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San Francisco Bay Area Regional Office
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Proposals for Multiple-Employer Contractors Tab

North Hollywood Area Regional Office
Chaffey Community College District – Workforce Training Institute
Professionals in Human Resources Association
Riviera, Inc. dba The Enterprise U
Southern California Heat & Frost Insulators and Asbestos Workers Joint Apprenticeship Committee
Southern California Roofers and Waterproofers Joint Apprenticeship and Training Fund
Ventura County Electrical Joint Apprenticeship and Training Trust Fund

San Diego Area Regional Office
Orange County Electrical Joint Apprenticeship and Training Trust Fund

San Francisco Bay Area Regional Office
San Mateo County Electrical Apprenticeship and Training Committee
United Association Local Union 342 Joint Apprenticeship and Training Committee
SUMMARY OF DELEGATION ORDERS

Delegation Orders

Beth Inc. dba Fix Auto Downtown LA
D.T. Mattson Enterprises, Inc. dba Pro-Line Racing
Engineered Well Service International Inc.
F. Lofrano & Son, Inc.
Giroux Glass Inc.
International Technologies & Systems Corporation dba ITSCO
Penguin Computing, Inc.
Torosian & Walter LLP
Trinus Corporation
Zobrist Consulting Group, Inc.
Memorandum

To: Panel Members

From: Stewart Knox
Executive Director

Date: September 25, 2015
File: Panel Memo Doc.

Subject: Directions to Meeting Site

The Employment Training Panel will meet on FRIDAY, September 25, 2015 at 9:30 a.m.

California Environmental Protection Agency
Coastal 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 - Coastal Hearing Room

From Sacramento International Airport:

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

From San Francisco:

- Take I-80 E
- Merge onto I-5 N
- Exit on “J” Street to 11th St.
- Turn Left on 11th Street
- Turn Left on I Street
- 1001 I Street
**Memorandum**

To: Panel Members  
From: Stewart Knox  
File: Mtg. Site Memo

**Subject:** Future Meeting Sites

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<td>October 23, 2015</td>
<td>New City Hall – Sacramento</td>
<td>09:30 AM</td>
<td>915 I Street, Sacramento, CA 95814</td>
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<td>Council Chambers, Room 1103, 1st Floor</td>
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<td>December 4, 2015</td>
<td>New City Hall – Sacramento</td>
<td>09:30 AM</td>
<td>915 I Street, Sacramento, CA 95814</td>
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<td>Council Chambers, Room 1103, 1st Floor</td>
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<td>January 22, 2016</td>
<td>California Environmental Protection Agency</td>
<td>09:30 AM</td>
<td>1001 I Street, Sacramento, CA 95814</td>
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STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL MEETING
California Environmental Protection Agency
1001 I Street
Sierra Hearing Room – 2nd Floor
Sacramento, CA 95814
August 28, 2015

PANEL MEMBERS

Barry Broad
Chair

Janice Roberts
Vice-Chair

Gloria Bell
Member

Sonia Fernandez
Member

Leslie McBride
Ex-Officio Member

Edward Rendon
Member

Sam Rodriguez
Member

Executive Staff

Stewart Knox
Executive Director

Maureen Reilly
General Counsel
I. PUBLIC PANEL MEETING CALL TO ORDER

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

II. ROLL CALL

Present
Gloria Bell
Barry Broad
Leslie McBride
Edward Rendon
Janice Roberts
Sam Rodriguez

Absent
Sonia Fernandez

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

III. AGENDA

Chairman Broad asked for a motion to approve the Agenda.

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

Motion carried, 6 – 0.

IV. MINUTES

ACTION: Ms. Roberts moved and Ms. McBride seconded the motion that the Panel approve the Minutes from the July 24, 2015 meeting.

Motion carried, 6 - 0.
V. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director said, good morning Panel members, applicant, and stakeholders. Following the last Panel meeting in July, we have another large Panel meeting today with $11.8M in projects and another $756,000 in Delegation Orders. I will also give you an update on the Fiscal Year (FY) 2015/16 funds as well.

Today we have a mix of single employer and multiple employer projects. Regional Office Managers Diana Torres, Creighton Chan, and Willie Atkinson are here today to present those proposals.

Regarding the budget for Alternative Fuels through the California Energy Commission, we started off this year with $2.8M. After last month’s approval of $1.3M in projects, we have approximately $1.5M remaining for this FY. Should the Panel approve all of today’s projects of nearly $500,000, we will have approximately $1M remaining. The $2M of drought funding has been completely encumbered and we were not allocated additional funds for the new FY.

In regards to CORE funding for FY 2015/16, to date, the Panel will consider an additional $11M in projects with another $756,000 approved by the Delegation Order. Should the Panel approve all the projects today, the Employment Training Panel (ETP) will have approximately $65M for the remainder of the FY.

Under the Delegation Order, Small Businesses were capped at $50,000 and other proposals were capped at $100,000 to be approved by the Executive Director on a continuous flow basis, and as of today, we have approved 21 projects totaling over $756,000 for this FY.

For the FY 2015/16 program funding, to date, we have approximately 457 projects submitted during the first and second round of applications, with a value of just over $64M. Financially we look very strong. The beginning of the year is always the big push and most of the larger projects are in.

