Payments
Partner Workbench
Physical Inventory
Picking and Grading
Portable Route Computer
Portable Route Computer Scenarios
Receive In-Service Garments
Receiving

## Attachment 2 - Training Delivery and Curriculum Listing

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

Repairs
Reporting
Reporting 201
Reports and Bonuses
Requesting a New Garment, Non Garment or Emblem
Returns
Sales Commission
Sales Commission Partner Workbench
Sales Orders
Scan In
Scan Out
Searching and Viewing Accounts
Searching in Customer Interaction Center
Service Orders
Service Sales Reps Commissions
Shoemobile
Stock Transfer Orders
Stockroom Functions
Stockroom Inventory
Trumping Rules and Pricing
USPS United States Postal Service
USPS United States Postal Service for Office
USPS United States Postal Service for Service
Viewing Commission Reports
Visitrak
Weekly Operating Report (WOR)

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	Agreement Information in Customer Interaction Center	0.50
	Billing Transactions	0.50
	Business Warehouse Overview (platform in SAP)	0.50
	Buyout/Buyback/Breach/Scrap Sales	0.50
	Cash Apps Overview	0.50
	Change Request Form Life Cycle	0.50
	Garment Purchasing	0.50
	Non-Garment Purchasing	0.50
	Returns	0.50
	Searching and Viewing Accounts	0.50
	Subcontracting	0.50
	Visitrak	0.50

## 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>Productive Laboratory</i>	
Training Type (Level)	Planned Course Offerings	
Computer Skills (Standard)	SAP On-the-job training	
<b><i>PL Justification and Details</i></b>		
Explain the need for productive laboratory (PL) training	Once employees have completed all classroom training related to the Rental Connect project, they will need to undergo approximately 40 hours of on-the-job training to ensure that they are proficient with new software, business processes and technology devices. All production occupations will receive this training, including account coordinators, production managers, route check-in associates, sales representatives, drivers and customer service reps.	
Describe the Equipment/Processes to be used in delivering the PL training	Employees that interact with customers will be required to use hand-held customer service devices to place, manage, and complete orders. These devices are a new technology for Cintas and will require extensive training to be used effectively.	
Describe Trainer Qualifications	All trainers will be experienced managers who have been through the Rental Connect project training and are considered "super users". The trainers will have extensive knowledge of the technology and will use their experience to share their extensive support and knowledge to the production staff.	
<b>Trainer to Trainee Ratios</b> - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	<b>Trainer</b>	<b>Trainee</b>
Ratio for One Class, or Minimum When More than One Class	1	1
Ratio for Maximum Ratio When More than One Class	1	1
PLT Approval	Yes	



## RETRAINEE - JOB CREATION

### Training Proposal for:

## Del Monaco Foods, LLC dba Kettle Cuisine

Agreement Number: ET18-0198

Panel Meeting of: March 23, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: L. Lai

### PROJECT PROFILE

Contract Attributes:	Critical Proposal Job Creation Initiative Priority Rate Retrainee	Industry Sector(s):	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Santa Clara	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 120	U.S.: 500	Worldwide: 500
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

### FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$384,000		\$0	\$0		\$384,000

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 Critical Proposal Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills	80	8-200	-0-	\$1,800	\$18.22
				Weighted Avg: 100			
2	Job Creation Critical Proposal Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills	80	8-200	-0-	\$3,000	\$15.18
				Weighted Avg: 150			

**Minimum Wage by County:** Job Number 1: \$18.22 per hour in Santa Clara County  
 Job Number 2 (Job Creation): \$15.18 per hour in Santa Clara County

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$2.50 per hour may be used to meet the Post-Retention Wage in Job Number 1; and up to \$1.72 per hour in Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff		5
Cooking Staff		37
Maintenance Staff		5
Manager		5
Production Staff		20
Sanitation Staff		8
<b>Job Number 2 – Job Creation</b>		
Administrative Staff		5
Cooking Staff		37
Maintenance Staff		5
Manager		5
Production Staff		20
Sanitation Staff		8

## **Critical Proposal**

Del Monaco Foods, LLC dba Kettle Cuisine (Kettle Cuisine) is designated a “Critical Proposal”, as defined in Title 22, California Code of Regulations (CCR) 4402.2, by the Governor’s Office of Business and Economic Development (Go-BIZ). Kettle Cuisine is expanding its Morgan Hill facility and workforce due to a significant increase in production. This project will assist Kettle Cuisine to develop new job skills for newly hired and incumbent workers.

## **INTRODUCTION**

Kettle Cuisine, founded in Massachusetts in 1986, expanded to California in 2016 by buying the Del Monaco Foods plant in Morgan Hill. The company makes soups in small batches from natural foods, packages it in others’ brands and ships it refrigerated or frozen. Kettle Cuisine currently supplies retailers such as Whole Foods, Trader Joe’s and Erik’s Delis with its soups, and foodservice companies that sell to restaurants, institutions and retailers.

The Morgan Hill plant supplies refrigerated and frozen soups to most of the Western states with some deliveries now to the Midwest and Southeast. The company buys its all-natural ingredients from regional suppliers such as organic milk from Petaluma Creamery in Petaluma, and fresh vegetables from Tanimura & Antle farms in Salinas.

## **PROJECT DETAILS**

Training is driven by a major company expansion to satisfy consumer demand for “real” foods made out of healthy ingredients that are convenient and taste good. The Company has grown by 30% in the past year as consumers look for healthier foods. It expects to double its present size in the next 18 months as the trend continues and canned soups sales decline in the United States and Canada.

As Kettle Cuisine grows, operational processes must be streamlined and standardized to increase efficiencies and eliminate waste. Additionally, cross-training is needed to create a flexible workforce.

### **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.

Kettle Cuisine has committed to hiring 80 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 has started a \$26 million expansion of the Morgan Hill plant and plans to hire 80 new, fulltime workers. The new jobs are to be created this March to June, with much of the necessary skills training completed by September when the expanded plant expects to be go into full production.

### **Training Plan**

Training will be delivered via class/lab and E-learning by in-house experts and vendors as needed in the following:



**Business Skills:** Training will be offered to Administrative Staff and Managers in Accounting, Business Planning, Inventory and Supplier Management. Training will provide workers the necessary skillset to administer the larger enterprise.

**Computer Skills:** Training will be offered to all occupations and focus on various application software to manage inventory and production.

**Manufacturing Skills:** Training will be offered to Cooking, Maintenance, Production and Sanitation Staff. Topics include food preparation, kettle cooking, recipe development, maintenance and troubleshooting, sanitation systems and processes. Training will focus on improving formalize systems and processes

**Continuous Improvement:** Training will be offered to all occupations in various process improvement tools, failure analysis techniques and teamwork. Training will ensure that all products sold to customers are of the highest standards and quality.

### **Commitment to Training**

The Company's current training budget is \$200,000 and for orientation, on-the-job training, safety, harassment prevention and other compliance 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 Plant Manager will have overall management responsibility of the contract. The Human Resource Manager and Training Coordinator will schedule and coordinate day-to-day training and collect training documentation. Steve Duscha Advisories has been retained for project administration services.

Soup is a seasonal business, and the Company plans to hire and train newest employees in April, May and June, as the slow season starts, with training completed when the "soup season" begins in September. The five-month period from April to September will be an intense training period. Existing workers will also be trained during this period as they shift jobs to accommodate new hires and all employees learn new skills needed to make the expanded production facility a success.

### **Impact/Outcome**

Training will help the Company maintain its Level 3 Safe Quality Foods certification required by customers.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of \$15,000.

### **ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

To Be Determined

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

8 - 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Accounting
- Business planning
- Inventory management
- Mapping processes
- Reporting
- Supplier management

**COMPUTER SKILLS**

- Applications software
- IT infrastructure management
- Using data to manage inventory and production

**CONTINUOUS IMPROVEMENT**

- 5 S system
- Coaching and developing team members
- Data analysis and management
- Failure analysis and corrective action
- Improvement tools
- Leading teams
- Self-sufficient work teams
- Using data to improve performance

**MANUFACTURING SKILLS**

- Auditing food safety
- Creating and maintaining safe working conditions
- Documentation
- Following Hazard Analysis Critical Control Plans
- Food preparation
- Food safety
- Forklift skills
- Good manufacturing practices
- Handling fresh products
- Inspecting for quality
- Kettle cooking
- Maintenance and troubleshooting
- Managing inventory
- Meeting specifications
- Operating equipment
- Packing operations
- Recipe development
- Safety validation studies
- Sanitation systems and processes
- Standard operating procedures
- Traceability

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:**  
**Headway Technologies, Inc.**  
**Agreement Number: ET18-0178**

**Panel Meeting of:** March 23, 2018

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

**Analyst:** R. Jackson

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Manufacturing Technology/IT  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Santa Clara	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 686	U.S.:686	Worldwide: 687
<u>Turnover Rate:</u>	15%	NA	
<u>Managers/Supervisors:</u> (% of total trainees)	14%	NA	

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$403,200		\$58,320 (30% Job No. 2)	\$0		\$344,880

<b>In-Kind Contribution:</b>	<b>100% of Total ETP Funding Required</b>	<b>\$456,109</b>
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Manufacturing Computer Skills Continuous Improvement Business Skills PL-Mfg. Skills	110	8-200	0	\$1,080	\$18.22
				Weighted Avg: 60			
2	Retrainee Priority Rate	Manufacturing Computer Skills Continuous Improvement Business Skills PL-Mfg. Skills	216	8-200	0	*\$630	\$18.22
				Weighted Avg: 50			
3	Retrainee-Job Creation	Manufacturing Computer Skills Continuous Improvement Business Skills PL-Mfg. Skills	75	8-200	0	\$1,200	**\$15.18
				Weighted Avg: 60			

\*Reflects Substantial Contribution.

\*\*It will be made a condition of contract that the trainees in Job Number 3 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:** Jobs 1 & 2: \$18.22 for Santa Clara County.  
 Job 3: \$15.18 for Santa Clara County.  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Jobs 1 & 2.  
 Up to \$1.68 per hour may be used to meet the Post-Retention Wage for Job 3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff		10
Technical Staff		5
Technician		5
Engineer		65
Supervisor		15
Manager		10
<b>Job Number 2 (Substantial Contribution Site)</b>		

Administrative Staff		5
Technician		30
Technical Staff		5
Engineer		15
Supervisor		6
Manager		5
Production Staff		150
<b>Job Number 3 (Job Creation)</b>		
Administrative Staff		3
Production Staff		45
Technicians		10
Technical Staff		2
Supervisor		10
Manager		2
Engineer		3

## **INTRODUCTION**

Founded in 1994 and based in Milpitas, Headway Technologies, Inc. (Headway) ([www.headway.com](http://www.headway.com)) designs and manufactures recording heads for high performance hard disk drives used in portable computers and computer servers. Headway continues to research and develop the next generation of disk drives to maintain large customer accounts with Toshiba, Seagate and HGST.

The Company has four locations in Milpitas where the proposed class/lab and productive lab training will take place for both incumbent workers and newly hired staff. The training targets 326 current employees and 75 Job Creation retrainees. Headway is a Manufacturer eligible for the priority reimbursement rate.

## **PROJECT DETAILS**

This is Headway's fifth ETP project, forth in the past five years. In Headway's last Agreement, training focused on increasing production time and increased efficiency, which has helped the Company remain competitive. Emerging technology continues to necessitate constant training and a high level of investment in new tools. ETP funding will help meet new company goals such as upgrading skills of staff.

With ETP funds for supplemental training Headway aims to:

- Internally certify production employees on new tools and equipment
- Lower costs by reducing waste by 3.5% within 2 years
- Improve engineer assessment and estimations skills
- Achieve an 11% product yield goal to improve overall production as a result of engineering improvements within 2 years
- Demonstrate increased promotions from within
- Increase skills for Managers and Supervisors for increased coaching and skill development of staff under their supervision.

The proposed training focuses mainly on training newly hired staff and select incumbent workers on Manufacturing Skills. This proposal assists Headway in reaching their efficiency and cross training goals related to increasing production line activities, and decreasing waste. The proposal also reinforces continued hiring and intensive training to meet demands for highly-skilled workers in their Milpitas locations. Incumbent workers (Job Number 1 & 2) will receive customized coursework that was not delivered under any previous ETP Agreements.

### **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. Headway has committed to hiring 75 new employees (Job Number 3). Trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

The Company completed the installation of a 14,700 square foot clean room space in 2015 and during the proposed contract expects to train staff on recently purchased production equipment and software (estimated value of \$35M). Headway expects to add at least 75 more net new jobs over the next 21 months at its Milpitas facilities to handle company growth. Headway also plans to add approximately 9,000 additional square feet of manufacturing space which will be added by the end November 2018. The majority of the net-new jobs will be in production related occupations at their manufacturing operations facility.

### **Training Plan**

Headway'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 and up to 40 hours of PL per trainee.

**Business Skills:** Training will be offered to Supervisors, Managers, Technical Staff, Technicians, Engineers, Administrative Staff, and Production Staff to increase worker knowledge with leadership, products, improve accounting skills, increase customer satisfaction and improve marketing. Training will also support career advancement and meet succession planning goals. Training will include topics such as Customer Service, Marketing, and Project Management.

**Computer Skills:** Training will be offered to Engineers, Managers, Supervisors, Technical Staff, and Administrative Staff. Topics include Microsoft intermediate application upgrades, MESA, an operating system used to track work is going to the correct next step in the manufacturing process will be provided. Systems tools for Engineers such as JMP/CAD will be delivered to Engineers. Training is designed to upgrade skills to keep Headway competitive.

**Manufacturing Skills:** Training will be offered to Production Staff, Technicians, Supervisors, Managers and Engineers. Topics include Cross Training, Maintenance and Cleanroom Certification. The Company will offer some training across occupations to build and maintain specialized manufacturing skills. Goals include increasing skills to improve and speed productivity.

**Continuous Improvement:** All occupations will receive training applicable to quality improvement initiatives and Lean implementation to improve efficiency and meet goals to reduce costs by \$5M per year. Topics such as Quality Audit Processes, High Performance Work-Teams, and Good Manufacturing Practices will be delivered.

### **Productive Lab**

The Panel reimburses for training delivered in a Productive Lab (PL) setting. PL trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training. An estimated 200



Production Staff and Technician trainees will receive PL training from experienced in-house operators to operate equipment and produce disk drive components.

Trainees will receive up to 40 hours of PL, with a 1:1 trainer-to-trainee ratio. Headway routinely delivers up to 250 PL hours annually to Production Staff. However, this request for up to 40 hours per trainee is specifically related to training needed to operate new equipment and processes. Many of the machines require competency before they can be safely operated independently. Certifications for operating new machines (Photo, Plating, Polish, Vacuum, Cleanroom and Wafer Handling) will increase productivity, help avoid personal injury or decrease product damage.

### **Commitment to Training**

Headway's annual training budget is \$344,000 in California between four facilities. Headway's existing structured training covers new-hire orientation, compliance training, health and safety, basic computer skills, and department specific training requests, 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

Headway has a structured training department with four dedicated internal Administrators and over 100 in-house trainers. Training is scheduled to be delivered in-house with some California based vendors.

### **Substantial Contribution**

Headway is a repeat contractor with payment earned in excess of \$250,000 within the past five years at its Milpitas facility. Accordingly, reimbursement for trainees in Job Number 2 will be reduced by 30% to reflect the Company's \$58,320 Substantial Contribution to the cost of training. In accordance with ETP guidelines, Job Creation (Job Number 3) is not subject to substantial contribution requirements.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0226	Milpitas (4 locations)	11/6/15- 11/5/17	\$580,629	\$522,240 (90%)
ET14-0257	Milpitas (4 locations)	2/3/14 – 2/2/16	\$336,540	\$319,759 (95%)
ET13-0135	Milpitas (4 locations)	9/10/12 – 9/09/14	\$99,538	\$99,538 (100%)

**DEVELOPMENT SERVICES**

California Training Administration in San Jose assisted with development for a flat fee of \$2,500.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

Hidden Inc. La Jolla CA, Manufacturing Skills.  
Computer Magic, San Jose, Computer Skills.

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

8-200

Job Number 1 and 2 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Development / Marketing
- Client Communication Skills
- Customer Service (CSI)
- Effective Presentations
- Efficiency / Quality Improvements
- Finance / Accounting Processes
- Headway Product Training
- Negotiation Skills / Professionalism
- Project Management
- Strategic Implementation / Strategic Planning
- Support Skills (Customer, Supplier, Sales)

**COMPUTER SKILLS**

- Adobe
- DCS – Document Control System
- Strategic Talent Management Software (TEDS, EVERFI)
- Microsoft Tools (Word, Excel, PowerPoint – Int. & Adv only)
- PeopleSoft
- SharePoint
- Systems and Tools
- JMP / SAS (software / programming languages)
- CAD (Computer Aided Design)
- IBM – i5 Operating System Training
- IBM – RPG Programming Training
- SysIS – Understanding MESA system architecture
- Outlook
- PeopleSoft
- AST – Applicant tracking system (CareerBuilder)
- Dynamics Tools
- ADP Payroll tools
- PlanSource Portal
- Marketing Advertising Tools

**CONTINUOUS IMPROVEMENT**

- Business Etiquette
- Quality Audit Processes (ASQ Certification)
- Customer Communications (Internal/External)
- Effective Communications
- Efficiency / Quality Improvements
- GMP – Good Manufacturing Practices
- High Performance Work-Teams HPWT
- Managing Multiple Priorities / Time-sensitive Deadlines
- New Lead / Supervisor Techniques
- Problem Solving / Process Improvement / Process Innovation
- Project Management Skills
- Quality 101 / Lean Quality Improvements
- SPC (Writer & Reader)

- Team Building / Team Meetings / Relationship Building
- Situational Leadership
  - Managing & Leading Change
  - Coaching / Motivating Others to Excellence
  - Motivating Employees in the Work Place
  - Improving Job Performance
  - Handling Difficult Situations
  - Train the Trainer

### **MANUFACTURING SKILLS**

- Manufacturing Process Instruction (MPI)
  - Photolithography
  - Vacuum
  - Plating
  - Polish
- Advanced Expeditor Training
- Supply Chain & Inventory Certification (APICS)
- Cleanroom Certification
- Data Storage Devices
- FDT Specifications (Field Device Tool)
- Final Inspection
- Material / Product Handling
- HDD Technology (Hard Disk Drive)
- Job Skills Update / Work Instructions WI
- Machine Shop Process / ESD (electrostatic discharge)
- Reader / Writer Process Review
- Shipping / Receiving Techniques
- Wafer Mishandling / Batch Wafers
- Warehouse & Inventory Processes
- Manufacturing Cross Training
- Clarification: Critical Scrap Investigation (CSI)
- Industrial Electronics
- Lock Out/Tag Out (LOTO)
- Vacuum Theory / Vacuum Equipment
- PLC Controls (Programmable Logic Controller)
  - Parker Motion
  - Yaskawa
  - NSK (calibration meter)
- Advanced Mechanical Design
- Design Techniques
- Engineering Process Instruction (EPI)
- Hidden EndPoint Knowledge
- Nano-Scale Applications
- Process Review (Reader / Writer)
- Product Development
- TAMR Development (Thermal Assisted Magnetic Recording)

### **Productive Lab (PL) Hours**

0-40

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

- Manufacturing Process Instruction (MPI)

- Equipment Certification
- Equipment Maintenance
- Material Handling
- Operating Production Equipment
- Testing / Troubleshooting

**Class/Lab**

8-200

Job Number 3 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Customer Service (CSI)
- Effective Presentations
- Efficiency / Quality Improvements
- Headway Product Training
- Project Management
- Support Skills (Customer, Supplier, Sales)

**COMPUTER SKILLS**

- Adobe
- DCS – Document Control System
- Microsoft Tools (Word, Excel, PowerPoint – Int. & Adv only)
- CAD (Computer Aided Design)
- IBM – i5 Operating System Training
- IBM – RPG Programming Training
- SysIS – Understanding MESA system architecture

**CONTINUOUS IMPROVEMENT**

- Customer Communications (Internal/External)
- Effective Communications
- Efficiency / Quality Improvements
- GMP – Good Manufacturing Practices
- High Performance Work-Teams HPWT
- Managing Multiple Priorities / Time-sensitive Deadlines
- New Lead / Supervisor Techniques
- Problem Solving / Process Improvement / Process Innovation
- Project Management Skills
- Quality 101 / Lean Quality Improvements / Quality Audits
- SPC (Writer & Reader)
- Team Building / Team Meetings / Relationship Building
- Leadership/Coaching

**MANUFACTURING SKILLS**

- Manufacturing Process Instruction (MPI)
  - Photolithography
  - Vacuum
  - Plating
  - Polish
- Supply Chain & Inventory Certification (APICS)
- Cleanroom Certification
- FDT Specifications (Field Device Tool)
- Final Inspection

- Material / Product Handling
- HDD Technology (Hard Disk Drive)
- Job Skills Update / Work Instructions WI
- Machine Shop Process / ESD (electrostatic discharge)
- Reader / Writer Process Review
- Shipping / Receiving Techniques
- Wafer Mishandling / Batch Wafers
- Warehouse & Inventory Processes
- Clarification: Critical Scrap Investigation (CSI)
- Industrial Electronics
- Vacuum Theory / Vacuum Equipment
- Advanced Mechanical Design
- Design Techniques
- Engineering Process Instruction (EPI)
- Hidden EndPoint Knowledge
- Nano-Scale Applications
- Process Review (Reader / Writer)
- Product Development
- TAMR Development (Thermal Assisted Magnetic Recording)
- Manufacturing Cross training
- Maintenance and Equipment Procedures

### **Productive Lab (PL) Hours**

0-40

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

- Manufacturing Process Instruction (MPI)
  - Equipment Certification
  - Equipment Maintenance
  - Material Handling
  - Operating Production Equipment
  - Testing / Troubleshooting

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

Training Proposal for:

**ISEC, Incorporated**

**Agreement Number: ET18-0183**

**Panel Meeting of:** March 23, 2018

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

**Analyst:** C. Hoover

### PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Construction  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, San Mateo, Orange, San Bernardino, Ventura, San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Carpenters 46 Northern California Counties Conference Board and Southwest Carpenters Training Fund		
Number of Employees in:	CA: 620	U.S.: 1,200	Worldwide: 1,200
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	8%		

### FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$337,600		\$0	\$0		\$337,600

In-Kind Contribution:	100% of Total ETP Funding Required	\$496,000
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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'l Skills, Computer Skills, Cont. Imp., Mgmt. Skills, HazMat, PL-Comm'l Skills	500	8-200	0-40	\$576	\$16.70
				Weighted Avg: 32			
2	Job Creation Retrainee Priority Rate	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp., Mgmt. Skills, HazMat, PL-Comm'l Skills	62	8-200	0-40	\$800	\$13.66
				Weighted Avg: 40			

**Minimum Wage by County:** Job Number 1: \$18.22 per hour for Alameda and San Mateo counties; \$17.50 per hour for Orange County; \$17.03 per hour for San Diego County; \$16.70 per hour for all other counties.

Job Number 2 (Job Creation): \$15.18 per hour for Alameda and San Mateo counties; \$14.58 per hour for Orange County; \$14.19 per hour for San Diego County; \$13.66 per hour for all other counties.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Carpenter I		50
Administrative Staff		35
Carpenter II		207
Project Manager/Engineer		147
Estimator		20
Field Manager		23
Manager		18
<b>Job Number 2</b>		
Carpenter I		17
Administrative Staff		4



Carpenter II		17
Project Manager/Engineer		15
Estimator		3
Field Manager		4
Manager		2

## **INTRODUCTION**

Founded in 1967 and headquartered in Colorado, ISEC, Incorporated (ISEC) ([www.isecinc.com](http://www.isecinc.com)) is a construction company that focuses on woodwork projects. ISEC provides innovative solutions in architectural woodwork, ornamental metals, doors, frames & hardware, laboratory and medical furniture. The Company works with major commercial subcontractors on construction projects ranging from schools, airports and hospitals. Its main customers are general contractors, architectural firms, government agencies and other commercial property owners.

ISEC began providing furniture and athletic equipment in schools. It has since expanded into the healthcare and laboratory industries. It has facilities across the nation with California facilities in Dixon, South San Francisco, Fremont, La Palma, Ontario, Thousand Oaks and San Diego where training will occur.

Some of the major projects that ISEC is currently working on include:

- Los Angeles International Airport
- Facebook's Menlo Park Building 21
- San Francisco International Airport
- Gilead Sciences Campus
- San Diego Airport

## **Union Support**

The training project is supported by Carpenters 46 Northern California Counties Conference Board (Carpenters 46) and Southwest Carpenters Training Fund, which represents the unionized workers within ISEC. A union letter of support has been submitted by Carpenters 46. Occupations under the Southwest Carpenters Training Fund can not start training until a letter of support has been received.

## **Need for Training**

ISEC's projects are often unique, and therefore it must train its employees on new construction techniques and mechanisms, and how to use them effectively and safely. For example, ISEC recently started working with detailed 3D-laser mapping (scanners) used for building surveying, building footprints or demolition planning. With new industry trends, the Company has expanded into complex glass walls and railings, which requires its employees to learn new construction-modeling techniques and installation.

ISEC will be delivering specialized training on its innovative architectural woodworking design and process to its Carpenters. This training will increase the carpenters' skills on new tools and expand their knowledge on the latest technologies. This will help the Company to remain competitive and to be leaders in the construction industry.

In addition, ISEC is replacing its software system and launching a new complex project-management software. This will allow for a greater ability to communicate with both its employees as well as its customers on project details. This new system will require a significant amount of training to ensure an effective company-wide launch.

The overall training goals for ISEC is to make its employees more efficient with high levels of safety in their work through advanced knowledge in the use of construction practices and equipment. ETP funding will help the Company expand its employees' knowledge and skills that are shown through internal measures and performance resulting in continual company growth.

### **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 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.

ISEC has committed to hiring 62 new employees (Job Number 2) to support anticipated growth of 10 to 15% annually. The Company reports an ever-growing number of large projects that are starting across California over the next few years. ISEC reports approximately \$160 million in sales in California this fiscal year. During the Company's next fiscal year, it is projected to grow to \$180 million in sales. ISEC has been given additional expansion projects at LAX, Gilead Sciences Campus, SFO, Facebook. Many of the current projects are multiyear projects.

### **PROJECT DETAILS**

Training will be delivered vis Class/Lab, E-Learning, Productive Lab (PL) and Computer-Based Training (CBT) in the following:

#### **Training Plan**

**Business Skills:** Training will be offered to all occupations. Courses include Accounting, Inventory Control, Product Knowledge, Financial Strategies, Business Performance, Communication Skills, Payroll Systems, Negotiating, Conflict Management and Business Administration. Managers and management trainees will receive Health Insurance Portability and Accountability. Administrative Staff will train in customer-service skills.

**Commercial Skills:** Training will be offered to Carpenters I, Carpenters II, Project Managers/Engineers, Field Managers and Managers. Courses in Construction Management, Materials Knowledge, Product Installation, Product Repair and Safety Standards will be delivered. Carpenters I and II will receive training on handling of specialized tools and equipment such as saws, drills, jacks, lasers, hand tools, nailers, and adhesives equipment required to complete complex construction projects.

**Management Skills:** This training will be offered to Managers and Field Managers in Leadership, Decision Making, Motivation, Team Building and Coaching to gain new leadership, inspirational and change-management skills.

**Computer Skills:** Training will be offered to Estimators, Managers, Administrative Staff, Project Managers/Engineers and Field Managers. Courses in Microsoft Office Suite (Intermediate/Advanced), Internet Navigations (SharePoint), Office Automation, Computer-Assisted Design, Computer-Aided Manufacturing, and Printer and Plotter Use will be delivered. All occupations will receive training on ISEC's new project management software.

**Hazardous Materials:** Training will be offered to all occupations. Courses in Hazardous Materials Handling, Hazardous Chemical Cleaning/Handling, and Hazardous Waste Cleaning will be delivered.

**Continuous Improvement:** Training will be offered to Carpenters I, Carpenters II, Estimators, Managers, Administrative Staff, Project Managers/Engineers, Field Managers and Managers. Courses in Project Management, Strategic Planning, and Evaluations and Monitoring to better track internal finances, appraisals and product control.

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

CBT will allow employees to take courses at their own pace without instructors.

### **Productive Laboratory**

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. Instructors will be subject matter experts in the area being trained.

ISEC will deliver up to 40 hours of PL- Commercial Skills' training per trainee to an estimated 400 field employees including the Carpenters and Project Managers/Engineers on the following:

- Proper Tool Usage
- How to Perform Custom Work
- Safety Protocols
- How to Install Custom Equipment
- How to Create Unique Custom Work

The PL training will be delivered using a trainer-to-trainee ratio of 1:1. The intent of the PL training is for the trainee to gain greater efficiency in doing their work over the long term with lower defect levels.

### **Commitment to Training**

ETP funds will not displace its existing financial commitment to training. The Company spends approximately \$83,000 on training annually per facility in CA. ISEC currently provides at least 20 hours of training in job-specific training and company-wide on the content needed. ISEC currently uses classroom, E-learning, On-the-job and CBT delivery methods.

Safety training is provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

The Corporate Training Team (Director of Education and the Trainer and Curriculum Designer) will oversee administration. ISEC's California-based training is broken out into three regions with Regional Managers located in San Diego, San Francisco and La Palma offices. These Regional Office Managers will manage the daily documentation of training activities. They will coordinate with Operations Managers located at each facility with assistance from the local Training and HR administrators. Training will be delivered by in-house experts.

## **Electronic Recordkeeping**

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

## **RECOMMENDATION**

Staff recommends approval of this proposal.

## **DEVELOPMENT SERVICES**

N/A

## **ADMINISTRATIVE SERVICES**

N/A

## **TRAINING VENDORS**

N/A

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

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Business Performance
- Accounting
- Payroll Systems
- Business Plans
- Business Administration
- Financial Strategies
- Inventory Control
- Product Knowledge
- Communication Skills
- Business-Report Writing and Editing
- Negotiating
- Conflict Management
- Interpersonal Skills
- HIPAA Training

**COMMERCIAL SKILLS**

- Construction Management
- Use of Tools/Equipment:
  - Chop Saws
  - Table Saws
  - Jig Saws
  - Hand Saws
  - Circular Saws
  - Drills
  - Pallet Jacks
  - Ladders
  - Lasers
  - Sanders
  - Routers
  - Hand Tools
  - Forklifts
  - Scissor Lifts
  - Boom Lifts
  - Scaffolding
  - Porta Bands
  - Grinders
  - Pin Nailers
  - Hard Nailers
  - Harnesses
  - Face Shields
  - Hot-Work Equipment
  - Adhesives
  - Epoxy
  - Silicones
  - Polyurethanes

- Caulking
- Lacquers and Denatured Alcohol
- Bondo
- Glass Cups
- Material-Movement Equipment
- Fume-Hood Lifts
- Hoists
- Materials Knowledge
- Product Installation
- Product Repair
- Safety Standards
- Blueprint Reading

### **COMPUTER SKILLS**

- MS Office Suite (Intermediate/Advanced)
- Microsoft OneNote Software
- Internet Navigations (SharePoint)
- Box (Document-Management Software)
- Bluebeam Software
- Computer-Assisted Design
- Computer-Aided Manufacturing
- Printer and Plotter Use
- Project Management (PlanGrid software)
- Building Information Modeling Software

### **CONTINUOUS IMPROVEMENT**

- Project Management
- Strategic Planning
- Evaluations and Monitoring
- Using Drawings to Coordinate Install
- Pre-Install Coordination
- Estimating & Product Control

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

- Leadership
- Decision Making
- Motivation
- Team Building
- Coaching

### **HAZARDOUS MATERIALS**

- Hazardous Materials Handling
- Hazardous Chemical Cleaning/Handling
- Hazardous Waste Cleaning

**Productive Lab Hours**

0-40

**COMMERCIAL SKILLS** (Ratio 1:1)

- Use of Tools/Equipment:
  - Chop Saws
  - Table Saws
  - Jig Saws
  - Hand Saws
  - Circular Saws
  - Drills
  - Pallet Jacks
  - Ladders
  - Lasers
  - Sanders
  - Routers
  - Hand Tools
  - Forklifts
  - Scissor Lifts
  - Boom Lifts
  - Scaffolding
  - Porta Bands
  - Grinders
  - Pin Nailers
  - Hard Nailers
  - Harnesses
  - Face Shields
  - Hot-Work Equipment
  - Adhesives
  - Epoxy
  - Silicones
  - Polyurethanes
  - Caulking
  - Lacquers and Denatured Alcohol
  - Bondo
  - Glass Cups
  - Material-Movement Equipment
  - Fume-Hood Lifts
  - Hoists
- Product Installation
- Product Repair

**CBT Hours**

0-40

**BUSINESS SKILLS**

- Accounts Payable (0.5 hours)
- Accounting Basics (0.5 hours)
- Common Accounting Errors (0.5 hours)

**COMPUTER SKILLS**

- Bluebeam: Auto Mark & Batch Link (0.5 hours)
- Bluebeam: OCR & PDF (0.5 hours)

- Bluebeam: Features, Pages & Storage (1.0 hour)
- Bluebeam: Customization & Markups (1.25 hours)
- Bluebeam: Tools (0.5 hours)
- Microsoft OneNote: Folder Structure Documentation Process (1.25 hours)

### **COMMERCIAL SKILLS**

- ISEC Cutting Best Practices (0.5 hours)
- Wall Installation (0.5 hours)
- Equipment Install (0.5 hours)
- Paneling Installation (0.75 hours)
- Door Install (0.5 hours)
- Carpentry Install (0.5 hours)

### **CONTINUOUS IMPROVEMENT**

- Project Engineering: Document Control (1.0 hour)
- Project Engineering: Field Quality Control (1.0 hour)
- Project Engineering: Pre-Install (0.5 hours)
- Project Engineering: Cost to Complete & Reporting (1.25 hours)
- Project Management: Financial (1.0 hour)
- Project Management: Deliveries (0.5 hours)
- Project Management: Tracking Finances (1.0 hour)
- Using Drawings to Coordinate Install (1.5 hours)
- Pre-Install Coordination (0.75 hours)
- Estimating & Product Control (3.75 hours)

### **MANAGEMENT SKILLS**

- Leadership 101 (0.5 hours)
- Inspirational Leadership (0.75 hours)
- Change Management (0.75 hours)

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee excluding HAZMAT. PL is capped at 40 hours per-trainee.



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# CARPENTERS

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46 Northern California Counties Conference Board

**BILL FEYLING**

Executive Director

February 13, 2018

John Fritschler  
Director of Education  
ISEC, Inc.  
6000 Greenwood Plaza Rd.  
Greenwood Village, CO 80111

**RE: Employment Training Panel (ETP) Funding**

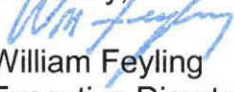
Dear Mr. Fritschler:

I am writing to you in reference to the ISEC, Inc. request for support of the Employment Training Panel Program, State Funded by the California Labor and Workforce Development that ISEC, Inc. wants to administer in their facility.

Please be advised that Carpenters 46 Northern California Counties Conference Board is in full support of such request based on the understanding and assurance that affected employees will be compensated as per the collective bargaining agreement.

Should you have any questions regarding this matter, please feel free to contact this office.

Sincerely,

  
William Feyling  
Executive Director

WF:jcm



## RETRAINEE - JOB CREATION

### Training Proposal for:

## Certified Stainless Service, Inc. dba West-Mark

**Agreement Number: ET18-0191**

**Panel Meeting of:** March 23, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Jones

### PROJECT PROFILE

<b>Contract Attributes:</b>	Retrainee Priority Rate Job Creation Initiative Veterans HUA	<b>Industry Sector(s):</b>	Manufacturing  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<b>Counties Served:</b>	Kern, Merced, Stanislaus	<b>Repeat Contractor:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<b>Union(s):</b>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>Number of Employees in:</b>	CA: 172	U.S.:180	Worldwide: 180
<b>Turnover Rate:</b>	15%		
<b>Managers/Supervisors:</b> (% of total trainees)	9%		

### FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$282,000</td></tr> </table>	Program Costs	\$282,000	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">(Substantial Contribution)</td> <td style="text-align: center;">(High Earner Reduction)</td> </tr> <tr> <td style="text-align: center;">\$0</td> <td style="text-align: center;">\$0</td> </tr> </table>	(Substantial Contribution)	(High Earner Reduction)	\$0	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;"><b>Total ETP Funding</b></td></tr> <tr><td style="text-align: center;">\$282,000</td></tr> </table>	<b>Total ETP Funding</b>	\$282,000
Program Costs												
\$282,000												
(Substantial Contribution)	(High Earner Reduction)											
\$0	\$0											
<b>Total ETP Funding</b>												
\$282,000												

<b>In-Kind Contribution:</b>	100% of Total ETP Funding Required	\$379,200
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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 HUA	Business Skills, Computer Skills, Continuous Impr, Management Skills, Manufacturing Skills, PL-Mfg Skills	160	8-200	0	\$1,350	\$12.53*
				Weighted Avg: 75			
2	Veterans HUA	Business Skills, Computer Skills, Continuous Impr, Management Skills, Manufacturing Skills, PL-Mfg Skills	10	8-200	0	\$1,650	\$12.53*
				Weighted Avg: 75			
3	Job Creation Initiative Priority Rate HUA	Business Skills, Computer Skills, Continuous Impr, Management Skills, Manufacturing Skills, PL-Mfg Skills	33	8-200	0	\$1,500	\$11.00*
				Weighted Avg: 75			

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

**Minimum Wage by County:** Job Numbers 1 and 2 (HUA): \$12.53 per hour for Kern, Merced, and Stanislaus counties and Job Number 3 (HUA/Job Creation): \$11.00 per hour for Kern, Merced, 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

Although provided by the Company, Health Benefits are not being used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Number 1</b>		
Administrative Staff		20
Engineering Staff		20
Production Staff		70
Quality Control Staff		15
Sales Staff		20
Supervisors		15

<b>Job Number 2 (Veterans)</b>		
Administrative Staff		1
Engineering Staff		3
Production Staff		2
Quality Control Staff		1
Sales Staff		1
Supervisors		2
<b>Job Number 3 (Job Creation)</b>		
Administrative Staff		1
Engineering Staff		1
Production Staff		24
Quality Control Staff		3
Sales Staff		1
Supervisors		3

**INTRODUCTION**

Founded in 1967, and headquartered in Ceres, Certified Stainless Service, Inc. dba West-Mark (Certified Stainless) ([www.west-mark.com](http://www.west-mark.com)) manufactures tanks and trucking equipment used to transport and deliver liquids. The Company's products are used by customers in the Emergency, Petroleum and Energy, Construction, Military, and Food and Agriculture Industries.

Certified Stainless has four facilities in California; Atwater, Bakersfield and two in Ceres. (The Company also has a facility located in Fairbanks, Alaska.) All facilities located in California will receive training under this proposal.

**PROJECT DETAILS**

This will be Certified Stainless' fifth ETP Agreement and the third in the last five years. Under the previous Agreement, training focused on an internal training certification program which increased skills and opened promotional opportunities for employees. Training also focused on customer service techniques and quality control procedures. There will be no duplication of training for the trainees who participated in the prior contract.

Certified Stainless recently launched an international sales program designed to showcase products and manufacturing capabilities to compete internationally for government and corporate contracts. However, to do this, the Company must become certified in ISO 9001 and ISO 14008. These certifications will help the Company meet international production standards.

Additionally, Certified Stainless was recently awarded a military contract for production of 1,700 non-combat logistical trailers. Training will cover new production techniques and quality control procedures to ensure efficient production.

## 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.

Certified Stainless is expanding business capacity by hiring new employees. The Company is also adding a new painting facility to the Atwater location. The addition of a painting facility will allow the Company to paint products on site. The Company has committed to hiring 33 new full time permanent employees (Job Number 2). The new positions will fill needs in Administrative, Engineering, Quality Control, Production, Supervisor, and Sales occupations. 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

Certified Stainless will provide Class/Lab and Productive Lab training delivered by in-house subject-matter experts and vendors, if necessary.

**Business Skills:** Training will be offered to all occupations to enhance production goals. Training will increase customer satisfaction and knowledge of business processes. Training topics include Integrated Sales Management, Customer Service, Supply Chain Management, and Contract/Project Management.

**Computer Skills:** Training will be offered to Administrative Staff, Engineering Staff, Sales Staff, and Supervisors. Training topics include Enterprise Resource Planning, Solid Modeling Engineering, and Content Management System to optimize software and systems utilization.

**Continuous Improvement:** Training will be offered to all staff. Training is intended for information symmetry across departments and assures fluidity of work-flow and department roles. Training will also improve quality control and decrease product turn-around while reducing waste. Training topics include Quality Management System, and Product Research and Development.

**Management Skills:** Training will be offered to Supervisors only and will include Leadership & Management Training Program and Train-the-Trainer.

**Manufacturing Skills:** Training will be offered to Production Staff, Engineering Staff, Sales Staff, and Supervisors. Training will focus on new production techniques and Lean processes to ensure efficient production. Training topics include Production Core Training, Service Technician Core Training, Advanced Safety Training, and Advanced Lean Management.

## Productive Laboratory (PL)

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

Certified Stainless will train 100 Production Staff on production equipment, assembly, finishing and welding. Topics are conducted in the classroom first to introduce trainees to machinery and concepts. PL training is necessary to ensure safety and production standards are being met. Training will be at a much slower pace than regular production with significantly higher defects as trainees gain proficiency.

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

The Company requests a 1:3 trainer-to-trainee ratio since equipment requires three staff to operate. PL training will be capped at 40 hours per trainee.

**Substantial Contribution**

Although Certified Stainless is a repeat contractor, no one facility has earned payment in excess of \$250,000. Therefore, substantial contribution does not apply.

**Commitment to Training**

The Company's current annual training budget is approximately \$250,000 per year. Training programs include new hire orientation, sexual harassment prevention, safety, and computer skills 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

Certified Stainless' Chief Financial Officer (CFO) will oversee the training plan and will work with three training coordinators to execute the training plan. Training coordinator's will schedule and coordinate all training efforts for staff and an administrative assistant will track record keeping documents and complete all administrative duties. Each location will also have a designated person to collect rosters. On a monthly basis, the training progress will be reported back to the CFO.

Certified Stainless already has a proven process in place to ensure all administrative duties are handled properly and all managers and trainers are aware of their responsibilities.

**Veterans Program**

Certified Stainless has committed to training 10 veterans under this project.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0353	Atwater, Bakersfield, Ceres	2/1/2016 – 1/31/2018	\$340,560	\$325,610 (96%)
ET14-0385	Atwater, Bakersfield, Ceres	4/28/2014 – 4/27/2016	\$274,400	\$247,554 (90%)

**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**

- Contract/Project Management
- Customer Service
- Employee Relations
- Integrated Sales Management
- Supply Chain Management
- Time Management

**COMPUTER SKILLS**

- Computer-Assisted Drawing (CAD)
- Computer-Assisted Machinery (CAM)
- Content Management System
- Document Management Software: Crystal-Sharepoint
- Enterprise Resource Planning
- Quality Management System
- Solid Modeling Engineering

**CONTINUOUS IMPROVEMENT**

- Adaptive Manufacturing
- Advanced Lean Manufacturing
- Advanced Safety Training
- Handling, Disposal, Clean-Up of Hazardous Materials
- Intersectoral Operations and Relations
- Product Research and Development
- Quality Control Systems

**MANAGEMENT SKILLS** (Supervisors only)

- Leadership & Management Training Program
- Train-the-Trainer

**MANUFACTURING SKILLS**

- Advanced Assembly Practices
- Advanced Finishing Practices
- Advanced Lean Management
- Advanced Operator Training: Production Equipment, Material Handling & Maintenance
- Advanced Safety Training
- Advanced Welding (S/S & Aluminum) - Phase 2
- Cross Training
- Production Core Training
- Production Standards: ASME/ISO Standards
- Service Technician Core Training



**Productive Lab Hours**

0-40

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

- Advanced Assembly Practices
- Advanced Finishing Practices
- Advanced Operator Training: Production Equipment, Material Handling & Maintenance
- Advanced Welding (S/S & Aluminum) - Phase 2
- Authorized Inspector Training

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

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



**RETRAINEE - JOB CREATION**

**Training Proposal for:**

**Covenant Care California, LLC**

**Agreement Number: ET18-0186**

**Panel Meeting of:** March 23, 2018

**ETP Regional Office:** Sacramento

**Analyst:** K. Mam

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative Medical Skills Training SET HUA	Industry Sector(s):	Healthcare  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno, Stanislaus, Ventura, Orange, Yolo, San Joaquin, Los Angeles, San Diego, Santa Cruz, 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: 3,644	U.S.:6,110	Worldwide: 6,110
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$749,496		\$0	\$0		\$749,496

<b>In-Kind Contribution:</b>	<b>100% of Total ETP Funding Required</b>	<b>\$1,314,992</b>
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	SET Medical Skills Training	MS Didactic, MS Preceptor, Computer Skills, Continuous Impr	597	8-200	0	\$396	\$22.77
				Weighted Avg: 22			
2	SET HUA Medical Skills Training	MS Didactic, MS Preceptor, Computer Skills, Continuous Impr	273	8-200	0	\$468	\$12.53*
				Weighted Avg: 26			
3	SET Job Creation Initiative Medical Skills Training	MS Didactic, MS Preceptor, Computer Skills, Continuous Impr	81	8-200	0	\$2,280	\$13.66*
				Weighted Avg: 114			
4	SET HUA Job Creation Initiative Medical Skills Training	MS Didactic, MS Preceptor, Computer Skills, Continuous Impr	88	8-200	0	\$2,280	\$11.00*
				Weighted Avg: 114			

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

**Minimum Wage by County:** **Job Number 1** (SET/Priority Industry): \$22.77 per hour. **Job Number 2** (SET/HUA): \$12.53 per hour for Fresno, Stanislaus, San Joaquin, and Santa Cruz Counties. **Job Number 3** (Job Creation): \$15.18 per hour for Santa Clara County, \$14.19 for San Diego County, and \$14.62 for Los Angeles County. **Job Number 4** (Job Creation/HUA): \$11.00 per hour for Fresno, Stanislaus, San Joaquin, and Santa Cruz 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 \$1.77 per hour may be used to meet the Post-Retention Wage for Job Number 1.  
 Up to \$0.75 per hour may be used to meet the Post-Retention Wage for Job Number 2.  
 Up to \$1.87 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
<b>Job Number 1 (Retrainee)</b>		
Registered Nurse		234
Licensed Vocational Nurse		363
<b>Job Number 2 (Retrainee/HUA)</b>		
Certified Nurse Assistant		273

<b>Job Number 3 (Job Creation)</b>		
Certified Nurse Assistant		81
<b>Job Number 4 (Job Creation/HUA)</b>		
Certified Nurse Assistant		88

## **INTRODUCTION**

Founded in 1994 and headquartered in Aliso Viejo, Covenant Care California, LLC (Covenant Care) (<https://www.covenantcare.com/>) and its affiliates specialize in skilled nursing care and rehabilitation services such as short-term and long-term nursing care, medication management and developmental disabilities.