In regards to the Fund Status Report for the FY 2015/16, we will bring you an updated version of the closeout in September. The ETP fund is at $76.2M and the projected contracting capacity is $90.6M; 38% encumbrance level. If all projects are approved today, we will have approximately $65M remaining for the FY 2015/16.

Potential funding of applications and demands by contracts are still in the regional offices. Single Employer Contracts request are at $40M; $38M in allocations. Multiple Employer Contracts (MECs) requests are about $11M in demand; $10.8M in allocations. Small Business is at $3.6M in demand; $5.9M in allocations. Critical Proposals is at $2.2M in demand; $3.9M in allocations. Apprenticeships are at $5.4M in demand; $7.4M in allocations. Overall demand is approximately $76M.

Regarding the number of projects remaining in the regional offices today: Single Employers 118, MECs 23, Small Business 88, Critical Proposal 6, Apprenticeships 10; total of 245. AAU by category: Single Employers 70, MECs 18, Small Business 42, Critical Proposals 1, Apprenticeships 14; total 145. Our staff is working diligently and doing a great job in getting those projects out in the regional office.
VI. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

Mr. Knox asked for a motion to adopt Consent Calendar Items #1 through #3.

Pacific Imaging Management LLC dba Radiology Associates .................................................. $151,068
Pandora Media, Inc. .................................................................................................................. $249,600
Riviera, Inc. dba The Enterprise U ......................................................................................... $205,300

ACTION: Mr. Rendon moved and Ms. McBride seconded the approval of Consent Calendar Items #1 through #3

Motion carried, 6 – 0.

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

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

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

Motion carried, 6 – 0.

VIII. REVIEW AND ACTIONS ON PROPOSALS

Single Employer Proposals

American International Industries, Inc.

Diana Torres, Manager of the San Diego Regional Office presented a Proposal for American International Industries, Inc. (American International) in the amount of $306,684. American International is a manufacturer and distributor of innovative beauty products for men and women. American International was founded in 1972 and is located in Commerce. The Company has nearly 40 brands of products that are sold to various retailers such as Walmart, Target, Walgreens, and CVS, as well as boutique and beauty supply establishments.

Ms. Torres introduced Charlie Loveless, Executive Vice President, and Ann Ervin, Director – Training Incentives, Tax Credit Company.

Ms. Roberts asked, what kind of beauty products do you carry? Mr. Loveless said, we carry men's and women's products, and we are the largest manufacturer of false eyelashes.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the proposal for American International Industries, Inc. in the amount of $306,684.

Motion carried, 6 – 0.
Fender Musical Instruments Corporation

Ms. Torres presented a Proposal for Fender Musical Instruments Corporation (FMIC) in the amount of $504,720. FMIC manufactures fretted instruments such as acoustic and electric guitars and basses, guitar amplifiers, and percussion products. FMIC’s customers are music retailers, mass merchants, online, catalog retailers, and third party distributors. FMIC’s worldwide end consumers include professional and amateur musicians and musical instrument collectors. This will be FMIC’s second ETP contract within the last five years.

Ms. Torres introduced Susan Rehm, Manager, Training, & Special Projects, and Dina Elias, Training Manager.

Mr. Broad asked, who do you have lined up to train for this round; are you using the same curriculum? Ms. Elias said, we have about 250 employees and 10 different departments in our Corona facility. The last half of the manufacturing process was trained; the first portion of that is close to 300 employees. Ms. Rehm said, we will be moving our marketing team from Scottsdale, Arizona to Los Angeles over the next contract term. We also plan on hiring another 40 to 50 people to come into that area.

Ms. Roberts asked, if they bring in employees from another state to work here in California, would that be considered new hires or job creation? Ms. Torres said, it would be under job creation if they are within that time.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the proposal for Fender Musical Instruments Corporation in the amount of $504,720.

Motion carried, 6 – 0.

Hyundai Capital America

Ms. Torres presented a Proposal for Hyundai Capital America (HCA) in the amount of $514,800. The Governor’s Office of Business and Economic Development (Go-Biz) have designated this project as a Critical Proposal. The Critical Proposal designation is based on HCA expanding within California through the addition of new jobs and plant expansion.

Formed in 1989, HCA, a subsidiary of Hyundai Motor America, is the finance arm of Hyundai Motor Corporation. Headquartered in Irvine, with operation centers in Dallas and Atlanta, HCA provides loan financing for two brands: Hyundai Motor and Kia Motor Finance.

Ms. Torres introduced Debbie Zang, Accounting Planning and Tax Reporting Director.

Mr. Rodriguez asked, what is the projected workforce for your Irvine site in the next five years? Ms. Zang said, we are projecting 105 new employees in the next five years. Mr. Rodriguez asked, are you relocating the financing division part to California; will you be manufacturing cars? Ms. Zang said, we do not manufacture cars in California. Hyundai Capital America is the finance arm of Hyundai Motor Corporation. We are supporting our parent companies, which are Hyundai and Kia Motor America. They are the primary
distributors. Mr. Rodriguez asked, where is your headquarters located? Ms. Zang said, our headquarters is in Irvine.