Covenant Care California will serve as the lead employer in this proposal with its six affiliates: Covenant Care Capitola, LLC; Covenant Care Encinitas, LLC; Covenant Care La Jolla, LLC; Covenant Care Lodi, LLC; Covenant Care Mission, LLC; and Covenant Care Morgan Hill, LLC. Training under this proposal will include 21 locations throughout California.

## **PROJECT DETAILS**

This is Covenant Care's third ETP Agreement, and the third in the last five years. In this proposal, Covenant Care will continue to build on previous training of adapting to changes brought about by the Affordable Care Act, improving patient care, increasing nurse skillsets, and learning the new Electronic Medical Record (EMR) Software. To ensure quality standards are met, the Company implemented a new Quality Assurance/Performance Improvement (QAPI) program which focuses on addressing care and management practices including clinical care, quality of life, and resident choice. Training will ensure all regulatory changes are met while improving quality processes, outcomes, and measures.

Additionally, the Company will provide Antibiotic Stewardship, Infection Control Training, and Advanced Communication Skills. Training will allow the Company to accept a higher percentage of high acuity patients while ensuring staff will provide proper care and services to patients.

### **Retrainee - Job Creation**

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

The Company is expanding its workforce to meet new staff to patient ratios due to new mandates under SB97. In order to meet ratio requirements, Covenant Care has committed to hiring 169 new Certified Nurse Assistants (Job Number 3 and 4). The Company has established a Certified Nurse Assistant training program consisting of extensive classroom and clinical training to prepare staff with standardized skillsets to ensure successful transition of newly hired Certified Nurse Assistant into a fast-paced work environment.

The date-of-hire for trainees will be within the three-month period prior to Panel approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

## Training Plan

### Medical Skills Training

Approximately 1039 trainees including Registered Nurses, Licensed Vocational Nurses, and Certified Nurse Assistants will participate in clinical skills training, including both didactic and clinical preceptor training.

Classroom/laboratory training will be provided by in-house subject matter experts and vendors to all occupations on advanced clinical processes to ensure competency and maximize patient satisfaction and safety. Training includes Psychotropic Medication Management, Behavioral Health Skills, Enteral Feeding Tube Management, Medication Monitoring, and Activities of Daily Living.

**Computer Skills:** Training will be offered to all occupations. Training will focus on use of Electronic Medical Records software updates to accurately enter and retrieve patient information.

**Continuous Improvement:** Training will be offered to all occupations. Training will focus on improving teambuilding and communication skills.

### Commitment to Training

Covenant Care spends up to \$75,000 annually on training at each facility. Employee training includes basic skills updates, sexual harassment prevention, new-hire classroom and preceptor-led training, safety training, fire codes, and mandated 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.

ETP funds will allow the Company to prepare new clinicians for full-time patient care, reduce hospital re-admissions, and meet new quality standards.

#### ➤ Training Infrastructure

The Company is committed to the success of the training plan. The Vice President will oversee this training plan and has designated two staff to manage the ETP Agreement. These staff will plan and schedule training and ensure all aspects of training are uniformly implemented across all participating locations. Each participating location will also have a designated staff member to facilitate training and roster collection. Additionally, the Company has retained the services of a third-party administrator to help with administration.

### Retention Modifications

Covenant Care is requesting an alternate retention of 500 hours within 272 days for Registered Nurses, Licensed Vocational Nurses, and Certified Nurse Assistants. Healthcare workers are considered to have non-customary work hours and may request an alternate retention to satisfy the retention requirements.

### Full-Time Work Week

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

Covenant Care is requesting to decrease the full-time employment hours from 35 hours per week to 30 hours per week, for Registered Nurses, Licensed Vocational Nurses, and Certified Nurse Assistants. The Company considers employees in these occupations to be full-time at 30 hours per week and eligible for full-time benefits. This is consistent with industry standards.

### **Substantial Contribution**

Although Covenant Care is a repeat contractor, no one facility has payment earned in excess of \$250,000 in incumbent training within the last five years. Therefore, substantial contribution does not apply.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0381	Statewide	03/01/2016– 02/28/2018	\$749,900	\$0 (0%)
ET13-0246	Statewide	02/04/2013- 02/03/2015	\$569,700	\$413.863 (73%)

ET16-0381: Based on ETP Systems, 26,589 reimbursable hours have been tracked in ETP Tracking System for potential earnings of \$535,770 (71% of approved amount). Performance was impacted by the loss of some rosters. To avoid any such administrative issue in this proposal, the Company has retained a third-party subcontractor to assist with administration.

### **DEVELOPMENT SERVICES**

National Training Systems, Inc. in Ladera Ranch assisted with development for a flat fee of \$33,738.

### **ADMINISTRATIVE SERVICES**

National Training Systems, Inc. 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:

**MEDICAL SKILLS – DIDACTIC**

- Antibiotic Stewardship
- Advanced Cardiac Life Support
- Annual Skills Update
- Basic Life Support
- Bedrail Quick Response (QR) Coding
- Bedrail Use and safety
- Behavior Management
- Behavioral Health Skills
- Blood Glucose Testing
- Body Mechanics
- Cardiac Conditions
- Change of Condition Management
- Dementia/Alzheimer's
- Diabetic Management
- End of Life Care
- Enteral Feeding Tube Management
- Equipment Skills (including, but not limited to pumps, vital monitoring devices, support systems, therapeutic modalities)
- Gastrointestinal System
- Incontinence Management (colostomy care, urinary catheter care)
- Infection Control
- Interdisciplinary Team Process
- Intravenous Therapy
- Laboratory
  - Arterial Blood Gas Interpretation
  - Electrolyte Imbalance
- Medication Administration Management
- Medication Monitoring
- Neurological Conditions
- Neurovascular System
- Pain Management (Acute and Chronic)
- Patient Assessment & Care
- Patient Fall Prevention
- Patient Transfer Techniques
- Physical, Occupational, Speech Therapy
- Psychotropic Medication Management
- Resident and Family Education
- Resident Emergency Response
- Residents with Special Needs
- Respiratory Care
- Restorative Nursing
- Restraint and Restraint Reduction
- Safe Injection Training
- Skeletal/Orthopedic Conditions
- Urinary Management (foley catheter, input/output)
- Wound Management

**MEDICAL SKILLS – PRECEPTOR**

- ✚ Inpatient & Outpatient Care Unit
  - Activities of Daily Living
  - Advanced Assessment Skills
  - Advanced Clinical Skills
  - Assessing of Tube-Fed Individuals with Diabetes Mellitus
  - Assisting and Performing Self Care Skills with Patients; Facilitating Functional Gains of Each Patient
  - Bedrail QR Coding
  - Bedrail Use and Safety
  - Bowel and Bladder Training of Patients
  - Breathing Patterns and Respiratory Function
  - Cardiac Conditions
  - Charting
  - Clinical Certification Skills
  - Clinical Skills Review
  - Colostomy Care
  - Conduct Range of Motion Exercises with Patients
  - Dementia Care
  - Dementia/Alzheimer's
  - Enteral Management
    - Bolus
    - Intermittent
    - Continuous
  - Feeding Tube
    - Insertion
    - Removal
    - Site Care
  - Functional Mobility and Ambulation
  - Gastrointestinal Conditions
  - Hazardous Waste Handling
  - Hemovac/Pnuemovac
  - Identification of Patient Change in Condition
  - Identification of Skin Impairments and Prevention
  - Incontinence Management (colostomy care)
  - Infection Control
  - Intravenous Therapy
  - Isolation Techniques
  - Managing Patients with Neurovascular Conditions
  - Medication Management /Black Box Warnings
  - Monitor Blood Pressure of Patients
  - Monitoring of Cardiovascular Changes such as Vital Signs, Endurance, Level of Consciousness
  - Operate Safety Devices with Patients
  - Pain Management
  - Patient Assessment and Care
  - Patient Care of Foot and Hand
  - Patient Safety
  - Positioning of Patients for Correct Body Alignment
  - Preventing and Identifying Complications Related to Tube Feedings
  - Residents with Special Needs
  - Respiratory Care



- Safe Injection Training
- Safe Linen Handling
- Safe Patient Handling
- Skeletal/Orthopedic Conditions
- Use of the Call Light System
- Wound Management

### **COMPUTER SKILLS**

- ✚ Electronic Medical Records Application Skills
- ✚ Electronic Tablet for Bedside Charting
- ✚ Omnicell

### **CONTINUOUS IMPROVEMENT**

- ✚ Administration
- ✚ Building Respect
- ✚ Clinical Services System Management
- ✚ Communication Skills
- ✚ Compliance
- ✚ Conflict Resolution
- ✚ Continuous Quality Improvement Workshop
- ✚ Culturally Appropriate Care
- ✚ Customer Service
- ✚ Documentation
- ✚ Incident/Accident Management
- ✚ Interdepartmental Collaboration
- ✚ Interdisciplinary Team
- ✚ Medical Records
- ✚ Mobility Skills
- ✚ Person Centered Care
- ✚ Problem Analysis and Problem Solving
- ✚ QAPI Process
- ✚ Team Building
- ✚ The Five Star Rating System

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



**Training Proposal for:**  
**Santa Monica Community College District**  
**Agreement Number: ET18-0192**

**Panel Meeting of:** March 23, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** M. Webb

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate SB <100 HUA	Industry Sector(s):	Construction Manufacturing Transportation/Logistics Warehousing Wholesale Trade Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, Riverside, San Bernardino, San Diego, Ventura	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

**FUNDING DETAIL:**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$888,214		\$61,474 8%		\$949,688

In-Kind Contribution:	50% of Total ETP Funding Required	\$964,392
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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 Impr, HazMat, Literacy Skills, Mfg Skills, Mgmt. Skills, OSHA 10/30	327	8-200	0	\$924	\$16.70
				Weighted Avg: 48			
2	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, Literacy Skills, Mfg Skills, Mgmt. Skills, OSHA 10/30	62	8-200	0	\$802	\$16.70
				Weighted Avg: 50			
3	Retrainee Priority Rate SB<100	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, Literacy Skills, Mfg Skills, Mgmt. Skills, OSHA 10/30	365	8-200	0	\$1,362	\$16.70
				Weighted Avg: 49			
4	Retrainee SB<100	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, Literacy Skills, Mfg Skills, Mgmt. Skills, OSHA 10/30	38	8-200	0	\$1,129	\$16.70
				Weighted Avg: 48			
5	Retrainee Priority Rate HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, Literacy Skills, Mfg Skills, Mgmt. Skills, OSHA 10/30	25	8-200	0	\$924	*\$13.66
				Weighted Avg: 48			
6	Retrainee Priority Rate SB<100 HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, Literacy Skills, Mfg Skills, Mgmt. Skills, OSHA 10/30	26	8-200	0	\$1,334	*\$13.66
				Weighted Avg: 48			

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

**Minimum Wage by County:** Job Numbers 1-4: \$17.54 per hour for Los Angeles County; \$17.50 per hour for Orange County; \$17.03 per hour for San Diego County; and \$16.70 per hour for Riverside and Ventura Counties.

Job Number 6(HUA): \$14.62 per hour for Los Angeles County; \$14.58 per hour for Orange County; \$14.19 per hour for San Diego County; and \$13.66 per hour for Riverside and Ventura Counties.

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
Participating employers may use health benefits to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
<b>Job Numbers 1-6</b>		
Administrative Staff I		38
Administrative Staff II		9
Customer Service/Sales Staff I		28
Customer Service/Sales Staff II		8
Production Staff I		238
Production Staff II		32
Finance/Accounting Staff		45
Assembly Worker		66
Technician		52
Warehouse Worker		118
Maintenance Staff		38
Logistics Staff		42
Supervisor/Manager I		45
Supervisor/Manager II		10
Engineer I		37
Engineer II		15
Driver		22

## **INTRODUCTION**

Santa Monica Community College District (SMC) is a two-year public community college located in the City of Santa Monica. SMC, accredited by the Western Association of Schools and Colleges, serves approximately 33,000 students and offers over 90 fields of study. This will be SMC's ninth ETP Agreement, its fourth within the last five years.

## **PROJECT DETAILS**

As the economy continues to grow, Employers (particularly small businesses), have expressed a need to improve operations to remain competitive. As a result, Employers continue to request training curriculum that will increase employees' knowledge and abilities that can lead to improvements in the employer's quality of products manufactured, speed of delivery, and reduction in waste accumulated during the production process. Through training, Employers anticipate an increase in employee skill sets that will also expand market share, allowing businesses to offer customers quality products at reduced costs, as well as manage higher productivity levels and volume.

It is estimated that 75% of participating employers to receive training under this proposal will be small and large manufacturers. Other industries to participate in training will include service organizations, logistics, and warehousing. Trainees will participate in Manufacturing Skills training to increase skills by learning how to operate modernized equipment, and implement lean manufacturing processes within their business.

Training in Continuous Improvement, Business Skills, and Computer Skills, will be provided to trainees to improve staff critical thinking and customer service skills. Training instructors will work with the Company to identify areas of improvement, then develop new processes and planning that will increase efficiencies and improve business operations. SMC has provided sufficient Employer demand to meet the 80% threshold.

SMC has conducted detailed needs assessments with Employers and industry experts. These needs have been discussed with Employer groups and business leaders to provide insight on future needs of the California economy.

### **Training Plan**

Training will be delivered by SMC instructors and outside training vendors (see page 7).

**Business Skills:** Training will be offered to Managers/Supervisors, Administrative, Finance, Customer Service and Sales Staff. Training will improve employees' capabilities to oversee company resources and interact more effectively both internally and with customers.

**Literacy Skills:** Training will be offered to employees who speak English as a second language. Occupations will include Production Staff, Warehouse Workers, Maintenance Staff, Assembly Workers, and Technicians. Training will focus on improving staff's communication in English.

**Commercial Skills:** Training will be offered to Equipment Operators, Warehouse Staff, Technicians, Customer Service, Sales Staff, and Managers/Supervisors. Training will increase staff ability to better utilize processes and equipment needs that will increase efficiencies.

**Management Skills:** Training will be offered to Managers/Supervisors to improve leadership skills. Subject matter will include new techniques and methods that will ensure Managers are more effective in the workplace.

**Computer Skills:** Training will be offered to Administrative Staff, Logistics Staff, Customer Service, Sales Staff, Production Staff, Technicians, and Engineers. Training topics will cover project planning and logistics software, QuickBooks, and Enterprise Resource Planning software.

**Manufacturing Skills:** Training will be offered to Production Staff, Assembly Workers, Maintenance Staff, Logistics Staff, and Supervisors/Managers. Training provided will improve employee skills to operate equipment, and implement effective manufacturing methods. Trainees will also receive cross training to increase flexibility and capacity.

**Continuous Improvement:** Training will be offered to all occupations to improve employee skill sets to meet customer service expectations. Topics will also teach staff how to reduce waste, problem solve, and improve production operations.

**Hazardous Materials:** Training will be offered to Production Staff that handle dangerous chemicals. Training will give workers the skills needed to meet federal hazardous material handling requirements. Training will ensure that safe practices are being utilized on Employer production floors.

**OSHA 10/30:** This training is a series of courses “bundled” by industry sector and occupation. 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**

Participating Employers will continue to provide new hire training, safety, and specialized training for key positions/occupations. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure/Coordinator

An administrative team of five members will enroll trainees, screen and collect all incoming training rosters, and complete data entry over the duration of this Agreement. The Director of SMC’s Workforce and Economic Development Office will oversee administration and delivery of this project.

### **High Unemployment Area**

The 51 trainees in Job Numbers 5 and 6 work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. Facilities in Los Angeles and Riverside counties qualify for HUA status under these standards. For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. SMC is requesting a wage modification for Job Numbers 5 and 6.

### **Marketing and Support Costs**

SMC continues to collaborate and market through local chambers, trade associations, and Economic Development Agencies in surrounding cities, as well as Riverside, San Bernardino, Orange, Riverside, and Ventura Counties. These organizations work with SMC to ensure a proper training plan that meets industry needs. As part of the college’s Workforce and Economic Development, SMC works with community organizations, providing counseling and workshop opportunities for small businesses in accordance with the Federal Small Business Administration.

Training vendors hired by SMC will also market SMC training programs to potential participating Employers.

SMC has dedicated staff that conduct outreach and assessments in an effort to develop customized training solutions that will meet Employer business needs. SMC Staff also provides introductory classes for Employer Representatives on a variety of subjects that demonstrate the value of employee participation in SMC training courses. SMC requests 8% in support costs to cover the recruitment of additional Employers and assessments conducted of job specific training requirements.

### **Trainer Qualifications**

SMC trainers and training vendors are considered industry experts in their field of training and have years of experience that enable them to deliver training courses. Training vendors will deliver approximately 20%-25% of training under this agreement.

### **Tuition Reimbursement**

Students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **ACTIVE PROJECTS**

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0150	\$949,579	07/25/16-07/24/18	507	507	53

Based on ETP Systems, 38,727 reimbursable hours have been tracked for potential earnings of \$949,579 (100% of approved amount). The Contractor projects final payments for the remaining 454 trainees will be submitted by April/May 2018.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0102	Santa Monica	07/01/14-06/30/16	\$749,128	\$724,473 (96%)
ET12-0295	Santa Monica	03/15/12-03/14/14	\$437,864	\$437,864 (100%)

**DEVELOPMENT SERVICES**

SMC retained Kirkpatrick Enterprise International in Valencia to assist with development of this proposal at no cost.

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

SMC retained Kirkpatrick Enterprise International to provide training in Business Skills, Continuous Improvement, Computer Skills, and Manufacturing Skills. The final amount for training has not been determined by either parties at this time. Other trainers will be identified for ETP record-keeping purposes, as they are retained. However, it will not exceed 50% of the Agreement amount.



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

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Change Management
- Communications Skills
- Customer Retention and Identifying Customer Needs
- Customer Service
- Project Management
- Scheduling and Budgeting
- Time Management

**COMMERCIAL SKILLS**

- Data Accuracy
- Distribution Systems
- Electronic Commerce, Search Engines
- Inspection and Quality Control
- Inventory Management
- Logistics and Shipping
- Paperwork requirements
- POS transactions
- Project Tracking
- Standard Work Procedures
- Transaction Control
- Transport Loading/Unloading
- Warehousing Control and Tracking

**COMPUTER SKILLS**

- CAD/CAM (Computer-Aided Manufacturing) Software
- CMM (Computer/Coordinate Measuring Machine)
- CNC (Computerized Numerical Control) Applications
- CNC (Computerized Numerical Control) Programming
- Crystal Reports, QuickBooks, Adobe, Visual Basics
- Enterprise Resource Planning (ERP)
- Logistics Software
- Microsoft (MS) Office Suite
- Project Planning Software
- Project tracking
- Warehouse & Inventory Systems

**CONTINUOUS IMPROVEMENT**

- Cycle time reduction
- ISO 9000 and ISO 14400
- Leadership Skills for Frontline Workers
- Lean Enterprises
- MRP/ERP/DRP
- Process Analysis
- Production Operations and Workflow

- Six Sigma (Green Belt)
- SMED – Single Minute Exchange of Die
- Statistical Process Control
- Teamwork and Problem Solving

#### **HAZARDOUS MATERIALS**

- Hazardous Chemical Cleaning Handling
- Hazardous Material Handling
- Hazardous Waste Handling

#### **LITERACY SKILLS**

- Basic Workplace Terminology
- Vocational English as a Second Language
- Written Communications

#### **MANAGEMENT SKILLS (Managers/Supervisors Only)**

- Decision Making and Communication
- Developing High Performance Teams
- Leading Change
- Planning, Assigning, and Follow-up
- Principals of Modern Leadership

#### **MANUFACTURING SKILLS**

- Assembly Methods and Techniques
- Bakery Controls and systems
- Cross-Training (Production Equipment/Skills)
- Equipment Operation and Maintenance
- Food Safety
- Good Manufacturing Practices
- Manufacturing Operations
- Product Handling
- Sanitation

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

- OSHA 10 (Requires 10hrs Completion)
- OSHA 30 (Requires 30hrs Completion)

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.
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**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: Santa Monica Community College District

CCG No.: ET18-0192

Reference No: 18-0091

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: ALACO

Address: 5167 G. Street

City, State, Zip: Chino, CA 91710

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 28

Total # of full-time company employees in California: 28

Company: Anita's Mexican Foods

Address: 3454 N. Mike Daley Drive

City, State, Zip: San Bernardino, CA 92407

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 45

Total # of full-time company employees worldwide: 95

Total # of full-time company employees in California: 95

Company: Authentic Foods

Address: 1850 W 169th St

City, State, Zip: Gardena, CA 90247

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 15

Total # of full-time company employees in California: 15

Company: Bal Tec

Address: 1550 Slauson Ave

City, State, Zip: Los Angeles, CA 90011

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 38

Total # of full-time company employees in California: 38

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: Santa Monica Community College District

CCG No.: ET18-0192

Reference No: 18-0091

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Company: Belmond El Encanto

Address: 800 Alvarado Pl.

City, State, Zip: Santa Barbara, CA 93103

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 42

Total # of full-time company employees worldwide: 190

Total # of full-time company employees in California: 190

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Company: Calsense

Address: 2075 Corte Del Nogal #P

City, State, Zip: Carlsbad, CA 92011

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 42

Total # of full-time company employees in California: 42

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Company: Con Tech Plastics

Address: 3200 E Birch St

City, State, Zip: Brea, CA 92821

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 16

Total # of full-time company employees worldwide: 42

Total # of full-time company employees in California: 42

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Company: Dickson Testing Company

Address: 11126 Palmer Ave

City, State, Zip: South Gate, CA 90280

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 53

Total # of full-time company employees worldwide: 180

Total # of full-time company employees in California: 180

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: Santa Monica Community College District

CCG No.: ET18-0192

Reference No: 18-0091

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Company: Egge Machine Company

Address: 11707 Slauson Ave.