Ms. Roberts said, you hired Deloitte to assist you with your application. You have over half a million dollars at risk, who will be supporting you with the administration part of this project? Ms. Zang said, we plan to do it in-house, but we will hire Deloitte on a consulting basis. Ms. Roberts said, a tax consultant doesn’t usually take care of the administration part of all the roster collections and training. Since this is your first time, who would you have in-house from an infrastructure standpoint that will help you support this grant? Ms. Zang said, we have two groups that will be working together; me and a tax team. We have delegated managers who will be in charge of the program and will be working closely with training the department managers on this project. They will be dedicating their time to work with a team of four with our learning and development department. We also have a computer roster system to monitor all the training programs in order to submit the documentation for this training. Ms. Roberts said, when you mentioned learning and development department, that’s what I wanted to hear. Ms. Zang said, we have this California training grant available for our company; it’s the tax department that initiated the program.

ACTION: Ms. Roberts moved and Mr. Rendon seconded the approval of the proposal for Hyundai Capital America in the amount of $514,800.

Motion carried, 6 – 0.

Taylor-Listug, Inc. dba Taylor Guitars

Ms. Torres presented a Proposal for Taylor-Listug, Inc. dba Taylor Guitars in the amount of $428,440. Taylor Guitars is a privately owned manufacturer of high-quality acoustic and electric guitars. The Company was founded by Bob Taylor and Kurt Listug in 1974. Customers include major recording and performing stars such as Jewel, Jason Mraz, Taylor Swift, and Zac Brown. The Company is headquartered in El Cajon. This is Taylor Guitars second ETP project. The first Agreement was completed over 5 years ago.

Ms. Torres introduced Jo Ann Crabtree, Director of Training and Development.

Mr. Rodriguez said, there’s this huge fear that they guitars are being mass-produced across the Pacific. What’s your general perspective and plan to sustain what you have and grow? Ms. Crabtree said, our guitars are made 85% by hand and 15% using C & C Lasers for perfection. We are consistently making sure that our designs are not replicated by others. We definitely fight for what is ours and clampdown on counterfeits. No one else can build guitars like we do. Mr. Rodriguez asked, by buying large, do you have long-term workforce sustainability? Ms. Crabtree said, absolutely. If you were to look at the sustainability within our own craftsman, our average 10-year is 9.8 years. We just had four people retire from Taylor after 30 years of service. Our sustainability is really about the coaching and the reinforcement of the training. We have a minimum of 40 hours training for our employees each year.

Ms. Bell asked, what are you manufacturing in the Netherlands and Mexico plants? Ms. Crabtree said, in Mexico, they manufacture our lower end guitars. It’s what we call the “Baby
Taylor”, which is our 100 and 200 series. The 300 series all the way up and the exclusive guitars are manufactured in El Cajon.

**ACTION:** Mr. Rodriguez moved and Ms. Bell seconded the approval of the Proposal for Taylor-Listug, Inc. dba Taylor Guitars in the amount of $428,440.

Motion carried, 6 – 0.

**Ventura Foods, LLC**

Ms. Torres presented a Proposal for Ventura Foods, LLC (VFL) in the amount of $324,000. VFL was formed in 1996 as a joint venture between CHS, Inc. and Mitsui & Company, LTD. Headquartered in Brea, the Company manufactures food condiments such as margarine, mayonnaise, salad dressings, sauces, shortenings, soup bases, and cooking oils at 11 manufacturing facilities. This is VFL’s second ETP Agreement, the previous being over five years ago.

Ms. Torres introduced Jack Rose, Director Operations Finance.

**ACTION:** Ms. Roberts moved and there was a second on the approval of the Proposal for Ventura Foods, LLC in the amount of $324,000.

Motion carried, 6 – 0.

**BioMarin Pharmaceutical Inc.**

Mr. Creighton Chan, Foster City Regional Office Manager presented a Proposal for BioMarin Pharmaceutical Inc. (BioMarin) in the amount of $843,300. BioMarin has been designated a Critical Proposal by the Governor’s Office of Business and Economic Development (GO-Biz) based on the company’s planned expansion and commitment to adding jobs in California.

Mr. Chan introduced Kevin DuArte, Manager Compliance Training, Marty Richard, Executive Director of Compliance, and Gudrun Finn, Associate Director of Compliance.

Mr. Rodriguez said, there was a report by Bloomberg that BioMarin may be bought out. Mr. Richard said, from the time I interviewed with the Company four years ago, those rumors have swirled around. I would have to default to “no comment” which is the standard response to that. Mr. Rodriguez asked, so is there a possibility that you can be bought out and moved overseas? Mr. Richard said, no comment. I am not authorized to address those questions, and even better, I don’t know the answer.

**ACTION:** Ms. Roberts moved and Ms. Bell seconded the approval of the proposal for BioMarin Pharmaceutical Inc. in the amount of $843,300.

Motion carried, 6 – 0.
Cepheid

Mr. Chan presented a Proposal for Cepheid in the amount of $569,640. This proposal has been designated a Critical Proposal by the Governor’s Office of Business and Economic Development (GOBiz). They are expanding facilities in California. In this proposal, Cepheid seeks ETP funding to train 403 currently employed and 84 new employees.

Mr. Chan introduced Tamanna Prashar, Senior Director Consumable Operations, and Stephanie Smith, Senior Manager Operations Improvement Initiatives, and Phil Herrera, Consultant, Herrera and Company.

ACTION: Ms. Bell moved and Ms. McBride seconded the approval of the proposal for Cepheid in the amount of $569,640.

Motion carried, 6 – 0.

Triage Consulting Group

Mr. Chan presented a Proposal for Triage Consulting Group (Triage Consulting) in the amount of $473,540. Triage Consulting offers client hospitals a comprehensive review service.

Mr. Chan introduced Danielle Crawford, Principal, Erica Missildine, Principal, and Ann Ervin, Director Training Incentives, Tax Credit Company.

ACTION: Ms. Roberts moved and there was a second on the approval of the proposal for Triage Consulting Group in the amount of $473,540.

Motion carried, 5 – 0.

( Mr. Rodriguez stepped away from the dais and was not present to vote from Tab 11 through Tab 21.)

ProTransport-1, LLC

Willie Atkinson, Sacramento Regional Office Manager presented a Proposal for ProTransport-1, LLC (ProTransport) in the amount of $528,450. ProTransport is a leading provider of nonemergency inter-facility ambulance services for patients and healthcare facilities throughout the Bay Area and Central Valley.

Mr. Atkinson introduced Jess Daniel, Training Manager, Belinda Lowder, Director of Clinical Operations, Bill Parker, Consultant, National Training Systems

Ms. Roberts asked, do you provide medical transport through helicopters? Ms. Lowder said, we only offer ground transportation. Ms. Roberts asked, do you train any of your employees through Department of Transportation (DOT) training? Ms. Lowder said, we have a training called Emergency Vehicle Operations Course (EVOC). We’re hoping to utilize the funds to train our staff through EVOC; there are certain counties that require EVOC training before we
can put our employees behind the wheel and operate an ambulance. Ms. Roberts asked, what is ICD 10? Ms. Lowder said, ICD 10 stands for International Code of Diseases. ICD is a billing classification code for every disease diagnosis. ICD-9 was the previous version and it had 6000 codes; ICD 10 has 16,000 codes. Medicare, CMS, and Medicaid require clear and specific details for billing. In order to be properly reimbursed, we are required to use the specific ICD 10 code and an explanation as to why the patient was transported.

**ACTION:** Ms. Roberts moved and Ms. Bell seconded the approval of the proposal for ProTransport-1, LLC in the amount of $528,450.

Motion carried, 5 – 0.

**Multiple Employer Contracts**

**El Camino Community College District, Center for Applied Competitive Technologies**

Ms. Torres presented a Proposal for El Camino Community College District, Center for Applied Competitive Technologies (El Camino CACT) in the amount of $488,796. El Camino CACT is a two-year community college offering academic and vocational education programs. El Camino CACT is a repeat MEC with both core funded and alternative funded Agreements.

Ms. Torres introduced Eldon Davidson, Director of Customized Education.

Mr. Broad asked, is the transportation buses or trucks? Mr. Davidson said, it’s a combination of buses, trucks, and trains. It’s mostly transits and the Bay Area Rapid Transit (BART) System is involved with this training. We’re looking more at private fleets, that’s the reason why we interjected the Automotive Service Excellence (ASE) Certification.

**ACTION:** Ms. Roberts moved and Mr. Rendon seconded the approval of the proposal for El Camino Community College District, Center for Applied Competitive Technologies in the amount of $488,796.

Motion carried, 5 – 0.

**Studio Arts, Ltd.**

Ms. Torres presented a Proposal for Studio Arts, Ltd. (Studio Arts) in the amount of $899,608. Studio Arts is a private training company for high-tech, computer-based software and hardware for the motion picture, television and post-production industries located in Los Angeles. This is Studio Arts fifth ETP proposal.

Ms. Torres introduced Eric Huelsman, President.

Mr. Broad said, Mr. Knox, maybe the staff should reach out to Amy Lemisch, Executive Director of the California Film Commission. I don’t know that we are making enough effort to keep the film production in California, including last year, passing a massive increase in the film production tax credit that they administer. I don’t know if the industry is generally aware
of how we’ve been supporting the film industry as a priority industry; trying to upgrade the skill of the workforce in California so it’s attractive to film in our state. So maybe when the film commissioner is talking about what California does, they can mention ETP and we can be part of that. Mr. Knox said, we can certainly do that.

Mr. Huelsman said, without this program, the little companies that I service, under 50 employees, wouldn’t have a shot in getting the training that they need to compete with all the larger companies, like Prime Focus out of India, which is now here in Southern California. The competition is fierce, it is everywhere, and what we’re going through is horrible. I think that with more money coming into proposals, like the assembly bill we had last year, it might help some. It seems to help put a few things in the right direction. I would like to encourage the Panel, by what I seen as a pick up in work in the Los Angeles area, based on back filming if you will, from lost production jobs in the past by companies such as Amazon, Google, YouTube, Netflix, and other production companies; they are starting to flourish when they were once going away. Places like New Orleans, for example, are becoming unenamored with the tax credit, what they’re doing to their own local industry, and the taxpayers are disgruntled about having to pay for it. All in all I think that we see very bright skies ahead and I think that we are going to do well. We need to continue this training because even though we have NBC Universal and other companies that are quite large that are participating, it’s the little guys, 50 or under employees would really benefit a great deal from it.

ACTION: Ms. Roberts moved and Ms. McBride seconded the approval of the proposal for Studio Arts, Ltd. in the amount of $899,608.

Motion carried, 5 – 0.