City, State, Zip: Santa Fe Springs, CA 90670

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 22

Total # of full-time company employees worldwide: 31

Total # of full-time company employees in California: 31

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Company: Eliqcube

Address: 13515 Alondra Blvd

City, State, Zip: Santa Fe Springs, CA 90670

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 12

Total # of full-time company employees worldwide: 18

Total # of full-time company employees in California: 18

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Company: Grayd A Precision

Address: 13233 Florence Ave

City, State, Zip: Santa Fe Springs, CA 90670

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 18

Total # of full-time company employees in California: 18

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Company: Industrial Electronic Engineers

Address: 7723 Kester Ave

City, State, Zip: Van Nuys, CA 91405

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 45

Total # of full-time company employees in California: 45

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: Santa Monica Community College District

CCG No.: ET18-0192

Reference No: 18-0091

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Company: International Desserts

Address: 743 W Milford St

City, State, Zip: Glendale, CA 91203

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 18

Total # of full-time company employees in California: 18

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Company: La Reina

Address: 316 N. Ford Blvd.

City, State, Zip: Los Angeles, CA 90022

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 45

Total # of full-time company employees worldwide:

Total # of full-time company employees in California: 96

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Company: Left Coast

Address: 3553 N. Perris Blvd

City, State, Zip: Perris, CA 92571

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 15

Total # of full-time company employees in California: 15

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10. Company: LRC

Address: 12309 Telegraph Road

City, State, Zip: Santa Fe Springs, CA 90670

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 25

Total # of full-time company employees in California: 25

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: Santa Monica Community College District

CCG No.: ET18-0192

Reference No: 18-0091

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Company: Mission Foods - Fresno

Address: 2849 E. Edgar Ave.

City, State, Zip: Fresno, CA 93706

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 4,600

Total # of full-time company employees in California: 310

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Company: Mochi Ice Cream Company

Address: 5563 Alcoa Ave.

City, State, Zip: Vernon, CA 92614

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 86

Total # of full-time company employees in California: 86

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Company: Nicotine River

Address: 1825 Surveyor Ave Unit 103

City, State, Zip: Simi Valley, CA 93063

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

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Company: One Cycle

Address: 12 Mauchly, Ste P

City, State, Zip: Irvine, CA 92618

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 12

Total # of full-time company employees worldwide: 18

Total # of full-time company employees in California: 18

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: Santa Monica Community College District

CCG No.: ET18-0192

Reference No: 18-0091

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Company: Port Logistics Company

Address: 288 Mayo Ave.

City, State, Zip: City of Industry, CA 91789

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 320

Total # of full-time company employees worldwide: 2,800

Total # of full-time company employees in California: 1,150

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Company: RadioBeam Technologies, LLC

Address: 1717 Stewart St

City, State, Zip: Santa Monica, CA 90404

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 19

Total # of full-time company employees worldwide: 38

Total # of full-time company employees in California: 38

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Company: Ramona's Mexican Foods

Address: 13633 S. Western Ave.

City, State, Zip: Gardena, CA 90249

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 50

Total # of full-time company employees worldwide: 185

Total # of full-time company employees in California: 185

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Company: Repairtech

Address: 16134 Saticoy Street

City, State, Zip: Van Nuys, CA 91406

Collective Bargaining Agreement(s): No

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



**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: Santa Monica Community College District

CCG No.: ET18-0192

Reference No: 18-0091

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Company: Rich Products

Address: 3401 W. Segerstrom Ave.

City, State, Zip: Santa Ana, CA 92704

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 63

Total # of full-time company employees worldwide: 2,800

Total # of full-time company employees in California: 346

---

Company: Rich Products

Address: 12805 Busch Pl.

City, State, Zip: Santa Fe Springs, CA 90670

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 48

Total # of full-time company employees worldwide: 2,800

Total # of full-time company employees in California: 215

---

Company: S- Bravo Systems

Address: 2929 Vail Ave

City, State, Zip: Commerce, CA 90040

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 18

Total # of full-time company employees worldwide: 121

Total # of full-time company employees in California: 121

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Company: StrongBox

Address: 2063 Wineridge Place

City, State, Zip: Escondido, CA 92029

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 30

Total # of full-time company employees worldwide: 125

Total # of full-time company employees in California: 40

**Participating Employers in Retrainee  
Multiple Employer Contracts**

Contractor's Name: Santa Monica Community College District

CCG No.: ET18-0192

Reference No: 18-0091

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Company: Triview Glass Industries, LLC

Address: 711 S. Stimson Ave

City, State, Zip: City of Industry, CA 91745

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 62

Total # of full-time company employees worldwide: 92

Total # of full-time company employees in California: 92

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Company: Warren Packaging

Address: 1722 E. Grevillea Court

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 32

Total # of full-time company employees in California: 32

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Company: Wencor Group

Address: 42355 Rio Nedo

City, State, Zip: Temecula, CA 92590

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 52

Total # of full-time company employees worldwide: 1,600

Total # of full-time company employees in California: 262

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Company: Zonu Optical

Address: 7510 Hazeltine Ave

City, State, Zip: Van Nuys, CA 91405

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 21

Total # of full-time company employees worldwide: 27

Total # of full-time company employees in California: 27



**Training Proposal for:**

**Northern California Elevator Industry Joint Apprenticeship and Training Committee Trust Fund**

**Agreement Number: ET18-0921**

**Panel Meeting of:** March 23, 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:	Multi Counties	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Union of Elevator Constructors Local Union No. 8		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

**FUNDING DETAIL**

<b>Program Costs</b>	+	<b>Support Costs</b>	=	<b>Total ETP Funding</b>
\$696,320		\$48,280 8%		\$744,600

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate Apprentice	Commercial Skills, OSHA 10/30	300	8-210	0	\$2,002	\$22.77
				Weighted Avg: 144			
2	Retrainee Priority Rate Apprentice Veterans	Commercial Skills, OSHA 10/30	40	8-210	0	\$2,002	\$22.77
				Weighted Avg: 144			
3	Retrainee Priority Rate Journeyman	Commercial Skills, OSHA 10/30	340	8-200	0	\$188	\$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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Apprentice Elevator Constructor/Mechanic		300
Veteran Apprentice Elevator Constructor/Mechanic		40
Journeyman Elevator Constructor/Mechanic		340

**INTRODUCTION**

Established in 2004, the Northern California Elevator Industry Joint Apprenticeship and Training Committee Trust Fund (NorCal Elevator JATC) ([www.iuec8.org](http://www.iuec8.org)) serves 540 Apprentices and 841 Journeymen Elevator Constructors and Mechanics. Workers are represented by the International Union of Elevator Constructors Local 8 which covers 46 northern California counties. Employers are represented by the National Elevator Bargaining Association and the Elevator Contractors of America. Workers are employed in companies that build, install, repair, modernize, and service elevators and escalators.

This is NorCal Elevator JATC’s first ETP Agreement. The request is driven by the growing volume of new construction, and need for long-term service and repair of elevators and related equipment in northern California.

Elevator constructors specialize in installation, maintenance, modernization or repair work. Mechanics generally require greater knowledge of electronics, hydraulics, and electricity because a large part of maintenance and repair work is troubleshooting. Most elevators have computerized control systems, resulting in more complex systems and troubleshooting than in the past. In addition to elevators, workers in this trade build and repair escalators, chairlifts, moving walkways and similar equipment in buildings.

After an elevator is installed, workers must regularly maintain and service it to keep it working properly. They generally perform preventive maintenance, such as oiling and greasing moving parts, replacing worn parts, and adjusting equipment for optimal performance. They also troubleshoot and perform emergency repairs. Workers who specialize in elevator maintenance must be able to handle major repairs—for example, replacing cables, elevator doors, or machine bearings. These tasks may require the use of cutting torches or rigging equipment. Repair crews also perform major modernization and alteration work, such as replacing electric motors, hydraulic pumps, and control panels.

### **Funding Cap**

The Panel capped funding for Apprentice training at \$450,000 per program sponsor in FY 2016/17, with case-by-case flexibility. This cap does not apply to Pre-Apprentice and Journeyman training.

NorCal Elevator JATC provides training to journeymen and apprentice elevator constructors and mechanics working in 46 Northern California counties. Given the broad scope of this geographic region, and the large numbers of registered Apprentices and Journeymen to potentially be trained, a \$450,000 cap may be overly restrictive in this case. The JATC is requesting a conservative funding level for just a portion of its members to successfully earn 100% of ETP funding. Based on the current need for Apprenticeship training in Northern California, the JATC is requesting \$680,680 for its apprenticeship training program. The Panel has previously funded apprenticeship for a single program sponsor beyond the \$450,000. Based on Panel precedent and the JATC's justification, staff recommends funding for Apprentices (Job Number 1) and Veteran Apprentices (Job Number 2) totaling \$680,680.

### **Veterans Program**

NorCal Elevator JATC has committed to training 40 Veteran Apprentices (Job Number 2). The JATC participates in Helmets to Hardhats and gives veterans accelerated admission to its apprenticeship program.

### **Employer Demand**

ETP funding will assist employers handle the growing volume of work in Northern California by providing workers with the skills to meet employer demand. New construction and demand for long-term service and repair of elevators and related equipment continues to grow at a fast rate.

A sample of high rise buildings under construction in San Francisco where elevator constructors are working or will be working during the Agreement term includes: Salesforce Tower, Oceanwide Center, 181 Fremont, Park Tower, 400 Folsom Street, 706 Mission, 500 Folsom, 8 Folsom Bay Tower, 33 Tehama, Trinity Place, Exchange Place, 150 Van Ness, The Exchange on 16th, and CPMC Van Ness.

As a result of employer demand, the number of Apprentice Elevator Constructors/Mechanics has doubled in the recent three-year period. In addition to the 841 journeymen under its jurisdiction,

the demand for skilled journeymen in this trade requires that at least 137 journeymen from other areas are working in Northern California.

ETP funding will assist the JATC to train its members to install, service and maintain increasingly complex computer systems that manage elevators today. Elevator modernization is the process of upgrading the critical parts of the elevator in order to handle new technology, have better performance, improve safety, and give the aesthetics an up-to-date appeal. Typically, a modernization will affect the controller equipment, the hoist machines, and electrical wiring. Such modernization requiring new equipment and advanced technology drives the need for increased journeymen retraining.

In addition, ETP funding will help the JATC transition its training programs to include more hands-on experiences and competency testing, and expand the use of “virtual” elevator and escalator training devices. Such virtual, three-dimensional computer programs help both apprenticeship and journeymen trainees install and troubleshoot new and technologically-advanced equipment.

### **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 four 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 \$18 to \$13 per hour. In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small ( $\leq 100$  employees). This is \$22 per hour, midway between the Priority Industry standard rate (\$18) and Small Business rate (\$26).

### **PROJECT DETAILS**

All class/lab training is center-based and will be delivered at the JATC’s headquarters location in San Francisco, and at leased facilities in Martinez, Sacramento, Santa Clara and College of Marin. Trainers are qualified Journeymen with extensive technical expertise and training experience who are employed by the JATC. All instructors meet standards set by the LEAs.

### **Training Plan**

**Commercial Skills:** Training will include basic and advanced instruction in theory and practical application of skills needed by elevator constructors and mechanics, including, safety, electricity, electronics, hydraulics, troubleshooting, maintenance, service, and knowledge of various types and models of equipment.

## **Certified Safety Training**

**OSHA 10/30:** Journeymen and Apprentices may receive OSHA 10/30. This training is a series of courses “bundled” by industry sector and occupation. Completion of the training results in a certificate that expands employment opportunities. Typically, OSHA training is delivered to workers in the building trades. This training is not required as a condition of doing business in California. Note: To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full course. OSHA 10/30 is not included in the 10% limitation on safety training. The trainer-to-trainee ratio is 1:40 for OSHA 10/30.

## **Curriculum Development**

Curriculum is developed by the national elevator industry and international union. Curriculum is further customized for local area employers who are involved in journeyman and apprenticeship training plan design. Training topics are customized to include new equipment and to meet new industry standards/materials.

The JATC also uses a series of “portable” labs that are stored at each training location so training can include hands-on experiences with tools and equipment trainees will find on the job. The JATC also uses a desktop computer program that functions as a virtual elevator and virtual escalator for training purposes.

## **Electronic Recordkeeping**

Staff has 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 and Journeymen. General safety training is provided by participating employers in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

Four persons will work part time on ETP administration. The JATC staff will coordinate training scheduling. The joint committee and Los Angeles Unified School District (LAUSD) representatives also oversee training. LAUSD is one of two LEAs for the JATC. Training attendance will be kept by each instructor and passed to the JATC, which will maintain the data in the LMS. Training, demographic, and work hour data will be forwarded to LAUSD, who will insure the accuracy of the data. LAUSD will forward data to Steve Duscha who will put it into the form required by ETP and upload the data to the ETP web sites, in cooperation with LAUSD.

The system for documenting training and entering the documentation in the LMS is the same system the applicant has used successfully for many years to document training for reimbursement for related and supplemental instruction. It is also the same system used by the trust to document completion of training that leads to apprentice pay increases.

## **Marketing and Support Costs**

NorCal Elevator JATC requests, and staff supports, 8% in support costs to assist in trainee recruitment, employer outreach and assessment of employer-specific job requirements, and to promote training opportunities for Journeymen and Apprentices with signatory employers, 72% of

which are small businesses. All training is marketed through the various participating employer associations in Northern California, and through the JATC's newsletters, public service announcements, personal contacts, telephone calls, emails, and the JATC's website.

ETP-funded training will be discussed at all labor/management meetings and pertinent trade and apprenticeship events. Marketing and training evaluations are conducted via face-to-face meetings, email, and regular contact with trainees, employers, and the union. Additional feedback is received in writing from trainee class assessments and employer and union trustee reports to the JATC.

### **Tuition Reimbursement**

Any trainees enrolled in a ETP-funded program cannot be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **DEVELOPMENT SERVICES**

Steve Duscha Advisories in Sacramento assisted with development for a fee of \$10,000.

### **ADMINISTRATIVE SERVICES**

Steve Duscha Advisories and the Los Angeles Unified School District, Los Angeles, will perform administrative services for a fee not to exceed 6.5% of payment earned.

### **TRAINING VENDORS**

N/A



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

8-210 (Jobs 1 &amp; 2)

**Apprentice**

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- Introduction to Safety
- Safety during Construction and Modernization
- Safety during Maintenance and Repairs
- Alcohol and other Drugs
- Introduction to OSHA
- Hazard Communication
- Personal Protective Equipment
- Materials Handling
- Electrical Safety
- Tool Safety
- Fall Protection
- Stairways and Ladders
- Confined Spaces
- Motor Vehicle Safety
- Ergonomics
- Fire Safety
- Scaffold Safety
- Competent Person Training for Framed Scaffolds
- Training Program for Suspended Scaffolds
- Harassment and Discrimination in the Workplace
- Diversity and Success
- Care Studies
- Customer Relations
- Labor History and IUEC History
- Basic Mathematic Concepts
- Measurement
- Introduction to Installation Drawings
- Detail Drawings and Material Specifications

**Hoistway Structures:**

- Tools and Material Handling
- Rigging and Hoisting
- Crosby Fasteners
- Pit Structure
- Introduction to Guide Rails
- Installation of Guide Rails
- Machine and Sheave Installation
- Elevator Control Equipment Installation
- Car and Counterweight Assembly and Roping
- Elevator Rope and Roping
- Reropeing
- Elevator Cab Modernization, Refinishing and Floor Covering

**Electrical Fundamentals:**

- Signed Numbers and Powers of 10
- The Metric System
- Equations and Formulas
- Ratio and Proportion
- Electrical Safety
- Basic Electricity Orientation
- Understanding the Relationship between Voltage, Current and Resistance
- Basic Electrical Circuit Components
- Series and Parallel DC Resistive Circuits
- Alternating Current Theory
- Magnetism and Electromagnetism

**Electrical Theory & Application:**

- Introduction to Analog and Digital Meters
- Transformers
- DC Generator and Motor Theory
- Components of DC Motors and Generators
- Types of DC Motors and Generators
- Maintenance and Service
- AC Motors

**Installation:**

- Planning, Piping and Wiring
- Piping and Wiring the Machine Room and Hoistway
- Piping and Wiring the Car
- Start-Up Procedures
- Passenger Elevator Door and Entrance Installation
- Elevator Cab Assembly and Door Operators
- Freight Elevator Doors and Gates
- Freight Door Operators
- Dumbwaiters
- Machine Room Maintenance
- Hoistway Maintenance
- Asbestos Awareness

**Solid State:**

- Mathematics for Ohm's Law
- Basic Components and Series and Parallel Resistance
- Magnetism, Electromagnetism, AC Theory and Transformers
- Capacitors and Capacitance
- Inductors and Inductance
- Diodes
- Transistors and Thyristors
- Analog Integrated Circuits
- Digital Integrated Circuits

**Power & Logic:**

- Introduction to Circuit Tracing
- Relays and Timers

- Power and Power Control
- Logic Controls
- Constant Pressure Push Button Systems & Single Automatic Pushbutton Systems
- Collective Systems, Hydraulic Controller Theory & Troubleshooting
- Variable Voltage Selective Collective Systems

Advanced Topics in Elevators:

- Installing and Servicing the Jack
- Piping and Temporary Operation
- Basic Hydraulic Theory
- Hydraulic Elevator Maintenance
- Escalator Components and Installation Process
- Moving Walk Components and Installation Procedures
- Service Maintenance and Repair
- Residential and Limited Use/Limited Acquisition Elevators
- Residential and Limited Use/Limited Acquisition Platforms and Chair Lists
- Rack and Pinion Hoists

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

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

**Class/Lab Hours**

8-200

**Journeyman**

Trainees may receive any of the following:

**COMMERCIAL SKILLS**

- DC Generators and Motors
- Solid State Theory and Application
- Solid state Theory and Application II
- Microprocessor-Based Control
- Solid State Motor Control
- Hydraulic Theory and Troubleshooting
- Reroping
- Customer Relations
- Escalators Series
- Door Operator Series
- Meters
- Maintenance
- Rack & Pinion
- Traveling Cable
- Limited Use/Limited Acquisition Lifts
- Asbestos
- Safety Testing for Code Compliance
- Scaffolding Competent Person Course
- Welding Training
- Signaling and Rigging
- Financial Tools for the Trades
- Advanced Hydraulic Valve Operating Adjustment and Troubleshooting

- Mechanic Review Eligibility
- Arc Flash Safety in the Workplace
- Virtual Escalator
- Forklift Certification
- Aerial Lift Certification
- Introduction to Automated People Movers

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

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

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

Note: Reimbursement is capped at 210 total hours per trainee for Job Numbers 1 and 2. Reimbursement for training is capped at 200 total training hours per trainee for Job Number 3.
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**TRAINING PROPOSAL FOR**  
**7th Inning Stretch LLC dba Stockton Ports**  
**18-0524**

**Panel Meeting Date:** 03/23/2018  
**Delegation Order Date:** 02/28/2018  
**Regional Office:** Sacramento Regional Office  
**Analyst Name:** Karen Jones  
**Type of Proposal:** Single Employer (SB), Small Business Program  
**Funding Source:** SET

**FUNDING OVERVIEW**

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

<b>TOTAL ETP FUNDING:</b>		<b>\$ 7,722.00</b>	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 7,722.00	N/A	\$ 0.00	\$ 20,000.00

**APPLICANT PROFILE**

<b>Company Summary</b>	7th Inning Stretch LLC dba Stockton Ports (7th Inning) provides professional baseball entertainment and a venue for high school playoffs, concerts, charitable events and other community activities.
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<b>Industry Sector(s)</b>	Services (Other)
<b>Priority Industry</b>	No
<b>No. Employees (Applicant)</b>	<b>State:</b> 12 <b>US:</b> 12 <b>World Wide:</b> 12
<b>Turnover Rate (Applicant)</b>	10.00 %
<b>Repeat Contractor</b>	Yes
<b>High Unemployment Area</b>	Yes

<b>Union(s)</b>	N/A
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**TRAINING PROFILE**

<b>Training Objective(s)</b>	7th Inning aims to upgrade workforce skills to remain competitive in the sports entertainment industry. Training will focus on the Company's new website and software system, PropertyPort.
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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	12	\$ 22.00	27	\$ 594	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	1	\$ 22.00	27	\$ 594	8 - 60

# PROPOSED TRAINING PROJECT DETAILS

## 1. Company Background

Founded in 1941 and located in Stockton, 7th Inning owns and operates the Stockton Ports, a Class A baseball farm team affiliated with the Oakland Athletics Major League Baseball franchise. The baseball team plays at the Banner Island Ballpark in Stockton.

## 2. Current Training Project Details

<b>Purpose of Training</b>	<p>This will be 7<sup>th</sup> Inning's second ETP Agreement and the second in the last five years. Under the previous Agreement, 7th Inning focused training on improving customer service and marketing skills. There will be no duplication of training for these trainees who participated in the prior contract.</p> <p>Training under this Agreement will focus on a newly launched website to ensure staff can properly navigate the system and troubleshoot errors. 7th Inning's website is designed to increase the effectiveness of marketing campaigns and stream-line the ticketing process.</p> <p>Training will also focus on PropertyPort, a marketing software system designed to increase sponsorship and sales. PropertyPort will be incorporated into 7th Inning's marketing plan in March of 2018. Training will be required by Corporate Sales Staff to ensure proficiency in the new system.</p>
<b>Training Infrastructure and Administrative Plan</b>	<p>The Company's current training budget is approximately \$10,000 per year. Training programs include new hire orientation, safety training, and computer skills training. ETP funds will not displace the existing financial commitment to training.</p> <p>7th Inning's General Manager will oversee the training plan and will work with department leads on implementation. The General Manager will coordinate training and collect rosters. In addition, the Company has retained the services of a third-party administrative subcontractor to assist with administrative requirements. A training plan is in place, and training will begin upon approval.</p>
<b>Marketing Plan (MEC Only)</b>	Not Applicable
<b>Support Cost Description (MEC Only)</b>	Not Applicable
<b>Substantial Contribution Description</b>	N/A

## PROPOSED TRAINING PROJECT DETAILS

### 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
<b>Summary</b>	
All occupations identified in Attachment 1 will receive training in Business Skills, Computer Skills and Continuous Improvement in topics listed under Attachment 2.	

### 4. Additional Company or Training Project Details

Provided here is additional information relative to the proposed Training Project.

#### Retrainee - Job Creation

7th Inning projects client base growth of 5% over the next two years due to the launch of the new Website and the new marketing software system. To support this expansion, the Company is committed to hiring a new Corporate Sales Staff to support this expansion. The date-of-hire for the trainee will be within the three-month period before contract approval or within the term-of-contract. This trainee will be hired into a "net new job" as a condition of contract.

#### 4.1 Program Waivers

N/A

#### 4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
<b>Development</b>	Strategic Business Solutions, LLC	Visalia	N/A
<b>Administrative</b>	Strategic Business Solutions, LLC	Visalia	Not to exceed 10.00% of payment earned
<b>Training</b>	None selected to date	N/A	N/A



## PROPOSED TRAINING PROJECT DETAILS

### 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
ET17-0187	Stockton, CA	08/12/2016– 08/11/2017	\$11,880	\$7,662	65%
<b>Notes</b>	7 <sup>th</sup> Inning's performance was due to a shift in priorities. The Company shifted focus to several community projects and reduced training to focus on these projects. Under this proposal, the General Manager and staff are dedicated to the success of this project. The current proposal has been "right-sized" consistent with prior earnings and training hours have been reduced to ensure success.				

### 4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

## Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Corporate Sales and Marketing
	Facility Management Action Plan
	Project Management
	Ticketing Strategies
	WebSite Development
Computer Skills (Standard)	Glitnir Ticketing Software Training Upgrade
	Microsoft Suite
	Property Port CSM Software Upgrade training
	Website Navigation and Utilization
Continuous Improvement Skills	Leadership Training II
	Lean Processes
	Team Building II

**DELEGATION ORDER**



**Training Proposal for:  
Alpha EMS Corporation**

**Agreement Number: ET18-0179**

**Approval Date:** March 1, 2018

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

**Analyst:** C. Hoover

**PROJECT PROFILE**

Contract Attributes:	Priority Rate Retrainee	Industry Sector(s):	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: 126	U.S.: 129	Worldwide: 129
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	18%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$49,140		\$0	\$0		\$49,140

In-Kind Contribution:	100% of Total ETP Funding Required	\$68,400
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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, Cont. Imp., HazMat, Mfg. Skills, Literacy Skills	39	8-200	0	\$1,260	\$18.22
				Weighted Avg: 70			

**Minimum Wage by County:** \$18.22 for Alameda County.

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

**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
Up to \$2.50 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administration Staff	\$15.72 - \$24.00	5
Production & Testing Staff	\$15.72 - \$24.00	11
Management Staff	\$16.00 - \$38.00	7
Engineering Staff	\$19.00 - \$48.00	16

**INTRODUCTION**

Founded in 2003, Alpha EMS Corporation (Alpha EMS) manufactures printed circuit board (PCB) prototyping and assembly production. The Company offers a broad range of cross-functional computer components and services including design layout, material purchasing, assembly and warehousing. Alpha EMS also conducts ongoing PCB assembly production services for a variety of industries including medical, high-end industrial, industrial personal computing, military and mobile/wireless. Customers include Fusion Space IO, Flextronics, San Francisco Circuit, Verizon Wireless and the United States Air Force.

Alpha EMS is independently owned and operated with one facility in Fremont where training will be delivered.

This is Alpha EMS' second ETP Agreement, the second in five years. The prior Agreement helped the Company expand its training to the non-manufacturing staff. Subsequently, Alpha EMS was able to decrease its rework rate by a 15%.

Due to competition from overseas companies, Alpha EMS must drive internal per-unit costs down by increasing its efficiency and throughput. Therefore, the Company is implementing cross-training of its manufacturing techniques to work in specific functional units or cells. This is a Lean manufacturing subset of Just-In-Time methodology. In this proposal, ETP funds will help Alpha EMS become a stronger team with the ability to solve problems and enhance productivity.

Currently, Alpha EMS has several manufacturing lines used during both prototype and production runs. The Company has been actively experimenting with cell manufacturing techniques, while measuring efficiency. Each cell has a particular set of expertise. As part of this process, Alpha EMS must develop and train more staff to respond to high demand for process checks.

The Company's client base is necessitating Alpha EMS expand its certifications beyond International Organization for Standardization (ISO) 9001 (Quality Management), International Traffic in Arms Regulation (ITAR) and ISO 14001 (Environmental) to include AS9100 (Aerospace) and ISO 13485 (Medical). For example, ETP-funded training will lead to the Company's AS9100 revision D certification and RoHS (Hazardous Materials) recertification. Though some of the training curriculum in this project is the same as in the prior Agreement, some training wasn't delivered and some topics have been updated. Trainees who participated in the prior training plan will not repeat any courses.

## **PROJECT DETAILS**

### **Training Plan**

Training will be delivered by in-house experts and vendors via Class/Lab and E-Learning as outlined below:

**Business Skills:** Training will be offered to all occupations in Marketing Strategy & Implementation, Customer Service & Retention and Project Management: Team & Strategic Process.

**Commercial Skills:** Training will be offered to the Engineering Staff in Engineered Component Design Placement/Optimization

**Computer Skills:** Training will be offered to Administration, Production & Test and Management Staff. Courses include Manufacturing Resource Planning/Enterprise Resource Planning Training and AQTRAX Training (Production Software).

**Manufacturing Skills:** Training will be offered to Production & Test and Engineering Staff. Training courses include Initial Production Check (IPC) Manufacturing Practices, Production Workflow, Production Equipment Training, and Soldering and Material Best Practices.

**Continuous Improvement:** Training will be offered to all occupations in in IPC Quality & Continuous Improvement Requirements, Basic Electronics Best Practices, ISO Guidelines and Implementation and ITAR Compliance Best Practices.

**Hazardous Materials:** Training will be offered to all occupations in Hazardous Materials Handling and Disposal, so the Company can successfully attain its RoHS (Lead-Free) recertification.

**Literacy Skills:** Training will be offered to Production & Test and Management Staff in English as a Second Language - Job Specific Language Skills.

### **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. The Company spends approximately \$75,000 annually on training. Alpha EMS currently provides mandatory training in New-Hire Orientation, Sexual Harassment Prevention, and Health and Safety Requirements.

Safety training is provided in accordance with all pertinent requirements under state and federal law.

### ➤ Training Infrastructure

The Director of Quality will lead this training effort. A Human Resources (HR) Administrator will also oversee the training project and manage scheduling, delivery and documentation of training. A Document Control employee will provide administrative support as well.

The Company has retained Assured Incentives Group to assist with administration.

### **Impact/Outcome**

ETP funds will help the Company update its ISO certifications in AS9100 (Aerospace); ISO 13485 (Medical) and ISO 14001 (Environmental). ETP training will also lead to the Company's AS9100 revision D certification and RoHS recertification.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET15-0437	Fremont	4/15/15 – 4/14/17	\$38,880	\$38,880	(100%)

### **DEVELOPMENT SERVICES**

Assured Incentives Group (AIG) in San Clemente assisted with development for a flat fee of \$4,900.

### **ADMINISTRATIVE SERVICES**

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

### **TRAINING VENDORS**

Kate Mayer (EPTAC Corporation Training Center) of Santa Clara will provide IPC Manufacturing Practices (Manufacturing Skills) training for a fee of \$7,500.

Alicia Forbrich (San Jose Learning Center) of San Jose will provide ESL (Literacy Skills) training for a fee of \$3,350.

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

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

8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Marketing Strategy & Implementation
- Customer Service & Retention
- Project Management: Team & Strategic Process

**COMMERCIAL SKILLS**

- Engineered Component Design Placement/Optimization

**COMPUTER SKILLS**

- MRP/ERP Training
- AQTRAX Training (Production Software)

**CONTINUOUS IMPROVEMENT**

- Initial Production Check (IPC):
  - Quality & Continuous Improvement Requirements
- Basic Electronics Best Practices
- ISO 13485 and AS9100D Guidelines and Implementation
- International Traffic in Arms Regulation - Compliance Best Practices

**HAZARDOUS MATERIALS**

- Hazardous Materials Handling and Disposal

**MANUFACTURING SKILLS**

- IPC Manufacturing Practices
- Production Workflow
- Production Equipment Training
- Soldering and Material Best Practices

**LITERACY SKILLS**

- ESL – Job Specific Language Skills

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  
ATEL Communications, Inc.  
18-0576**

**Panel Meeting Date:** 03/23/2018  
**Regional Office:** San Diego Regional Office  
**Analyst Name:** Kellen Hernandez  
**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.

<b>TOTAL ETP FUNDING: \$19,760.00</b>			
<b>Program &amp; Admin Cost</b>	<b>Support Cost (\$)</b>	<b>Substantial Contribution (\$)</b>	<b>Total In-Kind</b>
\$19,760.00	N/A	\$0.00	\$45,800.00

**APPLICANT PROFILE**

<b>Company Summary</b>	ATEL Communications, Inc., (ATEL), installs, maintains, manages and upgrades telecommunications equipment and software systems.
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<b>Industry Sector(s)</b>	Information
<b>Priority Industry</b>	Yes
<b>No. Employees (Applicant)</b>	<b>State:</b> 20 <b>US:</b> 20 <b>World Wide:</b> 20
<b>Turnover Rate (Applicant)</b>	0.00 %
<b>Repeat Contractor</b>	No
<b>High Unemployment Area</b>	No
<b>Union(s)</b>	N/A



## **TRAINING PROFILE**

<b>Training Objective(s)</b>	Training will help staff to manage the rapid changes in telecommunications equipment and software systems and understand how new products effect ATEL's business model.  Training will increase the staff's productivity and efficiency during customer interactions, and to remain competitive with larger firms.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

<b>#</b>	<b>Group Characteristics</b>	<b># Of Trainees</b>	<b>Reimbursement Rate</b>	<b>Weighted Avg. Hours</b>	<b>Cost Per Trainee</b>	<b>Min-Max Hours</b>
1	Retrainee	18	\$26.00	40	\$1,040	8 - 60
1	Owner, Retrainee	1	\$ 26.00	40	\$ 1,040	8 - 60

# PROPOSED TRAINING PROJECT DETAILS

## 1. Company Background

Founded in 1980 and headquartered in San Diego, ATEL provides services focused on Private Branch Exchange (PBX) telephone systems, Voice Over Internet Protocol (VoIP) phone service, managed IT support, cyber and CCTV security system installation and network cabling services. The Company also provides telecommunications products and services to various business sectors with a focus on the hospitality, public sector, healthcare, manufacturing and retail markets.

This will be ATEL's first ETP Agreement.

## 2. Current Training Project Details

<b>Purpose of Training</b>	<p>ATEL is focused on growing its business by increasing productivity and efficiency. This will help the Company increase sales and market share, and remain competitive. ETP funds will help ATEL invest in new skills training for Technical and Administrative Staff. This investment in training is necessary because new telecommunications products are constantly introduced into the market place. This creates a need to train staff to sell, install, maintain and manage new hardware and software products. Technical Staff will receive training in Product/Service Knowledge to provide product support to customers. Administrative Staff will receive training in Business Development/Sales to recommend the best product set to meet client needs.</p> <p>In addition, the Company's goal to increase productivity and efficiency is directly related to ATEL's ability to keep up with technological advances and install, maintain, manage and upgrade telecommunications equipment and software systems. The Company also plans to deliver Commercial Skills training in network cabling, VoIP installation and cyber security managed services.</p>
<b>Training Infrastructure and Administrative Plan</b>	<p>ATEL's Controller will schedule training with department managers and train staff how to document training correctly. Training will be delivered by in-house experts. The Controller will collect attendance rosters and verify they have been completed correctly. ATEL has retained Training Funding Source (TFS) to support administration. TFS will enroll trainees and provide reports to Controller and Owner. ATEL is ready to begin training upon approval and based on training projections. The Company is confident it can deliver the necessary training within the contract term.</p>

## PROPOSED TRAINING PROJECT DETAILS

<b>Substantial Contribution Description</b>	N/A
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### 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
<b>Summary</b>	
All occupations will receive training in Business, Commercial and Computer Skills topics listed under Attachment 2.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
<b>Summary</b>	
All occupations will receive training in Computer Skills topics listed under Attachment 2.	

### 4. Additional Company or Training Project Details

N/A

#### 4.1 Program Waivers

N/A

#### 4.2 Subcontractor Summary

ATEL has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$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

N/A

#### 4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide details on the training, curriculum and 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>	
<b>Training Type (Level)</b>	<b>Planned Course Offerings</b>	
Business Skills	Account Management	
	Accounting/Billing	
	Business Development/Sales	
	Client Relationships	
	Communication	
	Contracts	
	Financial Management	
	Goal Setting	
	Inventory Control	
	Leadership	
	Negotiation	
	Product/Service Knowledge	
	Project Management	
	Teamwork	
Time Management		
Commercial Skills (Standard)	Cabling	
	Cloud Services	
	Cyber Security	
	Digital Marketing, Social Media	
	Telecommunications	
	Video Conference	
	Video Surveillance	
	Voice Over Internet Protocol	
	Voice Service Assurance	
Computer Skills (Standard)	Cloud Offering	
	Continuum Remote Monitoring & Management	
	Microsoft 365, Office	
	NEC Studio, 9100, 9500	
	Network Security Technologies (Defender)	
	QuickBooks	

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
<b>Training Type (Level)</b>	<b>Planned Course Offerings</b>	<b>Standard Hours</b>
Computer Skills	All Things Service	4.50
	Build your Tigerpaw Environment	2.00
	Getting the Most Out of Tigerpaw Matrix	0.75
	Invoice with Ease	2.00
	Let Imports do the Heavy Lifting	0.75
	Managing Accounts and Contracts	1.00

## Attachment 2 - Training Delivery and Curriculum Listing

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

Managing Contracts	2.00
Navigating Sales Cycle	1.75
Purchasing in Tigerpaw	1.50
Service Order Fund	1.75
Tigerpaw Academy	0.75
Tigerpaw Basics	2.00
Understanding the Price Book	1.75



**TRAINING PROPOSAL FOR  
Clean Solar, Inc.  
18-0605**

**Panel Meeting Date:** 03/23/2018  
**Regional Office:** San Francisco Bay Area Regional Office  
**Analyst Name:** Samantha Wang  
**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.

<b>TOTAL ETP FUNDING:</b>		<b>\$ 32,604.00</b>	
<b>Program &amp; Admin Cost</b>	<b>Support Cost (\$)</b>	<b>Substantial Contribution (\$)</b>	<b>Total In-Kind</b>
\$ 32,604.00	N/A	\$ 0.00	\$ 55,000.00

**APPLICANT PROFILE**

<b>Company Summary</b>	Clean Solar, Inc., ( <a href="http://www.cleansolar.com/">http://www.cleansolar.com/</a> ) (Clean Solar) is a solar installation company that sells and installs custom solar energy solutions for residential and commercial customers.
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<b>Industry Sector(s)</b>	Utilities
<b>Priority Industry</b>	Yes
<b>No. Employees (Applicant)</b>	<b>State:</b> 43 <b>US:</b> 43 <b>World Wide:</b> 43
<b>Turnover Rate (Applicant)</b>	13.60 %
<b>Repeat Contractor</b>	No
<b>High Unemployment Area</b>	No
<b>Union(s)</b>	No

## **TRAINING PROFILE**

<b>Training Objective(s)</b>	Clean Solar will use ETP funds to train staff on product knowledge, communication, customer service, and technical skills.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

<b>#</b>	<b>Group Characteristics</b>	<b># Of Trainees</b>	<b>Reimbursement Rate</b>	<b>Weighted Avg. Hours</b>	<b>Cost Per Trainee</b>	<b>Min-Max Hours</b>
1	Retrainee	38	\$ 26.00	33	\$ 858	8 - 60

# PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

## 1. Company Background

Founded in 2007 and headquartered in San Jose, Clean Solar designs and installs solar battery back-up installations for residential and commercial properties. It utilizes products and technology from suppliers such as Enphase, SunPower, and Tesla. The Company customizes solutions based on customer's energy needs.

### Customer Base

Some of Clean Solar's customers include Facebook, Oracle, Samsung, Levi Stadium, Cisco and residential property owners.

## 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

Businesses in the energy industry are increasingly competitive, requiring Clean Solar to deliver quality products at a lower price. To remain competitive, the Company must train all employees to increase business productivity, efficiency, and quality. Clean Solar must streamline all internal installation processes to reduce waste, errors, and costs.

Clean Solar will train the sales team, Customer Support, marketing team, and department Managers on the Sandler Selling System. Staff will learn to effectively communicate with customers and with the team to eliminate service process errors. All staff will also be trained on Salesforce software. This software is Clean Solar's Customer Relations Management (CRM) System which will assist staff to better manage client's data, perform sales services, and schedule any service needs.

Training will be provided in suppliers products as follow:

- Sunpower – The Company's product uses a unique technology to make the solar panels operate efficiently. Since the solar module and cell production are quite detailed in its functionalities, Sales Representatives will have Equipment Operation and Maintenance training to focus on the installation of the racking system.
- Enphase - This company is rolling out a new inverter that will change solar inversion. An inverter is the component in the system that takes the direct current (DC) power generated by solar panels and converts it to alternating



## PROPOSED TRAINING PROJECT DETAILS

	<p>current (AC) power that is used by the electrical outlets in the home or business and compatible with the power grid. All staff will learn its updated features to better serve their customers.</p> <ul style="list-style-type: none"> <li>• Tesla - The solar industry is changing to a battery-based system and in 5 years, Tesla will not sell a solar system without a battery attached. All staff will receive training on the battery-based system to understand its installation, qualities, warranties, and code requirements.</li> </ul>
<b>Training Infrastructure and Administrative Plan</b>	<p>Class/Lab, E-Learning, and Computer Based Training (CBT) will be delivered at Clean Solar's San Jose facility by qualified internal staff and trainers from Sandler Training. Sandler Training will conduct all sales, marketing, and business development training. Clean Solar will train staff on safety, software, equipment, service, and installation training. Since Sandler Training is located in Irvine, trainees will receive some of the training via E-Learning and CBT.</p> <p>The Office Manager will oversee all ETP training. This includes meeting with the ETP Analyst and monitoring and managing the entire contract. In addition, an internal training team will assist the Office Manager to ensure all employees receive the necessary skills, and ETP records are maintained. The Company has also retained Sandler Training to assist with administrative duties.</p>
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A
<b>Substantial Contribution Description</b>	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
<b>Summary</b>	
<p>Training includes Business, Computer, Continuous Improvement, and Manufacturing Skills. Each training topic will ensure staff is knowledgeable of each equipment procedures and sales techniques to better serve their customers.</p>	

## PROPOSED TRAINING PROJECT DETAILS

<b>Delivery Method/Level</b>	<b>E-Learning - Computer Based Training (CBT)</b>
<b>Summary</b>	
Training includes Business Skills. In addition to the remote classes, all staff are required to receive some online courses through a software for certification of completion. This will ensure that staff have the complete knowledge on the equipment and sales procedures. CBT hours are capped at 50% of total training hours per-trainee.	

<b>Delivery Method/Level</b>	<b>E-Learning - Instructor Led/Distance Learning</b>
<b>Summary</b>	
Training includes Business Skills. E- Learning will allow the flexibility for some trainees to attend training remotely as they work in the field on a consistent basis. In addition, Sandler Training provides some of the training in their Irvine office. Each training from this vendor will be livestreamed for all trainees that are not able to attend the live training.	

#### 4. Additional Company or Training Project Details

##### 4.1 Program Waivers

No waivers have been applied to this proposed project.

##### 4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor(s).

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
<b>Development</b>	Sandler Training	Irvine	N/A
<b>Administrative</b>	Sandler Training	Irvine	10% of Contract Agreement earnings
<b>Training</b>	Sandler Training	Irvine	\$4,500

##### 4.3 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
	Conflict Management
	Contract Negotiations
	Customer Service
	Developing Proposals
	Developing Referrals
	Enterprise Selling Skills
	Inner Office Communication
	Inventory Control
	Negotiation Skills
	Prospecting
	Sales Manager Development
	Sales Mastery
	Time Management
Computer Skills (Standard)	Computerized Scheduling
	Cost Accounting
	Creating accounts
	Excel
	Lead Management
	Material Resource Planning
	Outlook
	Power Point
	Project Manager
	Reports
	Sales Forecasting/Salesforce
	Word
Continuous Improvement Skills	5S
	Management Coaching
	Problem Solving
Manufacturing Skills (ME) (Standard)	Cross-Training in Production Skills
	Equipment Operation and Maintenance
	Quality Systems Assurance
	Reliability Processes
	Supplier Product Training - SunPower, Enphase, Tesla
<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication Skills
	Conflict Management
	Customer Relations

## Attachment 2 - Training Delivery and Curriculum Listing

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

	Customer Service	
	Developing Proposals	
	Developing Referrals	
	Inventory Control	
	Negotiation Skills	
	Prospecting	
	Sales Foundations	
	Sales Manager Development	
	Sales Mastery	
<b><i>Delivery Method /Level</i></b>	<b><i>E-Learning – Computer Based Training (CBT)</i></b>	
<b>Training Type (Level)</b>	<b>Planned Course Offerings</b>	<b>Standard Hours</b>
Business Skills	Basics of Manufacturing Costs	1.00
	Conflict Resolution Principles	1.00
	Customer Service	1.50
	Effective Meetings	1.00
	Enterprise Selling Skills	1.50
	Essentials of Communication	1.00
	Sales Foundations	2.00
	Sales Manager Development	1.50
	Sales Mastery	2.00



**Retrainee - Job Creation  
Training Proposal for:  
Coastal Payroll Services, Inc.**

**Small Business**

**ET18-0199**

**Approval Date:** March 12, 2018

**ETP Regional Office:** San Diego

**Analyst:** M. Ibarra

**CONTRACTOR**

- Type of Industry: Financial Services  
Services  
Priority Industry:  Yes  No
- Number of Full-Time Employees  
California: 42  
Worldwide: 42  
Number to be trained: 52  
Owner  Yes  No
- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET):  Yes  No
- High Unemployment Area (HUA):  Yes  No
- Turnover Rate: 2%
- Repeat Contractor:  Yes  No

**FUNDING**

- Requested Amount: \$46,112
- In-Kind Contribution: \$55,500

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	42	8 - 60	0	\$836	\$17.03
				Weighted Avg: 38			
2	Retrainee SB <100 Job Creation Initiative	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	10	8 - 60	0	\$1,100	*\$14.19
				Weighted Avg: 50			

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

- Reimbursement Rate: Job #1 & 2: \$22 SB Non-Priority
- County(ies): San Diego
- Occupations to be Trained: Administrative Staff, Sales Staff, Operations Staff, Supervisor/Manager, and Owner
- Union Representation:  Yes  
 No
- Health Benefits: Job #1 & 2: \$1.76 per hour

**SUBCONTRACTORS**

- Development Services: Training Funding Source (TFS) in Seal Beach will assist with the development of this proposal for a flat fee of \$2,500.
- Administrative Services: TFS will also assist with the administration for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 2007 and located in San Diego, Coastal Payroll Services, Inc. (Coastal Payroll) ([www.coastalpayroll.com](http://www.coastalpayroll.com)) is a small business that started with a mission to provide employers with a local alternative to national payroll providers in the San Diego area. Today, Coastal Payroll is a Human Capital Management service provider, providing a comprehensive set of services related to people resource management, specifically in human resources; benefits

administration; time and attendance for over a thousand small to medium-size businesses throughout Southern California.

Coastal Payroll's primary business goal is to provide resources, technology, and tools to ease the burden of workforce management. Company representatives state that this burden is increasing, with increased regulations and access to instant information through technology. To address these challenges, Coastal Payroll must constantly innovate and grow its service and technological capabilities.

As a result, Coastal Payroll has committed to focus on exemplary customer service by providing high quality performance through increased technology access. To this end, the Company recently transitioned to a full-suite Human Capital Management solutions, iSolved software system. This system will allow the Company to provide clients a myriad of services in payroll; employee recruiting and onboarding; human resources; benefits administration; and time and attendance, all in one platform.

Training will allow the Company to support the new software system and processes to successfully transition and utilize the system and keep pace with new and changing industry regulations. ETP funding will enable Coastal Payroll to deliver comprehensive training that incorporates various business, commercial, computer, and continuous improvement skills to meet business goals. This training will allow the Company to provide new or upgrade skills to its workers and increase production efficiencies.