Alameda County Electrical Industry Apprenticeship and Training Trust

Mr. Chan presented a Proposal for Alameda County Electrical Industry Apprenticeship and Training Trust (Alameda Electrical Trust) in the amount of $492,740. Alameda Electrical Trust is a joint labor management organization, founded in 1946 to provide high quality and up-to-date training in electrical inside wiring for Apprentice, Pre-Apprentice and Journeyman members of International Brotherhood of Electrical Workers (IBEW) Local 595. A Board of Trustees comprised of four labor representatives and four management representatives representing an estimated 346 employers govern the Trust.

Ms. Chan introduced Byron Benton, Training Director and Jan Borunda, Project Coordinator, California Labor Federation.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the proposal Alameda County Electrical Industry Apprenticeship and Training Trust in the amount of $492,740.

Motion carried, 5 – 0.
Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund

Mr. Chan presented a Proposal for Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund (Bay Area Roofers) in the amount of $299,250. Bay Area Roofers is a joint trust serving three apprenticeship programs. It is funded through collective bargaining between signatory employers with the Associated Roofing Contractors of the Bay Area Counties, Inc., and three union locals of the United Union of Roofers, Water proofers, and Allied Workers: Local 40 West Bay Counties, Local 81 East Bay & North Bay Counties, and Local 95 Santa Clara Counties. Each Union local has its own collective bargaining agreement and its own Joint Apprenticeship Training Committee (JATC).

Mr. Chan introduced Daniel Smith, Training Director, and Steve Duscha, Consultant, Duscha Advisories.

ACTION: Ms. Roberts moved and Ms. McBride seconded the approval of the proposal for Bay Area Counties Roofing and Waterproofing Industry Apprenticeship Training Fund in the amount of $299,250.

Motion carried, 5 – 0.

San Francisco Electrical Industry Apprenticeship and Training Trust

Mr. Chan presented a Proposal for San Francisco Electrical Industry Apprenticeship and Training Trust (SF Electrical JATC) in the amount of $670,400. SF Electrical JATC is a cooperative effort between the San Francisco Chapter of the National Electrical Contractors Association (NECA) and the International Brotherhood of Electrical Workers (IBEW) Local Union 6. SF Electrical JATC serves approximately 398 Apprentices and 1,200 Journeymen.

Mr. Chan introduced Steve Powers, Director, San Francisco Electrical.

Mr. Broad said, I sat down with some people from Phillips Electronics, and they were basically saying that light bulbs don’t burn out because of controlled lighting. Are you seeing a lot of new work in the area of light control? Mr. Powers said, lighting control has advanced so much. Lighting used to be controlled through the light switch; now it’s controlled by the sun. When the sunshine hits the building, the lights automatically dim. We maintain the same kind all the time. These new lights last longer. The work that goes into maintaining them, in the beginning, was very extensive. It’s a big change. If you recreate 10% of your floor, you have to redo all your lighting to a dimming system and add motion sensors.

ACTION: Ms. Roberts moved and Mr. Rendon seconded the approval of the proposal for San Francisco Electrical Industry Apprenticeship and Training Trust in the amount of $670,400.

Motion carried, 5 – 0.
Santa Clara County Electrical Joint Apprenticeship and Training Trust

Mr. Chan presented a Proposal for Santa Clara County Electrical Joint Apprenticeship and Training Trust (Santa Clara Electrical JATT) in the amount of $557,600. The trust is funded through collective bargaining between signatory employers that are members of the National Electrical Contractors Association (NECA) and the International Brotherhood of Electrical Workers (IBEW) Local 332.

Mr. Chan introduced Chap Powers, Training Director.

ACTION: Ms. Roberts moved and Mr. Rendon seconded the approval of the proposal for Santa Clara County Electrical Joint Apprenticeship and Training Trust in the amount of $557,600.

Motion carried, 5 – 0.

State Building & Construction Trades Council of California

Mr. Chan presented a Proposal for State Building & Construction Trades Council of California (SBCTC) in the amount of $639,720. SBCTC proposes to retrain journeymen and apprentice construction trades workers to support California’s energy efficiency goals and Project Labor Agreement (PLA) initiatives.

Mr. Chan introduced Jeremy Smith, Training Director.

ACTION: Ms. Roberts moved and Ms. Bell seconded the approval of the proposal for State Building & Construction Trades Council of California in the amount of $639,720.

Motion carried, 5 – 0.

The Corporation for Manufacturing Excellence

Mr. Chan presented a Proposal for The Corporation for Manufacturing Excellence (Manex) in the amount of $949,912. Manex, founded in 1995, and headquartered in San Ramon, provides business improvement services to manufacturers.

Mr. Chan introduced William Brown, Director of Workforce and Economic Development.

ACTION: Ms. Roberts moved and Ms. McBride seconded the approval of the proposal for The Corporation for Manufacturing Excellence in the amount of $949,912.

Motion carried, 5 – 0
Carpenters Trainings Committee for Northern California

Mr. Atkinson presented a Proposal for Carpenters Trainings Committee for Northern California (CTCNC) in the amount of $949,902. CTCNC is the educational organization that provides Pre-Apprentice, Apprentice, and Journeyman training services for union carpenters across 46 northern and central California counties.

Mr. Atkinson introduced Paula Resa, Director of Training Services, and Steve Duscha, Consultant, Duscha Advisories.