### **Retrainee - Job Creation**

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

Coastal Payroll acquired 300 new clients in 2017 and due to the expansion of existing business capacity to its current services, it expects similar growth in 2018. As such, the Company has committed to hire 10 new workers: 6 Operations Staff, 2 Sales Staff, and 2 Supervisor/Manager. These 10 net, new workers will be included in the proposed training plan (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

### **Training Plan**

Coastal Payroll recently acquired a new Director of Training who will be responsible for scheduling, implementing, and overseeing training. Training will commence after contract approval and will be delivered by in-house trainers and potential outside vendors in the following skills:

**Business Skills** – Training will be provided to all occupations. Training topics include Coaching, Communication, Customer Service, Sales, Leadership, Project Management, and Marketing & Business Development skills. Training will provide trainees with skills necessary to effectively interact with clients.

**Commercial Skills** – Training will be provided to all occupations to understand new and changing regulations and requirements specific to the industry. Training in Employee Benefits, Payroll, Tax, Wage and Hour, Employment Law regulations will enable workers to stay current with regulatory changes, and keep clients informed. Course topics also include Bank Reconciliations, Bank Wiring and Reporting Requirements.

**Computer Skills** – Training will be provided to all occupations. A significant amount of training will be provided in the new iSolved software system to enable workers to fully utilize its capabilities and functions. Training will also include several software system application skills specific to 401k reporting, accounting, activity metrics and development & tracking, applicant tracking, background checks, expense reimbursement, garnishment processing, marketing, payroll processing, and website management.

**Continuous Improvement** – Training will be provided to all staff. Course topics include Change Management, Process/Quality Improvement, Problem Solving Skills, and Teambuilding. Training will allow workers to solve problems presented by customers as well as provide a high level of individualized support based on customer needs.

### **RECOMMENDATION**

Staff recommends approval of this proposal.



**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8 – 60 Trainees may receive any of the following:

**BUSINESS SKILLS**

- + Coaching
- + Client Relations
- + Client Training
- + Communication
- + Customer Service
- + Email & Phone Etiquette
- + Leadership Skills
- + Sales Skills
- + Marketing & Business Development
- + Meeting Structure and Leadership
- + Planning Skills
- + Project Management
- + Seminar Development and Leadership
- + Time Management/Multi-Tasking Skills

**COMMERCIAL SKILLS**

- + Bank Wiring Requirements
- + Bank Reconciliations
- + Employee Benefits Regulations (COBRA, ERISA, ACA, HIPAA)
- + Payroll Regulations
- + Reporting Requirements
- + Tax Regulations
- + Wage and Hour Regulations
- + Employment Law Regulations

**COMPUTER SKILLS**

- + 401k Reporting
- + Accounting Software Interfaces
- + Activity Metrics Development and Tracking
- + Affordable Care Act
- + Applicant Tracking
- + Background Checks
- + Certified Payroll
- + Conversions & Account Management
- + Custom Export Builds and Interfaces
- + Customer Relationship Management ("CRM")
- + EDI Benefit Carrier Feeds
- + Employee Paycheck Components and Calculation for Customers
- + Employee Benefits for Customers
- + Employee Onboarding for Customers
- + End of Day Processing
- + Expense Reimbursement
- + Extraction, Manipulation, and Use of Stored CRM Data
- + Garnishment Processing
- + HR Support Center "HR Answerlink" for Customers

- ✚ HRIS - Human Resources Information System
- ✚ Implementations - New Clients
- ✚ iSolved HCM Solution/Infinisource
- ✚ Linked In
- ✚ Marketing Tools
- ✚ Microsoft Office
- ✚ Microsoft Sharepoint
- ✚ Payroll Processing Best Practices
- ✚ iSolved Tax
- ✚ Performance Management
- ✚ Quarter End and Year End Processing
- ✚ Report Writer
- ✚ SalesForce
- ✚ Security Awareness
- ✚ Smartsheet
- ✚ Tax Filing and Compliance
- ✚ Tax Variance Corrections
- ✚ Time and Attendance Systems for Customers
- ✚ Time Clock Hardware for Customers
- ✚ W2s and 1099s
- ✚ Website Management
- ✚ Worker's Compensation Insurance for Customers
- ✚ ZenDesk

#### **CONTINUOUS IMPROVEMENT**

- ✚ Business Planning and Development
- ✚ Change Management
- ✚ Key Performance Indicator Development and Monitoring
- ✚ Performance Improvement
- ✚ Process/Quality Improvement
- ✚ Problem Solving Skills
- ✚ Teambuilding

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.

**DELEGATION ORDER**



**Retrainee - Job Creation  
Training Proposal for:  
Freetech Plastics, Inc.**

**Small Business**

**ET18-0195**

**Approval Date:** March 12, 2018

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

**Analyst:** R. Jackson

**CONTRACTOR**

- Type of Industry: Manufacturing
  
  - Number of Full-Time Employees
    - California: 40
    - Worldwide: 40
    - Number to be trained: 36
  
  - 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: \$37,960
- In-Kind Contribution: \$35,000

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills Computer Skills Cont. Improv. Literacy Skills Mgmt. Skills Mfg. Skills PL- Mfg. Skills	32	8-60  Weighted Avg: 40	0	\$1,040	\$18.22
2	Retrainee SB <100 Priority Rate Job Creation Initiative	Business Skills Computer Skills Cont. Improv. Literacy Skills Mgmt. Skills Mfg. Skills PL- Mfg. Skills	4	8-60  Weighted Avg: 45	0	\$1,170	\$15.18

- Reimbursement Rate: Job #1 & 2: \$26 SB Priority
- County: Alameda
- Occupations to be Trained: CNC Operators, Assemblers, Fabricators, Formers, Shipping and Receiving, Supervisors, Managers, Administrative Staff
- Union Representation:  Yes  
 No
- Health Benefits: Job #1: \$2.50 per hour

**SUBCONTRACTORS**

- Development Services: Freotech Plastics, Inc, has retained AJ Helm Consulting in San Jose, CA, to assist with development of this proposal for a flat fee of \$640.
- Administrative Services: Freotech Plastics, Inc, has retained AJ Helm Consulting in San Jose, CA, to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.
- Training Vendors: None.

**OVERVIEW**

Founded 1978, Freotech Plastics, Inc, (Freotech) ([www.freotechplastics.com](http://www.freotechplastics.com)) designs, engineers, and manufactures pressure, twinsheet, and vacuum thermofomed plastic parts for

the Automotive, Medical, Scientific, Telecommunications and Electronics markets. Products also include custom specialized tools needed to manufacture and trim parts. Freetech makes a variety of products including aerospace interior parts, telecom switches, medical enclosures, automotive charging station parts, and packaging.

Training will help the Company's transition to a Lean Manufacturing model in an effort to boost efficiency. The Company plans to implement a new Enterprise Content Management system (Laserfiche software) to support quality improvement initiatives. The upgraded systems are intended to improve the management of customer orders. Advancing standardized Lean processes and increasing the ability to generate detailed metrics in internal reports will help the Company meet goals to reduce costs, remain competitive and improve customer service. Training will upgrade workforce skills to reinforce career advancement opportunities within the Company.

Training will be delivered at the Company's sole location in Fremont to 32 current employees and 4 Job Creation retrainees.

### **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. Freetech has committed to hiring 4 new employees (Job Number 2). Trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

The Company completed the installation of a 2000 square foot manufacturing space and plans to add approximately 500 square feet by the end of first quarter 2019. With ETP funds, Freetech plans to train staff on recently purchased production equipment and Enterprise Resource Planning software (estimated value of \$500,000).

### **Training Plan**

Classroom and productive lab training (maximum 24 hours) below will be delivered by in-house trainers starting in March 2018.

The majority of the proposed training to be delivered is in Manufacturing and Continuous Improvement skills.

**Business Skills:** This training will be offered companywide to improve the management of materials, improve communications, and make quality improvements. Topics such as Inventory Control, Customer Service and Quality Control will be offered.

**Literacy Skills:** This training will be offered to identified staff from across production related occupations (CNC Operator, Assemblers, Fabricators, Formers, Shipping and Receiving) not to exceed 45% of total training hours (per trainee). The training is needed to improve vocational English skills. Production Staff must be able to read forms and understand work instructions to complete tasks and more fully participate as team members.

**Management Skills:** This training will be offered to Managers and Supervisors only. This training is designed to enhance Supervisory based leadership and upgrade technical skills to attain greater expertise and stronger teamwork results. Topics such as Basic Leadership, Quality Management Systems, and Supplier Approval will be provided.

**Computer Skills:** This training will be offered to all occupations. The new Enterprise Content Manager system, Laserfiche, involves all departments. Computer skills are needed to upgrade skills that help improve quality controls and increase efficiencies. The Company's new Lean Manufacturing approach includes new computer software that will help the Company better meet

market demands. Topics such as Vista, Microsoft Office Suite, and Laserfiche Document Management Software will be offered.

**Manufacturing Skills:** This training will be offered to CNC Operators, Assemblers, Fabricators, Managers and Supervisors. New Lean procedures are being introduced related to production processes, product knowledge, assembly, and best manufacturing practices. Training is needed to ensure employees understand new standardized procedures designed to increase productivity (speed to delivery) and reduce waste. If approved, topics such as Cross Training, Cosmetic Finishing and Lean Manufacturing will be offered.

**Continuous Improvement:** This training will be offered companywide to upgrade skills to support quality improvement initiatives and advance employee development. The Company aims to promote from within and has identified leadership and technical skills considered critical for empowering frontline workers with necessary tools that reinforce Freetech's high performance expectations. Training topics such as Team Building, Production Operations, and Leadership will be offered.

### **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. An estimated 35 production related occupation trainees (CNC Operators, Assemblers, Fabricators, Formers, Supervisors and Managers) will receive PL from experienced operators to operate equipment and produce custom parts.

Trainees will receive up to 24 hours of PL, with a 1:1 trainer-to-trainee ratio. PL methods of training offer additional ways to deliver training to obtain expertise needed. PL will address the need for cross training, introduce new equipment operations, and the successfully implement new processes. Many of the operators require skill upgrades to achieve competencies before they can safely operate machines and tools independently. Internal certifications for operating new machines and Surfcam Software will increase productivity, help avoid personal injury and/or decrease product damage. The instructor will be dedicated to delivering training during all training hours. PL attendance rosters will be used to assist in meeting ETP's record-keeping requirements.

### **Commitment to Training**

Freetech's annual training budget is \$25,000. Freetech's existing structured training covers new hire orientations, compliance training, required safety, tuition assistance for continuing education, and Lean seminars. Freetech represents all existing training will continue to be provided without utilizing ETP funding.

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

Freetech has a structured training department with three dedicated internal Administrators and over eleven in-house trainers. Training is scheduled to be delivered in-house. Freetech has retained AJ Helm Consulting in San Jose to assist with administrative services in connection with this proposal.

**RECOMMENDATION**

Staff recommends approval of this proposal.

## **Exhibit B: Menu Curriculum**

### **Class/Lab Hours**

8-60 Trainees Job 1 & 2 may receive any of the following:

#### **BUSINESS SKILLS**

- + Inventory Control
- + Customer Service and Communications
- + Quality Control

#### **COMPUTER SKILLS**

- + Intermediate and Advanced Microsoft Suite
- + Vista
- + Laserfiche Document Management Software
- + Surfcam Software
- + Enterprise Resource Planning
- + Production Systems Software

#### **CONTINUOUS IMPROVEMENT**

- + Team Building
- + Process Improvements & Quality Concepts
- + Production Operations / Workflow
- + Leadership Skills
  - o Coaching
  - o Meeting Facilitation
  - o Mentoring
  - o Crisis Management
  - o Performance Management
  - o Effective Communication
- + Quality Management
- + Procedure Codes

#### **MANUFACTURING SKILLS**

- + Cross Training
- + Cosmetic Finishing and Refinishing
- + Handling, Packaging, and Preservation
- + Lean Manufacturing
- + Count Assurance Techniques
- + Manufacturing Practices and Assembly Procedures
- + Non-certified Safety Training
- + Foreign Object Debris
- + CNC Equipment Operation
- + Measuring Equipment
  - o Mics
  - o Calipers
- + Customer Maintenance

#### **LITERACY SKILLS**

- + English as a second Language

#### **MANAGEMENT SKILLS (management trainees only)**

- + Supplier Approval
- + Disaster Recovery Plan (Non-certified safety)



- ✚ Quality Management System
- ✚ Control of Documents and Records
- ✚ Vista Data Entry
- ✚ Internal Audits
- ✚ Basic Leadership Management skills
- ✚ Processing Safety Data Sheets
- ✚ Common Solvents and Lubricants
- ✚ Epoxies and Adhesives

**PL Hours**

0 – 24

**MANUFACTURING SKILLS (limited ratio 1:1)**

- ✚ Cross Training
  - Assembly
  - Forming Operation
  - CNC Operation
- ✚ Inspection Tools, calipers, mics, height gauges
- ✚ Cosmetic Finishing and Refinishing
- ✚ Handling, Packaging, and Preservation
- ✚ Lean Manufacturing
- ✚ Count Assurance Techniques
- ✚ Production Operation Overview and Corrective Actions
- ✚ Manufacturing Practices and Assembly Procedures
- ✚ Non-certified Safety Training
- ✚ CNC Equipment Operation
- ✚ Forming Equipment Operation

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery. Safety training is limited to 10% of the total training hours per trainee. Literacy skills cannot exceed 45% of the total training hours per trainee.



**TRAINING PROPOSAL FOR  
Fulham Co., Inc.  
18-0618**

**Panel Meeting Date:** 03/23/2018  
**Regional Office:** North Hollywood Regional Office  
**Analyst Name:** Lan Vuong  
**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.

<b>TOTAL ETP FUNDING: \$49,400</b>			
<b>Program &amp; Admin Cost</b>	<b>Support Cost (\$)</b>	<b>Substantial Contribution (\$)</b>	<b>Total In-Kind</b>
\$49,400	N/A	\$0.00	\$58,463.00

**APPLICANT PROFILE**

<b>Company Summary</b>	Fulham Co., Inc. (Fulham) manufactures lighting products and supplies such as LED and fluorescent lighting systems and applications. Its products are sold through over 3,000 lighting manufactures and distributors worldwide.
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<b>Industry Sector(s)</b>	Manufacturing
<b>Priority Industry</b>	Yes
<b>No. Employees (Applicant)</b>	<b>State:</b> 80 <b>US:</b> 80 <b>World Wide:</b> 80
<b>Turnover Rate (Applicant)</b>	11.00 %
<b>Repeat Contractor</b>	No
<b>High Unemployment Area</b>	No
<b>Union(s)</b>	N/A

## **TRAINING PROFILE**

<b>Training Objective(s)</b>	To remain competitive as technology evolves and customer demand increases, Fulham has developed a company-wide training to upgrade worker skills, increase production efficiencies, and effectively manage its overall business operations.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

<b>#</b>	<b>Group Characteristics</b>	<b># Of Trainees</b>	<b>Reimbursement Rate</b>	<b>Weighted Avg. Hours</b>	<b>Cost Per Trainee</b>	<b>Min-Max Hours</b>
1	Retrainee	76	\$26.00	25	\$650	8 - 60

# PROPOSED TRAINING PROJECT DETAILS

## 1. Company Background

Founded in 1994 and headquartered in Hawthorne, Fulham manufactures cost-efficient lighting component and solutions, including fluorescent, lighting control systems, Light Emitting Diode (LED) drivers, modules, engines, LED and fluorescent exit and emergency lighting solutions, electronic High Intensity Discharged and induction lighting systems. Its products, systems and applications are used in medical buildings, commercial spaces, government facilities, schools, spaces without windows, industrial, commercial, municipal and residential.

Training will take place at the Hawthorne facility. Training will be delivered by in-house experts and vendors as needed.

This is Fulham's first ETP Agreement.

## 2. Current Training Project Details

<b>Purpose of Training</b>	<p>Fulham continues to change and grow towards smarter and innovative technology. Customers want more efficient lighting products that use less energy and are greener. The Company must produce products that will protect environment and require less electricity to provide lighting solutions. Its products have shifted to include technology that enables lighting programmability, connectivity and controllability. As such, the Company constantly strives to meet customers' expectations and demands by manufacturing the best lighting products and systems while also reducing operational costs.</p> <p>Its goal is to become a recognized leader in value-based lighting, attract new customers and serve its diverse customers with the most cutting edge products. Therefore, training is essential to the Company's business operations and success.</p> <p>Fulham has developed a company-wide program to upgrade the job skills of its employees, stay up-to-date with the latest computer technology, and improve the quality of its products and services. Training will provide workers with product knowledge, be proactive with technological advances, and keep up with industry changes. Training will enhance job security, providing employees the necessary tools to be successful in their jobs to be promoted within the Company, and contribute to the Company's success.</p>
<b>Training Infrastructure and Administrative Plan</b>	<p>Training is scheduled to begin upon approval. Fulham has designated Human Resource staff to oversee training and administration responsibilities including scheduling training, coordinating with staff and securing rosters. Fulham has also retained a third party administrator for enrollment, data tracking and invoicing. (See Subcontractor below)</p>
<b>Marketing Plan (MEC Only)</b>	N/A

## PROPOSED TRAINING PROJECT DETAILS

<b>Support Cost Description (MEC Only)</b>	N/A
<b>Substantial Contribution Description</b>	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
<b>Summary</b>	
All occupations will receive Class/Lab and Videoconference training in Continuous Improvement, Business, Computer and Manufacturing Skills, as shown in detail in Attachment 2.	

### 4. Additional Company or Training Project Details

#### 4.1 Program Waivers

N/A

#### 4.2 Subcontractor Summary

Fulham has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$900.00
Administrative	Training Funding Source	Seal Beach	13% of payment earned
Training	To Be Determined	N/A	N/A

#### 4.3 Previous ETP Project Summary

N/A

#### 4.4 Supporting Panel Proposal Documentation

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

## Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Coaching/Communication
	Customer Relations
	Goal Setting
	Leadership
	Marketing/Business Development/ Sales
	Negotiation Skills
	Planning
	Product Knowledge
	Project Management
	Proposal Writing
	Time Management
	Work Processes/Procedures
	Computer Skills (Standard)
Domo (Business Intelligence)	
Dynamics Customer Relationship Management	
eCommerce	
Human Capital Management	
Macola by Exact (Enterprise Resource Planning)	
Microsoft Office/Project	
OneDrive	
Payroll/Human Resources	
Scheduling System	
SharePoint	
Tablets/Handheld Equipment	
Adobe Creative Suite--InDesign, Photoshop	
Continuous Improvement Skills	Cost Reduction
	Eliminating Waste
	ISO
	Kaizen
	Performance/Process Improvement
	Problem Solving/ Root Cause Analysis
	Quality/Productivity Improvement
	Six Sigma
	Teambuilding
	Workflow improvement
	Equipment interaction with people
Manufacturing Skills (ME) (Standard)	Ballasts, Batteries, Lights and Signs
	Halogen Transformers
	Hotspot Light-Emitting Diode (LED) Emergency Systems

## Attachment 2 - Training Delivery and Curriculum Listing

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

Ingress Protection Rating
Lamps
Light/Motion Detection (Ambient Light)
Lighting Fixtures, Voltage/Wattage
Solar Powered
Switches/Dimmers
LED Drivers, Retrofit Kits, Engines, Modules
High Intensity Discharged Systems
Underwriter Laboratory Standard



## TRAINING PROPOSAL FOR

**HSA & Associates, Inc.**

**18-0586**

**Panel Meeting Date:** 03/23/2018

**Regional Office:** North Hollywood Regional Office

**Analyst Name:** Elsa Wadzinski

**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.

<b>TOTAL ETP FUNDING: \$49,504.00</b>			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$49,504.00	N/A	\$0.00	\$75,040.00

### APPLICANT PROFILE

<b>Company Summary</b>	HSA & Associates, Inc. (HSA) ( <a href="http://www.hsaassociates.com">www.hsaassociates.com</a> ) provides structural engineering services for the construction industry. The Company specializes in construction of tilt-up warehouses, structural design, and construction support services for office and commercial buildings and shopping malls.
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<b>Industry Sector(s)</b>	Professional, Scientific, and Technical
<b>Priority Industry</b>	Yes
<b>No. Employees (Applicant)</b>	<b>State:</b> 35 <b>US:</b> 35 <b>World Wide:</b> 35
<b>Turnover Rate (Applicant)</b>	10.00 %
<b>Repeat Contractor</b>	No
<b>High Unemployment Area</b>	No
<b>Union(s)</b>	N/A



## **TRAINING PROFILE**

<b>Training Objective(s)</b>	Training will assist in the creation and support of processes, and provide employees with the skills to insure consistency in design and engineering used for customer facilities.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

<b>#</b>	<b>Group Characteristics</b>	<b># Of Trainees</b>	<b>Reimbursement Rate</b>	<b>Weighted Avg. Hours</b>	<b>Cost Per Trainee</b>	<b>Min-Max Hours</b>
1	Owner, Retrainee	2	\$26.00	53	\$1,378	8 - 60
1	Retrainee	32	\$26.00	53	\$1,378	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	2	\$26.00	51	\$1,326	8 - 60

# PROPOSED TRAINING PROJECT DETAILS

## 1. Company Background

Founded in 1979, and headquartered in La Mirada, HSA provides structural engineering services to customers in need of tilt-up construction; construction services for office buildings and shopping malls. Customers include Internet Fulfillment Center, Anaheim Concourse, Refrigerated Food Distribution Centers, American Tire Distributors, The Park at Crossroads and Chino South Industrial Center.

This will be HSA's first ETP Agreement. Training will take place at the Company's single facility in La Mirada.

## 2. Current Training Project Details

<b>Purpose of Training</b>	<p>As HSA's customer base grows, the Company must provide training in new structural designs to maintain consistency in the buildings being produced. As new building locations expand overtime, building and construction requirements also change. Training will help staff stay current on a variety of building and construction codes and standards; including building codes for seismic loads that are updated regularly. The Company also needs to train staff on product knowledge related to trending/new building materials, and how they pertain to specific designs.</p> <p>Employees also need to develop and enhance skills on new and upgraded software and technology used for creating and building models and blueprints. Project management and leadership skills are also needed for all occupations to support business growth. Administrative Staff and Principals need training on the Company's new accounting software. All positions need training on JobTrack software, a new Cloud based business management system with content management, email marketing, Customer Resource Management (CRM), quoting, and job-tracking.</p> <p>HSA's current training plan illustrates Drafters and Engineers receiving a minimum of 2 to 3 hours of training per week throughout the term of the Agreement. Training for all other occupations will be between 6 and 8 hours per month. Training will be delivered by in-house experts and vendors as needed.</p>
<b>Training Infrastructure and Administrative Plan</b>	<p>HSA's Principal will oversee training and administration including enrolling trainees, tracking hours and scheduling training. HSA has also retained Welsh Advisors to assist with tracking hours, upload training hours and invoice for progress payments.</p>
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A

## PROPOSED TRAINING PROJECT DETAILS

<b>Substantial Contribution Description</b>	N/A
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### 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
<b>Summary</b>	
All occupations will receive Computer and Business Skills training. Commercial Skills training will only be provided to Engineers, Drafters, Principals and Accounting Manager.	

### 4. Additional Company or Training Project Details

#### Retrainee-Job Creation

HSA has two customers experiencing rapid growth and are adding new business locations at a very fast pace. In an effort to support these growing businesses, HSA has committed to hiring two new Drafters as outlined in Group 2 of the Proposal.

To be eligible for reimbursement, trainees must be hired during the three-month period prior to Panel approval, or during the contract term. In support of job creation, newly hired employees will be subject to a lower post-retention wage. Trainees will be hired into “net new jobs” as a condition of the contract.

#### 4.1 Program Waivers

N/A

#### 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	\$3,465.28
Administrative	Welsh Advisors, Inc.	Anaheim	13.00% 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 details on the trainees, curriculum and 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>
<b>Training Type (Level)</b>	<b>Planned Course Offerings</b>
Business Skills	Business and Project Management Skills
	Leadership Skills
Commercial Skills (Standard)	American Concrete Institute Updates
	Building and Construction Codes Update
	Building and Construction Standards
	Design Standards
	Product Knowledge
Computer Skills (Standard)	Agera Software- Accounting System
	Autocad
	Drafting Standards
	InDesign
	Jobtrack Software
	Microsoft Office Intermediate
	OpenAsset- Project Digital Library
	Revit
	SketchUp
	Technical Programs, e.g. E-tabs



**TRAINING PROPOSAL FOR**  
**KMicro Tech, Inc.**  
**18-0631**

**Panel Meeting Date:** 03/23/2018  
**Regional Office:** San Diego Regional Office  
**Analyst Name:** Kellen Hernandez  
**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.

<b>TOTAL ETP FUNDING:</b>		<b>\$ 23,712.00</b>	
<b>Program &amp; Admin Cost</b>	<b>Support Cost (\$)</b>	<b>Substantial Contribution (\$)</b>	<b>Total In-Kind</b>
\$ 23,712.00	N/A	\$ 0.00	\$ 36,000.00

**APPLICANT PROFILE**

<b>Company Summary</b>	KMicro Tech, Inc. (KMicro) ( <a href="http://www.kmicro.com">www.kmicro.com</a> ) provides information technology (IT) management services focused on IT infrastructure including servers, network switches, routers, firewalls and IT software.
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<b>Industry Sector(s)</b>	Professional, Scientific, and Technical
<b>Priority Industry</b>	Yes
<b>No. Employees (Applicant)</b>	<b>State: 24</b> <b>US: 24</b> <b>World Wide: 24</b>
<b>Turnover Rate (Applicant)</b>	0.00 %
<b>Repeat Contractor</b>	No
<b>High Unemployment Area</b>	No
<b>Union(s)</b>	N/A

## **TRAINING PROFILE**

<b>Training Objective(s)</b>	Training will allow the Company to remain competitive and grow by building sales and technical skills to increase efficiency and productivity.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

<b>#</b>	<b>Group Characteristics</b>	<b># Of Trainees</b>	<b>Reimbursement Rate</b>	<b>Weighted Avg. Hours</b>	<b>Cost Per Trainee</b>	<b>Min-Max Hours</b>
1	Retrainee	24	\$ 26.00	38	\$ 988	8 - 60

# PROPOSED TRAINING PROJECT DETAILS

## 1. Company Background

Founded in 2014 and headquartered in Irvine, KMicro offers platform services by managing IT infrastructure and managed security services to monitor network traffic and outside intrusion, and conduct vulnerability scanning and endpoint security. The Company also provides migration services, moving data to cloud platforms (Office 365, Sharepoint, Azure, Amazon Web Services). KMicro's main customer base are medium-sized companies (200-300 staff) with limited IT departments. KMicro is based in one location. This will be the Company's first ETP Agreement.

## 2. Current Training Project Details

<b>Purpose of Training</b>	<p>The IT managed services sector is experiencing decreasing prices amid increasing competition. To remain competitive, KMicro will need to expand business capacity and focus on increasing sales and market share. To do this, Sales Staff and System Engineers must receive specialized sales training including Foundations, Prospecting and Developing Referrals. This training will help Sales Staff increase productivity and efficiency by improve problem-solving skills. System Engineers will receive sales training focused on Customer Service, Enterprise Selling Skills and Negotiation Skills. This training will improve communication with clients.</p> <p>Additionally, the Company must stay current with new products and software updates. Training will allow staff to communicate the benefits/solutions of its services.</p>
<b>Training Infrastructure and Administrative Plan</b>	<p>Training will be delivered at KMicro and Sales Coaching Inc. (Sandler Training) offices. KMicro's VP of Managed Services will be managing project administration. Sandler Training will also be assisting with project administration by scheduling training, tracking attendance at training sessions and uploading hours into the ETMS platform.</p> <p>KMicro is ready to train once approved. Trainers are subject-matter experts and vendors.</p>
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A
<b>Substantial Contribution Description</b>	N/A

## PROPOSED TRAINING PROJECT DETAILS

### 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
<b>Summary</b>	
All occupations will receive job specific training in Business, Computer and Continuous Improvement Skills topics listed under Attachment 2.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
<b>Summary</b>	
All occupations will receive job specific training in Business Skills topics listed under Attachment 2	

### 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).

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
<b>Development</b>	Sales Coaching Inc	Irvine	N/A
<b>Administrative</b>	Sales Coaching Inc	Irvine	Not to exceed 10.00% of earned funds
<b>Training</b>	Sales Coaching Inc	Irvine	TBD

#### 4.3 Previous ETP Project Summary

N/A

#### 4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.



## Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication Skills
	Conflict Management
	Customer Relations
	Customer Service
	Develop Proposals
	Develop Referrals
	Enterprise Selling Skills
	Negotiation Skills
	Non Face-to-Face Communication
	Problem Solving
	Prospecting
	Sales Foundations
	Sales Manager Development
	Sales Mastery
Computer Skills (Standard)	Advanced Microsoft
	Computerized Scheduling
	Cost Accounting
	CRM
	CWAutomate Implementation
	Datto
	Human Resources
	Nectar Implementation
	Sales Forecasting
	Veeam
	Continuous Improvement Skills
Management Coaching	
Problem Solving	

## 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	Communication Skills
	Conflict Management
	Customer Relations
	Customer Service
	Developing Proposals
	Developing Referrals
	Enterprise Selling Skills
	Negotiation Skills
	Non Face-to-Face Communication
	Prospecting
	Sales Foundations
	Sales Manager Development
	Sales Mastery



**TRAINING PROPOSAL FOR**  
**Label Impressions, Inc.**  
**18-0652**

**Panel Meeting Date:** 03/23/2018  
**Delegation Order Date:** 02/14/2018  
**Regional Office:** San Diego Regional Office  
**Analyst Name:** Cassandra Clady  
**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.

<b>TOTAL ETP FUNDING:</b>		<b>\$ 46,410.00</b>	
<b>Program &amp; Admin Cost</b>	<b>Support Cost (\$)</b>	<b>Substantial Contribution (\$)</b>	<b>Total In-Kind</b>
\$ 46,410.00	N/A	\$ 0.00	\$ 79,192.00

**APPLICANT PROFILE**

<b>Company Summary</b>	Label Impressions, Inc. (Label Impressions) manufactures custom labels and packaging for clients throughout the United States.
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<b>Industry Sector(s)</b>	Manufacturing		
<b>Priority Industry</b>	Yes		
<b>No. Employees (Applicant)</b>	<b>State:</b> 60	<b>US:</b> 60	<b>World Wide:</b> 60
<b>Turnover Rate (Applicant)</b>	12.00 %		
<b>Repeat Contractor</b>	Yes		
<b>High Unemployment Area</b>	No		

<b>Union(s)</b>	N/A
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**TRAINING PROFILE**

<b>Training Objective(s)</b>	Training will improve efficiencies necessary to be highly competitive within the industry and provide excellent customer service.
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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	51	\$ 26.00	35	\$ 910	8 - 60

# PROPOSED TRAINING PROJECT DETAILS

## 1. Company Background

Founded in 1988 and headquartered in Orange, Label Impressions Inc. (Label Impressions) specializes in flexographic, foil-stamped, screen-printed, tree-free, Forest Stewardship Council (FSC)-certified, and biodegradable labels-as well as hangtags, pouches, packets, and sachet printing. The Company's products are printed with either water-soluble or soy inks. Label Impressions provides labels and packaging in the cosmetic, food, pharmaceutical, lawn and garden, and Nutraceutical industries. Customers include Costco, Williams Sonoma, Trader Joe's and V05.

## 2. Current Training Project Details

### Purpose of Training

This will be Label Impressions' sixth ETP Agreement, third within the last five years. In its previous ETP projects, the Company provided workers with extensive training in leadership and communication skills and introduced them to concepts of empowerment. Training in the most recent Agreement focused on newly purchased equipment, product quality, streamlining workflow, and improving manufacturing processes. The proposed training plan will build upon training delivered in the previous Agreement. Some Curriculum topics are repeated from the last agreement; however, the subject matter has been updated, so there will be no duplication of training.

Label Impressions has identified training needs by conducting focus groups and individual meetings with department heads. The assessment focused on current business needs and needs in the next 2 years. The assessment results identified the need for more employees to be trained in digital processes rather than Flexographic processes (Flexo). Although Label Impressions is known for its Flexo, digital processing is more efficient (increased printing speed, reduced setup time, higher image quality and lower cost for short runs). Flexo is still the core business process used; however, the Company is trending towards digital printing, recently investing \$1.3M in digital labeling equipment in October 2017. The Company experienced 20% growth in the past year as a result of increased volume and capacity directly tied to digital processing. Training will improve employee skills and knowledge of equipment and processes and increase productivity.

Additionally, Label Impressions needs to train recently hired employees as well as prepare promoting incumbent workers. Training will prepare these employees to be successful in their positions.

## PROPOSED TRAINING PROJECT DETAILS

<b>Training Infrastructure and Administrative Plan</b>	The Company has designated two representatives, a production and an administrative staff member, to schedule, enroll and ensure accurate documentation. The Company also retained a third-party subcontractor to assist with administration.  Trainers will be in-house subject-matter experts and vendors, if necessary.
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A
<b>Substantial Contribution Description</b>	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
<b>Summary</b>	
All occupations identified in Attachment 1 will receive training applicable to their jobs in Business Skills, Computer Skills, Continuous Improvement Skills, and Manufacturing Skills.	

Delivery Method/Level	Productive Laboratory
<b>Summary</b>	
Production Workers identified in Attachment 1 will receive training in Manufacturing Skills.	

### 4. Additional Company or Training Project Details

#### Productive Laboratory – Manufacturing Skills

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

Label Impressions requests up to 16 hours of PL training for 20 Production/Pre-Press Staff in Manufacturing Skills. New employees lack hands-on training and existing trainees must learn new equipment operation. This applies to both Flexographic as well as Digital operators. PL will also support cross training for press operators. Training will be at a 1:1 trainer-to-trainee ratio to ensure trainees receive a broader understanding of the entire manufacturing process.

## PROPOSED TRAINING PROJECT DETAILS

### 4.1 Program Waivers

#### Request for 2-year term

Small business proposals are usually limited to a one-year term. However, due to new equipment and extensive training, Label Impressions is requesting a two-year term to train staff on Digital Press equipment. This will allow more flexibility to adjust the training schedule when there is an increase in production and during vacations and holidays.

### 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	Thomas D Bright	San Diego	\$ 3,000.00
Administrative	Thomas D Bright	San Diego	Not to exceed 13.00% of earned funds
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
ET17-0287	Orange	10/28/2016-10/27/2017	\$29,120	\$25,818	88%
ET16-0199	Orange	09/24/2015-09/23/2016	\$15,600	\$15,600	100%
Notes	ET17-0287 training ended on 07/27/2017. Label Impressions documented 993 eligible training hours for 35 trainees for potential earnings of \$25,818 (88%). The final invoice closeout was submitted on 12/05/2017 and is currently being processed.				

### 4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

## Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Basic Financial Skills
	Business Writing Skills
	Customer Retention Skills
	Customer Service Skills
	Estimating Skills
	Inventory Control
	Managing Meetings
	Project Management Skills
	Purchasing Processes and Procedures
	Recruiting Skills
	Time Management
Computer Skills (Standard)	Advanced Microsoft Office Skills
	MIS Software
Continuous Improvement Skills	Advanced Communication Skills
	Advanced Leadership
	Coaching One-On-One
	Communication Skills
	Influence Without Authority
	Leadership
	Leading Change
	Lean Six Sigma Skills
	Motivation
	Team Skills
	Train-The-Trainer
Manufacturing Skills (ME) (Standard)	10-Hour OSHA
	30-Hour OSHA

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	Digital Processes and Procedures
	Flexographic Processes and Procedures
	Pre Press Skills
	Rewind Skills

<i>PL Justification and Details</i>	
Explain the need for productive laboratory (PL) training	Productive Lab is required for newly hired Press, Flexographic, and Digital Press Operators coming into the industry who lack hands on training and incumbents who require training in new equipment. Trainees will also be cross-trained on different equipment.



## Attachment 2 - Training Delivery and Curriculum Listing

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

Describe the Equipment/Processes to be used in delivering the PL training	Flexographic press operations. Digital press operations. Pre-press operations, including kitting and plate making Rewind operations	
Describe Trainer Qualifications	Each trainer in each function has been working in that function for at least one year. The trainer will have completed a train-the-trainer course	
<b>Trainer to Trainee Ratios</b> - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	<b>Trainer</b>	<b>Trainee</b>
Ratio for One Class, or Minimum When More than One Class	1	1
Ratio for Maximum Ratio When More than One Class	1	1
PLT Approval	Yes	



**Training Proposal for:**  
**Lam Research Corporation**  
**Agreement Number: ET18-0175**

**Panel Meeting of:** March 23, 2018

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

**Analyst:** C. Hoover

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Technology/Other  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: 2,882	U.S.: 5,521	Worldwide: 9,516
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	16%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$49,680		\$0	\$0		\$49,680

In-Kind Contribution:	100% of Total ETP Funding Required	\$151,800
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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	Computer Skills, Continuous Improvement	92	8-200	0	\$540	\$18.22
				Weighted Avg: 30			

**Minimum Wage by County:** \$18.22 per hour for Alameda County.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Senior Manager		10
Manager		5
Senior Buyer/Expeditor		1
Project Manager (non-supervisory)		35
Senior Engineer		5
Senior Scheduler/Planner		10
Engineer		11
Operations Analyst		12
Product Change Analyst		2
Quality		1

**INTRODUCTION**

Founded in 1980 and headquartered in Fremont, Lam Research Corporation (Lam) ([www.lamrc.com](http://www.lamrc.com)) has facilities in Livermore, Tualatin (Oregon), Villach (Austria), and Osan (South Korea). Lam is a supplier of wafer fabrication equipment and provides services to the semiconductor industry (Samsung, Intel, TSMC, Toshiba, Hynix). Lam's products (semiconductor capital equipment) are the equipment that process silicon wafers into integrated circuits and memory that are found in every day electronic devices such as computers, cell phones, televisions and automobiles.

This is the fifth ETP Agreement, the fourth in the last five years. In Lam's previous ETP Agreement, training focused on APICS Demand & Supply and Lean 6 Sigma training. In this proposal, Lam's training will focus on project management skills. Though similar to the prior

project, training in this proposal includes employees that did not participate in the prior project. Training will increase employee skill level and facilitate company growth. No ETP-funded training will be duplicated.

## **PROJECT DETAILS**

Training will be delivered at Lam's Fremont and Livermore facilities.

Training will focus on continuous process improvement and focus on software applications. Training will focus on areas of the Company's Global Operations such as its Supply Chain, Planning, Logistics, Spare Operations and Supplier Quality.

### **Training Plan**

**Computer Skills:** Training will be offered to all occupations. Training will enable employees to extract data from local servers, perform data analysis and summarize in spreadsheet or chart format for management reviews.

**Continuous Improvement:** Training will be offered to all occupations. This training will provide project management skills needed to execute company initiatives. Training will also focus on eliminating waste and meeting customer demands for expeditious shipment of high-quality products.

### **Commitment to Training**

Lam spends \$1,000,000 on training annually in California with \$950,000 allocated to the Fremont facility and \$50,000 to the Livermore facilities, including:

- Work Place Harassment Prevention;
- Information Security;
- Environmental Health and Safety;
- Copy Exactly;
- Legal & Ethics Compliance;
- Kronos;
- Foreign Trade Awareness & Anti-boycott Compliance;
- New Hire Employee Training; and
- General Finance Overview.

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. Lam will continue to deliver the Company's required training (above), as well as any other needed training related to newly adopted software applications and/or changes in its business processes.

#### ➤ Training Infrastructure

This training project will be managed by the Global Ops Business Operations department consisting of two Directors (one from Project Management and one from Business Processes and Systems) and an Analyst. ETP rosters will be managed through the analyst by coordinating with the internal trainers and any training vendors prior to the delivery of training. The Project Management Director and the Business Processes and Systems Director will deliver some training. In addition, a Manager of Business Process Development will be delivering the Lean training.

**Impact/Outcome**

Training will improve the Company's efficiency.

The Continuous Improvement training's "Lean All The Enterprise" topic is focused on Statistical Process Control techniques. Lean training will teach employees to identify no-value process steps and resource savings through process improvement.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0304	Fremont, Livermore	12/14/15 – 12/13/17	\$48,816	\$39,519* (81%)
ET13-0318	Fremont, Livermore	4/1/13 – 3/31/15	\$99,000	\$49,221 (50%)
ET11-0209	Fremont, Livermore	3/28/11 – 3/27/13	\$249,984	\$123,966 (50%)

\*Per ETP on-line systems, Contractor has tracked 2,212 hours with a potential earnings of 81%. Upon fiscal closeout, Contractor anticipates earning 100% of approved ETP funding.

ET13-0318: Not all of the participants were able to complete training in Continuous Improvement due to peak business periods. The training was delayed due to an upturn in business (50% increase in growth beginning in the latter half of 2013). Most of the targeted employees for training were in direct support of the increase in business. The following ETP Agreement (ET16-0304) was developed with a right-sized funding amount to reflect the Company's previous performance.

ET11-0209: Three months after the ETP Agreement was signed, Lam announced the acquisition of Novellus. At that point in time, 40% to 60% of the employees scheduled to attend ETP training were diverted to work on merging the two companies' ERP systems. Executive management wanted the two ERP systems migrated into a single system, which includes all functions. This was a huge undertaking as both companies had taken different approaches in business process and system configuration.

The Livermore employees were the most affected by the merger, and their training was delayed by several months. As well, due to unforeseen year-end reporting requirements, the Fremont staff were pulled from training to work on auditors' requests. Overall, training was delayed and fewer staff was able to reach the minimum number of hours required for ETP training.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

## **TRAINING VENDORS**

Dave Viale (Center for Manufacturing Education) of San Jose has been retained to provide ERP training for a fee of \$17,200. Other trainers will be identified for ETP record-keeping purposes, as they are retained by Lam.

**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8-200

Trainees may receive any of the following:

**COMPUTER SKILLS**

- Every Angle Software Application
- Kinaxis Software Application
- OPT (Information Delivery/Qlik) – Lam Designed Software Application
- QlikSense

**CONTINUOUS IMPROVEMENT**

- Project Management Methodology Overview for Leadership
- Problem Solving & Decision Making Process
- Introduction to Lean (Six Sigma)
- Lean All The Enterprise
- Project Management Fundamentals
- Project Management Methodology
- Work Break Down Structure
- Effective Presentation Skills
- Recovering Troubled Projects
- MS Project (Intermediate)
- Situational Leadership
- Scrum Master Certification Training
- APICS ERP Demand / Supply Training

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



**TRAINING PROPOSAL FOR**  
**Lindsay Transportation Solutions, Inc.**  
**18-0613**

**Panel Date:** 03/23/2018  
**Regional Office:** Sacramento Regional Office  
**Analyst Name:** Jesse Dongallo  
**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.

<b>TOTAL ETP FUNDING:</b>		<b>\$33,540.00</b>	
<b>Program &amp; Admin Cost</b>	<b>Support Cost (\$)</b>	<b>Substantial Contribution (\$)</b>	<b>Total In-Kind</b>
\$33,540.00	N/A	\$0.00	\$18,000

**APPLICANT PROFILE**

<b>Company Summary</b>	Lindsay Transportation Solutions, Inc. (Lindsay Transportation) is a transportation manufacturing company that specializes in various road safety machines, products, equipment, signs, and barrier systems.
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<b>Industry Sector(s)</b>	Manufacturing		
<b>Priority Industry</b>	Yes		
<b>No. Employees (Applicant)</b>	<b>State:</b> 50	<b>US:</b> 69	<b>World Wide:</b> 69
<b>Turnover Rate (Applicant)</b>	8.00 %		
<b>Repeat Contractor</b>	No		
<b>High Unemployment Area</b>	Yes		
<b>Union(s)</b>	N/A		



## **TRAINING PROFILE**

<b>Training Objective(s)</b>	Lindsay Transportation's training will focus on improving business operations, processes, and manufacturing practices to meet customer quality and demand requirements.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

<b>#</b>	<b>Group Characteristics</b>	<b># Of Trainees</b>	<b>Reimbursement Rate</b>	<b>Weighted Avg. Hours</b>	<b>Cost Per Trainee</b>	<b>Min-Max Hours</b>
1	Retrainee	43	\$ 26.00	30	\$780	8 - 60

# PROPOSED TRAINING PROJECT DETAILS

## 1. Company Background

Founded in 2006 and headquartered in Rio Vista, Lindsay Transportation designs and manufactures road infrastructure products and services that improve the safety and quality of California's transportation system.

Lindsay Transportation has innovated the transportation industry with specialized products in road safety such as movable barrier systems, X-LITE Guardrail systems, road markings, road accessories, and customized railroad products. The Company also manufactures a heavy vehicle, the Road Zipper Machine, which is used for movable barriers.

Lindsay Transportation's primary customers include the California Department of Transportation (Caltrans) and other transportation departments across the globe.

## 2. Current Training Project Details

<b>Purpose of Training</b>	<p>This will be Lindsay Transportation's first ETP Agreement. As one of the country's leading producers of roadway maintenance and safety products, Lindsay Transportation will focus training on staff skills development.</p> <p>The Company needs to improve process efficiencies to lower operations costs and improve maintenance quality. Training will focus on enhancing quality systems, as well as production operations, project performance management and leadership skills for frontline managers, field staff representatives, and production staff. Cross-training will be provided to diversify trainee skills and job functions.</p> <p>Training will be delivered via Class/Lab by in-house subject matter experts at Lindsay Transportation's facility in Rio Vista.</p>
<b>Training Infrastructure and Administrative Plan</b>	Lindsay Transportation has designated its Human Resources Manager and Plant Manager to plan and oversee all aspects of training. The Human Resources Representative has the primary responsibility of roster collection, enrolling trainees, and tracking training hours.
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A
<b>Substantial Contribution Description</b>	N/A

# PROPOSED TRAINING PROJECT DETAILS

## 3. Curriculum Summary

A summary of the curriculum is provided below. *Attachment 2 - Training Delivery and Curriculum Listing* provides full details.

Delivery Method/Level	Classroom/Simulated Laboratory
<b>Summary</b>	
All Occupations (Attachment 1) will receive training in Business, Computer, Continuous Improvement, and Manufacturing Skills topics (Attachment 2).	