ACTION: Ms. Roberts moved and Ms. McBride seconded the approval of the proposal for Carpenters Trainings Committee for Northern California in the amount of $949,902.

Motion carried, 5 – 0

IX. No More Barriers

Maureen Reilly, General Counsel

Today, we will invite the Panel to consider a new program for ETP funding that fosters job creation and retention in full-time employment for persons with disabilities: No More Barriers.

No More Barriers will provide individuals with disabilities the training that they need to get hired in today’s workplace. Basically, this program is outreach. We are not changing the parameters of the existing program known as Job Creation. We hope to accomplish three central policy goals: Pay It Forward, Paying Back, and Forward Looking.

1. Pay It Forward – Critical Proposal Status

This program will confer the equivalent of Critical Proposal status and reward the employers the same way we reward companies that invest in new equipment or expansion of facilities. Critical Proposals status will allow the highest funding priority for expedited eligibility determination and development. Funding for this program will be capped and allocated pertinent to contract type per Fiscal Year (FY).

No More Barriers will recognize the value-added to both employer and community when persons with disabilities workers are hired into permanent full-time jobs. We're paying it forward in the sense when persons with disabilities can also be recognized as persons with abilities that right now aren’t being tapped in the workforce. We are hoping to invest in this body of talent by providing the training that is needed for them to be hired into permanent full-time jobs with some of the largest companies in California.

No More Barriers will also recognize that employers may encounter significant costs related to training and retaining workers with disabilities, and frequently create or adapt positions as needed to accommodate the disabling condition. This concept allows ETP to “piggyback” onto the successful Job Creation program.
The Job Creation pilot launched in January 2011, and ETP has served some 93 employers, training 3,415 workers with payment earned averaging 75%. Since we are imprinting on top of Job Creation, this new program will only apply to a Single Employer Contract (SEC) in the initial year. The key incentive that we will offer through this program is that the trainees will be eligible for the new hire wage and the new hire rate. The new hire wage is lower than the retraining wage, and the new hire rate is higher than the retraining wage, which is a sizable incentive. There is no substantial contribution for that particular group of employees when we have a repeat contractor. There is no turnover rate penalty, and there will be other incentives that will be available to encourage the employers to hop into Job Creation.

2. Paying Back – Employer Commitment

The program is designed for employers in California that have already made a commitment to hire individuals with disabilities, whether or not they need Section 503 Compliance. (See Rehabilitation Act of 1973 as amended in 2013.)

ETP eligible employers that hire disabled workers will qualify for funding under the new program regardless of whether they hold federal contracts. The employers must commit to bring in 7% of the workforce on that federal contract as a person with disabilities.

Individuals With Disabilities (IWD)

The industry sectors across the board are going to be largely priority industries. Most employers that hold federal contracts are in ETP priority industry sectors. For Section 503 Compliance these employers must recruit, hire, and promote IWD at 7% of the “job group” assigned to the federal project that is under contract. IWD will have to fit in the Job Creation within the pilot so that person will have to have been hired within the window period.

As part of the program, we will use a separate Job Number, because the newly hired Job Creation incentives will only apply to the individuals with disabilities. We will train alongside the incumbent workforce and the human resources department will be working alongside in a separate job number; we will train other incumbent workforce just as we always do under one contract.

The federal Office of Management and Budget (OMB) is making an effort to contract directly with small businesses instead of always having them come in as a subcontractor. For small businesses, the Section 503 Compliance requirements apply, except they are the 7% of workforces measured across the entire company, not just for the people working on that particular federal job.

For purposes of Section 503 outreach, the OMB allows workers to “self-certify” using a simple online form that identifies 18 qualifying disabilities. This includes Veterans suffering from Post-Traumatic Stress Disorder. ETP will accept this certification.

Human Resources staff, managers, and supervisors overseeing disabled workers will also be eligible for training under a separate Job Number. In keeping with the commitment to hiring
disabled workers, employers must pay wages during all hours of ETP-funded training as form of In-Kind Contribution.

3. Forward Looking: Partners

ETP will be working in concert with other government programs that offer financial incentives to employers for hiring and training persons with disabilities. We are encouraging the Panel to recognize that even though other forms of funding may be available, such as tax credits for business expansion, administered by the Governor’s Office of Business and Economic Development (GOBiz), or hiring incentives, or even a wage stipend that’s a temporary stipend, the employer will still be making a significant investment in these training programs. As GOBiz develops Critical Proposals for economic expansion, we will now be bringing out critical proposal status for investment in human resources. It will be a fairly focused marketing program.

Supplemental Funding

ETP funding cannot be used to displace other government programs, pursuant to the requirement for Supplemental Funding in Unemployment Insurance Code Section 10200(a)(c). Traditionally, the Panel would require an employer’s representation that ETP funding will not displace another such program. In keeping with the overarching policy interest in full employment for persons with disabilities, the Panel could acknowledge that the various programs will supplement each other.

Department of Rehabilitation (DOR) Partnership

No More Barriers will be implemented in partnership with the DOR. The DOR will assist us with the outreach. They have several regional offices up and down the state with trained staff specifically dedicated to work with employers that have the Section 503 Compliance needs.

According to DOR, some 20,000 employers in the State of California hold federal contracts. These companies range in size from over 100 employees to multinational. They must all reach Section 503 Compliance goals.

State Directive for Workforce Innovations and Opportunity Act WIOA

Employers may benefit from career and training services funded by WIOA for adult participants. These services are prioritized to each recipient of public assistance; other low-income individuals, and persons who are deficient in basic skills.

For purposes of administering WIOA funds, the Employment Development Department (EDD) has defined “priority” to mean at least 51% of participants must be either low-income, recipients of public assistance, or basic skills deficient. This does not negate WIOA priorities for serving Veterans.

ETP will coordinate with the California Workforce Development Board (CWDB) and local boards to fund training for employers that hire persons with disabilities. As such, the goals of No More Barriers are consistent with the State of California directives under the WIOA.
Marketing

The ETP Economic Development Unit (EDU) will work closely with DOR to create a focused marketing campaign for the new program. ETP will also support development by other marketing partners and consultants.

Mr. Broad said, I want to make sure that we’re drawing a distinction between outreach to people with disabilities and sheltered workshops. I don’t want our funds going to sheltered workshops. Sheltered workshops are places where people with disabilities are gathered. Generally they’re people without disabilities working there, and they are entitled to be paid a sub minimum wage. That’s problematic for me, because sometimes they can be paid subminimum wage, but there’s profit made. I want to encourage the people with disabilities to be recognized for contributing just like anybody else. There is a whole separate issue when somebody has a severe mental disability, and they cannot function in the workforce. Our program should focus on people coming into businesses that are predominantly composed of people without disabilities, but where we’re giving some assistance and encouragement, and that’s what we’re saying here. We could potentially have 100 people with disabilities bussed in the morning and leave in the afternoon, pay them a $1.45 per hour, and request additional funding. That is a significant distinction. I want us to recognize that that’s not consistent with our mission. Our mission should be about helping people with disabilities get into the mainstream workforce and get paid like everybody else in the mainstream.

Ms. Reilly said, we have the same wage requirement as we do for newly hired employees in our Job Creation program. We’re certainly not going below that. The idea here, with the 7% requirement for Section 503 Compliance, is that individuals are being brought into work as part of the team; you’re working together in fulfillment of those contractual requirements whether you are building a bridge, designing an electrical system, or whatever it may be. There is a wide variety of industry sectors holding federal contracts in California. Thank you Mr. Broad, that’s a very good point and I’ll make note of that.

Launching

Ms. Reilly said, we recommend that this program launch on October 1, 2015, which gives some time to ramp up and work with the DOR. We also recommend, for any companies that have Section 503 Compliance, and that came to us for 2015/16 Fiscal Year, that they be invited to take on a contract amendment, with or without additional funding as may be necessary and add this Job Number so that within this FY we will be able to have the largest outreach possible, even though the guidelines and so forth will begin as of October 1, 2015.

Ms. Roberts asked, I know this focused a lot on federal contracts, but we work for large private employers. We want to do the right thing and hire individuals with disabilities. There are no databases that we can go to; we can’t ask individuals to self-identify when they come on board if they have a disability or not. This could be a problem for private industry to get a disabled person. We can go to EDD and ask if they have persons with disability that we can bring on board, but it’s difficult for private industry to get the same consideration as federal companies that are under Section 503 Compliance.
Ms. Reilly said, we will be hearing from Bill Moore shortly. One of the interesting things about partnering with the DOR, they’re looking at it from the other side as they try to place their customers who are persons with disabilities who are seeking full time employment. I believe they have information about how to find eligible candidates for our program. This is not just from employers with Section 503 Compliance needs, but any employer that has a program or outreach to hire individuals with disabilities. Hopefully we can work together to share, exchange data.

Ms. Roberts said, we use the word able and this means come in and help with our business needs, but they are not full-time employees.

Ms. Reilly introduced William Moore, Deputy Director, Department of Rehabilitation.

Mr. Moore said, thank you for having me. I’m the Deputy Director of the Department of Rehabilitation, Employment Division. I started my career with the DOR many years ago as a counselor where I worked directly with consumers with disabilities to help them to attain employment. I worked as a counselor, supervisor, district administrator, assistant deputy and now deputy of our employment division.

DOR is very pleased to have this opportunity to partner and work with ETP and to support No More Barriers because it reflects the mission of the DOR. Our mission focuses on employment, independence, and equality for Californians with disabilities, and advocacy with partners in the community with persons with disabilities. We provide services to help them to obtain Competitive Integrated Employment (CIE). WIOA focuses on and promotes CIE; it places severe limitations on sheltered work employment. CIE is in harmony with the DOR missions and goals.

Mr. Broad said, if we use the term Competitive Integrated Employment, will we then make it very clear what we’re talking about? Mr. Moore said, absolutely. We refer to it as CIE, Competitive Integrated Employment. It means that persons with disabilities are earning wages competitive with individuals who do not have disabilities, and they are working in an integrated setting.

Mr. Broad said that’s the essence of my concern. As someone who represents labor, I worry about the people that work in sheltered workshops who would otherwise get no work. I am also concerned that we may be fundamentally exploiting them. It’s not our mission. There may be a place for that, but there’s no place in our funding for that. Mr. Moore said, I really think that with WIOA, it really changes the perspective on sheltered employment. We work with approximately 100,000 consumers with disabilities annually. There is no problem with identifying individual consumers with disabilities.