## 4. Additional Company or Training Project Details

N/A

### 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

N/A

### 4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide details on the training, curriculum, and program.

## 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>
<b>Training Type (Level)</b>	<b>Planned Course Offerings</b>
Business Skills	Building Successful Teams
	Leadership Skills - Frontline Workers
	Payroll Systems
	Presentation Skills
	Project Performance Management
	Train the Trainer
Computer Skills (Standard)	Material Resource Planning
	Payroll Accounting
Continuous Improvement Skills	5s system - Kaizen
	ISO 9001
	Problem Solving
	Total Quality Management
Management Skills	Coaching
	Decision Making
	Motivation
	Team Building Skills
Manufacturing Skills (ME) (Safety)	OHSA 30
	OSHA 10
Manufacturing Skills (ME) (Standard)	Blueprint Reading
	Equipment Manufacturing
	Equipment Operations
	HVAC
	Hydraulic/Mechanical Skills
	Production Operations
	Quality Systems
	Shop Math Measurements

**DELEGATION ORDER**



**Training Proposal for:  
Merle Norman Cosmetics, Inc.  
Agreement Number: ET18-0197**

**Approval Date:** March 12, 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:	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: 323	U.S.:335	Worldwide: 335
<u>Turnover Rate:</u>	16%		
<u>Managers/Supervisors:</u> (% of total trainees)	18%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$45,144		\$0	\$0		\$45,144

In-Kind Contribution:	100% of Total ETP Funding Required	\$67,917
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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 Impr, Mfg. Skills	132	8-200	0	\$342	\$17.54
				Weighted Avg: 19			

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

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		30
Customer Service Staff		8
Production Staff		44
Research/Development/Design Staff		14
Sales/Marketing Staff		12
Manager/Supervisor		24

**INTRODUCTION**

Merle Norman Cosmetics, Inc. (MNC) ([www.merlenorman.com](http://www.merlenorman.com)), founded in 1931, develops, manufactures and distributes a full line of skin care and color cosmetic products. The Company's products are sold through approximately 1,251 independently owned and operated Merle Norman Cosmetic Studios in the United States, Canada, Mexico, Guatemala, and Bahrain.

MNC is headquartered in Los Angeles and operates an additional California facility in Sylmar. The Merle Norman line includes hundreds of tried-and-true products that address the full spectrum of skin care and color needs for all women. To ensure optimum quality, the Company researches, develops, manufactures and packages products in-house. Products are shipped daily to ensure freshness.

**PROJECT DETAILS**

This will be the Company's second ETP Agreement. System rollout delays prevented MNC from delivering a large percentage of training planned in the previous ETP Contract. (See Prior Projects Table). This proposal will continue training on the Company's new Enterprise Resource Planning (ERP) rollout.

MNC's recently finished implementing its new ERP system, in late 2017, with the remaining three phases scheduled to roll out in 2018. To achieve optimal system use and worker productivity, MNC must train employees on the innovative technology, process improvements, and a broad range of skills in the areas of customer service, sales, supply chain management, and logistics.

The proposed training will be provided at the Company's locations in Los Angeles and Sylmar. Training will be delivered by in-house subject matter experts and training vendors to be identified during the contract term.

### **Training Plan**

**Business Skills (5%):** Training will be offered to Customer Service, Sales/Marketing, and Administrative Staff who interface regularly with franchise representatives and customers. Trainees will learn effective customer relations and sales techniques.

**Computer Skills (75%):** Training will be offered to all occupations. All employees must receive training in the functionality and capabilities of the new ERP system. Trainees will learn how to use resource planning tools to improve production processes and communication. Select staff in all occupations will also receive Microsoft Office training to enhance productivity.

**Continuous Improvement (10%):** Training will be offered to all occupations. This training will help workers develop the skills to support the Company's transition to new systems, procedures, and standards.

**Manufacturing Skills (10%):** Training will be offered to Production Staff and Managers/Supervisors. Trainees will learn skills to manage inventory more effectively and ensure greater efficiency in manufacturing processes.

### **Commitment to Training**

MNC spends an estimated \$250,000 annually on training at its California locations. The Company currently provides on-the-job training related to specific job functions. Safety training is provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

MNC's Project Manager and support staff 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.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0482	Los Angeles	06/25/15 – 06/24/17	\$98,280	\$45,264 (46%)*

\*MNC representatives report that performance was negatively impacted due to multiple setbacks associated with the rollout of the new system. The Company experienced shifts in personnel at the leadership level and encountered a complete turnover in the team responsible for the new system rollout. These changes occurred approximately six months into the ETP Agreement term. When the new team was hired, they needed several months to get sufficiently established to move the project forward.

MNC has filled its open leadership positions and solidified its project team over the past year and a half. The Company's current IT Project Manager was brought onboard more than a year ago and has helped successfully plan and navigate the final stages of ERP implementation. The Project Manager has leadership's full support and is committed to completing the ERP rollout, including training at all levels.

To ensure greater success moving forward, MNC has made every effort to align the approval of this proposal with its next round of high volume training, currently scheduled for April 2018. The Company has also taken additional strides to ensure that it has the proper resources in place to support this vital initiative. Lastly, the proposed Agreement has been adjusted to a level comparable to prior earnings.

**DEVELOPMENT SERVICES**

California Manufacturing Technology Consulting (CMTc) in Torrance assisted with development for a flat fee of \$4,500.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

To Be Determined



**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8 - 200

Trainees may receive any of the following:

**BUSINESS SKILLS**

- + Customer Service
- + Sales

**COMPUTER SKILLS**

- + Enterprise Resource Planning
- + Microsoft Office (Int & Adv)

**CONTINUOUS IMPROVEMENT**

- + Leadership
- + Lean Manufacturing
- + Change Management
- + Problem Solving
- + Team Building
- + Quality Management System

**MANUFACTURING SKILLS**

- + Supply Chain Management
- + FDA Validation

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

**DELEGATION ORDER**



**Training Proposal for:**  
**Norman Industrial Materials, Inc. dba**  
**Industrial Metal Supply Company**  
**Agreement Number: ET18-0176**

**Approval Date:** February 27, 2018

**ETP Regional Office:** North Hollywood

**Analyst:** E. Wadzinski

**PROJECT PROFILE**

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Services  Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Riverside, Orange, 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: 301	U.S.:392	Worldwide: 392
<u>Turnover Rate:</u>	16%		
<u>Managers/Supervisors:</u> (% of total trainees)	19%		

**FUNDING DETAIL**

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	<b>Total ETP Funding</b>
\$28,512		\$0	\$0		\$28,512

<b>In-Kind Contribution:</b>	<b>100% of Total ETP Funding Required</b>	<b>\$184,223</b>
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**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Impr, Manufacturing Skills	144	8-200	0	\$2,592	\$16.70
				Weighted Avg: 11			

**Minimum Wage by County:** \$17.54 per hour for Los Angeles County, \$17.50 per hour for Orange County, \$16.70 per hour for Riverside and \$17.03 per hour for San Diego County.  
**Health Benefits:**  Yes  No This is employer share of cost for healthcare premiums – medical, dental, vision.  
**Used to meet the Post-Retention Wage?:**  Yes  No  Maybe  
 Up to \$1.90 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Production		50
Sales and Administration		66
Manager 1		20
Manager 2		8

**INTRODUCTION**

Norman Industrial Materials, Inc. dba Industrial Metal Supply Company (IMS) (imsmetals.com) is a full-line metal distributor and fabricator serving Southern California and Arizona. Founded in 1948 and headquartered in Sun Valley, the Company has additional facilities in California in San Diego, Irvine, and Riverside. The Company also has a facility in Arizona located in Phoenix. This proposal will include all four California locations.

IMS locations carry a large selection of metal alloys (in various shapes and sizes); specialty and decorative metals; and metal working tools and supplies in over 400,000 square feet of warehouse space. IMS offers processing solutions including cutting, sawing and shearing; punching and notching, and laser and plasma cutting. Customers are mainly construction and design entities consisting of general contractors, machine shops, fabricators, aerospace manufacturers, and signage and job shops. The Company also sells directly to consumers.

**PROJECT DETAILS**

This will be IMS’s second ETP Agreement. Training in the first Agreement focused on quality standards, product diversification, implementation of a new customer resource management (CRM) system (SalesForce.com) and new equipment (laser cutting equipment). Training in this proposal will focus on a new business Enterprise Resource Planning (ERP) system to help the Company expand range of functionality and improve business operations and productivity.

IMS operates in an increasingly competitive market with many offshore competitors. To remain competitive, the Company needs to maintain the highest levels of efficiency and cost controls to retain its customer base and continue to grow. For this, the Company devoted two years and invested \$1.2M to the selection and customization of an ERP system, BizTrack, that will be implemented this year. BizTrack will better support all aspects of the business and its various sites, from inventory to invoicing. Training will ensure that employees possess knowledge and skills to use the new system effectively which will result in improved productivity, increased efficiencies, decreased costs and streamlined processes.

IMS initially requested ETP funds in the amount of \$144,048, which was reduced by staff to the amount earned on the Company's prior project. Project staff was advised that IMS can request additional ETP funding within the term of the Contract with demonstrated performance.

### **Training Plan**

**Business Skills** – This training will be offered to all occupations, with a primary focus on Sales/Administration employees. Training will provide skills to effectively interact with internal and external customers; better assess and meet customer expectations; and identify opportunities to increase sales.

**Computer Skills** - This training will be offered to all occupations. Training will ensure workers have the skills to effectively use the new ERP system to improve operations. Select Sales/Administrative and Management Staff will be offered Microsoft Office and Salesforce.

**Continuous Improvement** - This training will be offered to all occupations, with a primary focus on Production and Management staff. Training will improve efficiencies and operations through process improvement, Lean methodologies, and quality standards.

**Manufacturing Skills** - This training will be offered to production staff to ensure workers are cross-trained and have the technical knowledge to set up, operate, maintain, and trouble shoot IMS' tools and equipment.

### **Commitment to Training**

ETP funds will not displace the existing financial commitment to training. IMS's current annual training budget is approximately \$70,000 for training that includes new employee orientation, basic job skills and basic safety training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

#### ➤ Training Infrastructure

Training will commence upon Panel approval. IMS's Corporate Quality Manager will coordinate training and administration for this Agreement. The Corporate Quality Manager will appoint a designated lead person at each location to ensure ETP training plans are on track and performance requirements are met. IMS has also retained California Manufacturing Technology Consulting (CMTC) to assist with ETP administrative services.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0222	Sun Valley	08/04/14 – 08/03/16	\$94,600	*\$28,906 (31%)

\*In the prior Agreement, IMS earned \$28,906 (31%) of the \$94,600 in funding awarded due to the application process taking longer than anticipated. As a result, a large amount of planned training began before contract approval and was therefore not eligible to be included in the Agreement. The Contractor stated that the low earnings were due to the bulk of training being provided prior to Contract approval; adding that at that time, the Company had a firm training plan they had to execute. To avoid a reoccurrence of this situation, IMS has made every effort to align this application process with the execution of its current training plan as the new ERP system is in place with a go-live date set for early March 2018.

**DEVELOPMENT SERVICES**

IMS retained California Manufacturing Technology Consulting in Torrance to assist with development of this proposal for a flat fee of \$11,400.

**ADMINISTRATIVE SERVICES**

IMS also retained California Manufacturing Technology Consulting to assist and provide administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

**TRAINING VENDORS**

To Be Determined

**Exhibit B: Menu Curriculum**

**Class/Lab Hours**

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**

- Communication Skills
- Sales & Product Knowledge
- Customer Service
- Business Performance

**COMPUTER SKILLS**

- Enterprise Resource Planning
- Microsoft Office (Intermediate & Advanced)
- Salesforce

**CONTINUOUS IMPROVEMENT**

- Process Improvement
- Lean Manufacturing
- Quality Management Systems
- Quality Internal Auditor

**MANUFACTURING SKILLS**

- Metal Prep & Cutting
- Trimming Procedures & Order Packaging
- Machine Set Up & Changeover

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  
Plastics Plus Technology, Inc.  
18-0590**

**Panel Meeting Date:** 03/23/2018  
**Regional Office:** North Hollywood Regional Office  
**Analyst Name:** Mark Reeves  
**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.

<b>TOTAL ETP FUNDING:</b>		<b>\$ 7,774.00</b>	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 7,774.00	N/A	\$ 0.00	\$ 5,083.00

**APPLICANT PROFILE**

<b>Company Summary</b>	Plastics Plus Technology, Inc. (PPT) is a custom plastic injection and mold manufacturer located in Redlands.		
<b>Industry Sector(s)</b>	Manufacturing		
<b>Priority Industry</b>	Yes		
<b>No. Employees (Applicant)</b>	<b>State:</b> 36	<b>US:</b> 36	<b>World Wide:</b> 36
<b>Turnover Rate (Applicant)</b>	8.33 %		
<b>Repeat Contractor</b>	Yes		
<b>High Unemployment Area</b>	No		
<b>Union(s)</b>	No		

## TRAINING PROFILE

<b>Training Objective(s)</b>	The proposed training will enhance the skills of key employees in the areas of planning, scheduling, managing, problem solving, and leadership.
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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	23	\$ 26.00	13	\$ 338	8 - 60



# PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

## 1. Company Background

Founded in 1979, PPT is a plastic injection molding company that specializes in high tolerance parts for the medical, automotive, electronics, and industrial/commercial industries. The Company's injection molding processes include scientific molding, overmolding, insert molding, full automation capabilities, and utilization of a variety of filled and unfilled resins. PPT's in-house tool manufacturing services include a fully equipped mold shop that provides new tool fabrication, as well as maintenance and modifications of existing molds.

## 2. Current Training Project Details

<b>Purpose of Training</b>	PPT strives to achieve growth by doubling its revenues and increasing profits fourfold. The Company has identified training necessary to help PPT sustain its upward trajectory. This proposal focuses on Continuous Improvement and Management Skills training designed to improve: Management Capability (data collection/analysis and leadership); Cost Reduction (understanding financials, continued lean improvements, and quality improvements); Social Responsibility (environmental compliance); and Innovation (innovation engineering and automation).  Training will take place at the Company's location in Redlands. Course instruction will be provided by in-house subject matter experts.
<b>Training Infrastructure and Administrative Plan</b>	PPT has an annual training budget of approximately \$1,500. The Company's Director of Operations will oversee project management with the assistance of administrative staff.
<b>Marketing Plan (MEC Only)</b>	N/A
<b>Support Cost Description (MEC Only)</b>	N/A
<b>Substantial Contribution Description</b>	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
<b>Summary</b>	
All occupations will receive Continuous Improvement training. Managers, Supervisors, and the Owner will receive Management Skills.	

# PROPOSED TRAINING PROJECT DETAILS

## 4. Additional Company or Training Project Details

N/A

### 4.1 Program Waivers

N/A

### 4.2 Subcontractor Summary

N/A

### 4.3 Previous ETP Project Summary

The table below summarizes PPT'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
ET16-0250	Redlands	10/26/15 – 10/25/17	\$26,312	\$7,546	29%
<b>Notes</b>	<p>PPT's representative states the Company's first ETP project reflected an aggressive training plan intended to support PPT's business growth objectives. However, the Company's leadership team and training plan were disrupted considerably due to the unforeseeable absence of PPT's President/Owner for nearly a year during the contract term. During this absence, the Company had to restructure the duties of its remaining leadership team, which significantly impacted the delivery of planned training.</p> <p>PPT now has the necessary personnel and resources in place to support training. The Company's first ETP project contained various topics under Business, Continuous Improvement, Hazardous Materials, Management, and Manufacturing Skills. The proposed project consists of a more narrowly defined scope of Continuous Improvement and Management Skills topics, most of which are on the Curriculum for the first time.</p> <p>PPT's Director of Operations will coordinate the training and administration. As the architect of the proposed training plan, the Director of Operations revamped the course content and made adjustments in mapping out training delivery that will be less susceptible to organizational disruptions. These adjustments are a byproduct of contingency planning for key staff absences and/or spikes in production.</p>				

### 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>
<b>Training Type (Level)</b>	<b>Planned Course Offerings</b>
Continuous Improvement Skills	7 Core Quality Tools
	Design and Development Process
	Environmental Management
	IATF16949
	Innovation Engineering
	Kaikaku
	Shop Floor 5S
	Total Productive Maintenance
	TPM Kaizen
Management Skills	Developing Tactical Plans
	Implementing a Strategic Plan
	Leadership
	Leading Organizational Transformation
	Project Management
	Quantifying ROI

**DELEGATION ORDER**



**Retrainee - Job Creation  
Training Proposal for:  
Walter, Wolfe, Leach and Nii, LLC**

**Small Business**

**ET18-0177**

**Approval Date:** February 27, 2018

**ETP Regional Office:** Sacramento

**Analyst:** J. Dongallo

**CONTRACTOR**

- Type of Industry: Financial Services
  
  - Number of Full-Time Employees
    - California: 33
    - Worldwide: 33
    - Number to be trained: 33
  
  - Out-of-State Competition: No OSC
  - Special Employment Training (SET):  Yes  No
  - High Unemployment Area (HUA):  Yes  No
  - Turnover Rate: 10%
  - Repeat Contractor:  Yes  No
- Priority Industry:  Yes  No
- Owner  Yes  No

**FUNDING**

- Requested Amount: \$35,640
- In-Kind Contribution: \$36,000

**TRAINING PLAN TABLE**

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Management Skills	30	8-60	0	\$1,056	*\$12.53
				Weighted Avg: 48			
2	Retrainee-Job Creation SB <100 SET HUA	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	3	8-60	0	\$1,320	*\$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.

- Reimbursement Rate: Job # 1 & 2: \$22 SB Non-Priority
- County(ies): Fresno
- Occupations to be Trained: Administration Staff, Certified Public Accountant (CPA), Accounting Support Staff, Client Managers, Supervisor, Manager, Owner
- Union Representation:  Yes  
 No
- Health Benefits: Job #1: \$1.53 per hour

**SUBCONTRACTORS**

- Development Services: Strategic Business Solutions, LLC of Visalia assisted with development for a flat fee of \$2,494.80
- Administrative Services: Strategic Business Solutions will also perform administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 2016 and headquartered in Fresno, Walter, Wolfe, Leach, and Nii, LLC (WWLN) (<http://www.twcpa.com>) is an accounting firm and business consulting enterprise that specializes in tax preparation, comprehensive tax planning strategies, payroll services, and finance management. Their customers range from private individuals to all types of corporate,

partnership and non-profit organizations. Training will be conducted at the Company's location in Fresno.

## **Training Plan**

This is WWLN's second contract, the second within the last 5 years. In this proposal, WWLN will continue to build on their previous training of improving account strategies, networking, tax planning, and preparation. The Company will also provide training on additional new software and processes. There will be no duplication of training for trainees who participated in the prior contract.

According to the Bureau of Labor, the accounting industry is expected to grow 10% every year, which is faster than industry average. To keep pace with this growth, WWLN is implementing a new internal Operating System, SurePrep 582.04. Training will provide staff with the necessary skills to properly navigate and integrate client database, manage inventory, deliver sales options, apply accounting functions, and implement marketing strategies.

Additionally, the Company will offer courses in Account Strategies, Best Practices, Tax Credit Programs, and Advanced Customer Service Skills to ensure trainees develop a strong company culture focusing on customer retention and growth through improved services and support.

## **Retrainee - Job Creation**

Growing customer demand in both the restaurant and private country club industries has created a need for these clients to obtain industry specific accounting services for better efficiency. The specialized consulting services offered by WWLN has secured many new clients within the restaurant and country club industries. To support this expansion of services, the Company has committed to hiring 3 new employees (Job number 2). Additionally, WWLN actively recruits interns from local educational institutions, such as CSU-Fresno, to support the Company in providing services.

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

## **PROJECT DETAILS**

### **Training Plan**

Trainees will receive 8-60 hours of Classroom/Laboratory training delivered by in-house subject matter experts.

**Business Skills:** Training will be offered to all occupations to improve project management, customer service, and marketing skills. Training topics will include Advanced Customer Service Skills, Account Strategies, Networking, Social and Media Marketing.

**Commercial Skills:** Training will be offered to all occupations on preparation and documentation of various financial statements or records. Training will create uniformity, insuring that all accountants organize their projects in the same manner. Training topics include advanced levels of Financial Statement Preparation and Generations, Affordable Care Act, Business Practice Management, and Tax Planning and Preparation.

**Computer Skills:** Training will be offered to all occupations to enhance computing abilities and increase knowledge of database creations, spreadsheets and reports in their new SurePrep Operation software system. Training will also focus on new website development and social

marketing. Training topics will include SurePrep Software 582.04, Advanced Computer Networking, and Advanced Aloha Restaurant Software.

**Continuous Improvement:** Training will be offered to all occupations to enhance staff decision-making skills, increase business efficiency and improve team building. Training topics include Team Building and Leadership Skills.

**Management Skills:** Training will be offered to Manager, Supervisor, and Owner occupations to enhance skills in creating and implementing a successful strategic plan, along with setting up a positive culture within the workplace. Training topics will include Strategic Planning, Coaching and Mentoring Skills.

### **Training Infrastructure**

WWLN has designated an Administrator and an additional staff member to plan and oversee all aspects of training. These are the same individuals that oversaw the administration of the prior Agreement. The Company already has a process in place to ensure all administrative duties are handled properly and all Managers are informed of the responsibilities.

In addition, WWLC has retained Strategic Business Solutions, LLC to assist with administrative requirements.

### **RECOMMENDATION**

Staff recommends approval of this proposal.

### **ACTIVE PROJECTS**

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

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0417	\$29,304	01/21/2017 - 01/20/2019	23	18	6

Based on ETP systems, 1,248 reimbursable hours (94%) out of a potential 1,332 hours have been tracked with \$18,930.75 paid to date (65% of approved amount). WWLN has already submitted their close-out invoice and is pending final approval from ETP fiscal. WWLN anticipates earning 100% of approved funding.

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

8-60

Trainees may receive any of the following:

**BUSINESS SKILLS**

- Account Development
  - Advanced Customer Service Skills
  - Account Strategies
- Effective Communications
- Networking
- Social and Media Marketing

**COMMERCIAL SKILLS**

- Accounting and Auditing
  - Tax Authority Audit
  - Tax Regulations
  - Tax Compliance
- Affordable Care Act
- Best Practices
- Business Practice Management/Consulting
- Financial Statement Preparation and Generation
- Gift and Estate Planning
- Tax Credit Programs
- Tax Planning and Preparation

**COMPUTER SKILLS**

- Aloha Restaurant Software (Intermediate/Advanced)
- Bill.com software (Intermediate/Advanced)
- Computer Networking (Advanced)
- Microsoft Office Suite (Intermediate/Advanced)
- Quickbooks Accounting Software (Intermediate/Advanced)
- Practice CS/File Cabinet CS/Fixes Assets CS/ Ultra Tax CS
- SurePrep Software 582.04
- Website/Network Development (Intermediate/Advanced)

**CONTINUOUS IMPROVEMENT**

- Leadership
- Team Building

**MANAGEMENT SKILLS (Managers and Supervisors Only)**

- Coaching/Mentoring
- Strategic Planning

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
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