The DOR works with high schools, multiple agencies in the community, in regards to referring individuals to us who have physical and learning disability problems, mental health issues, developmental disabilities; we work with all individuals with disabilities.

Ms. Roberts asked, are these individuals with temporary or permanent disabilities? Mr. Moore said, these are consumers with permanent disabilities. We do not focus on their
disability, but we focus on their strengths on what they can do. There are a lot of
misconceptions about people with disabilities and their abilities to work.

Mr. Moore said, we have over 500 qualified rehabilitation counselors with Masters’ degrees,
and we have approximately 100 employment coordinators. Our staff works directly with
employers throughout the state of California. We have approximately 85 offices located
throughout the state, and we have various relationships with multiple employers throughout
the state in working with persons with disabilities. We are excited about this opportunity to
work with ETP.

Mr. Broad said, I am interested in helping individuals who were injured on the job through no
fault of their own. They go through the workers compensation system, and at the end of the
process, they have a permanent disability. They are not individuals who start off with a
disability; these are individuals who wind up with a disability. One of the biggest barriers for
them is getting back to employment, having alternative employment, and modified work at
their previous place of employment. Is there any way we can to reach out to the
administrative director of the workers compensation division, or the Department of Industrial
Relations and see if there’s something we can do? I know this from my experience; the best
outcome for the worker is for them to get back to work, and not to be disabled at home. The
best result for their lifetime is to get them back to work with their employer. If there’s some
part of this that we can do and be a part of No More Barriers, I think we should at least look
at it.

Mr. Moore said, we certainly work with individuals who have been injured on their jobs. As I
mentioned there is no discrimination with the DOR. We work with individuals who have been
injured in their job in order for them to return to work. They need special accommodations
sometimes to help them return to do their job, and most times those accommodations are not
too expensive. That’s the role of the counselor, to work with the individual to determine what
their needs are in order to return to CIE. Many times it’s with the employer that they’re
already employed with.

Mr. Broad said, consider an example, let’s say an employer takes someone back and they’re
making a substantial financial investment in some kind of equipment. In order to
accommodate someone, maybe we can pay for the specialized training for the worker to use
that equipment, if it’s not already covered under the workers compensation system or
supplemental to it. I think would be greatly beneficial. So in order to get an individual back to
work and there’s a $20,000 solution, but there’s a much better $50,000 solution which
requires a lot more training, that’s where we can come in and cover the training, if you
choose to go with the better solution for the worker that does more for them.

Mr. Moore said that’s where the DOR can collaborate with ETP and with the employers to
help identify what that employee needs and determine what other accommodations are
needed to have that employee return to work and be a productive worker. Yes, you are right
on, and because of our relationships with the employers throughout the state, we are
certainly in a position to advocate and promote the No More Barriers. As Ms. Reilly stated,
there over 20,000 employees that have federal contracts, but we also work with California
employers who do not hold federal contracts. Partnering with ETP will help us move forward
with our Director, Joe Xavier. For those of you who may not know our Director, he is a
person with disability. He is visually impaired and he is one of the best directors we’ve had at the DOR. His vision is now our goal, which is to employ 20,000 consumers receiving $20 an hour by the year 2020. Persons with disabilities, they want to enjoy the same pleasures of life that we all have the opportunity of enjoying, and that is really the work, not sheltered employment, but meaningful work that’s done through CIE. We are here to support No More Barriers. Thank you for providing us with this opportunity, we truly appreciate it.

Mr. Broad said, speaking for the Panel, I really think this is a great idea, and I really appreciate it. I’m excited about this. I would like for this to move forward and really do something for people, and I appreciate your department’s willingness to collaborate with ETP and hopefully we can do something here.

Mr. Moore said, we look forward to the collaboration.

Ms. Reilly said, staff recommends approval of No More Barriers with the features outlined in the memorandum effective October 1, 2015. Staff also recommends that No More Barriers be allowed as an amendment for contracts funded as of July 1, 2015, as may be applicable, on a retroactive basis and the additional modification recommended by Mr. Broad.

ACTION: Ms. Roberts moved and Mr. Rodriguez seconded the approval of the program, No More Barriers.

Motion carried, 6 – 1.

X. Public Comments

There were no public comments.

XI. MEETING ADJOURNMENT

Meeting adjourned at 11:42 am.
Single Employer Contractor

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

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

These features apply to core program funding.
Multiple Employer Contractor

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

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

Retraining

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

New Hire Training

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

These features apply to core program funding.

August 20, 2015
Delegation Order Process

- The Panel has delegated authority to the Executive Director, without consultation with the Panel Chair, to approve (1) small business (100 or fewer employees) for $50,000 or less, and (2) single and multiple employer proposals for $100,000 or less.

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

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

- A copy of approved Delegation Orders is included in each month’s Panel Packet, for projects approved prior to the Panel meeting, as an information item.
Training Proposal for:
ALLDATA, LLC
Agreement Number: ET16-0203

Panel Meeting of: September 25, 2015
ETP Regional Office: Sacramento          Analyst: W. Sabah

PROJECT PROFILE

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<td>Priority Industry:</td>
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<tr>
<td>Repeat Contractor:</td>
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<td>Union(s):</td>
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Number of Employees in: CA: 3000  U.S.:56,000  Worldwide: 70,000

Turnover Rate: 10%
Managers/Supervisors: (% of total trainees) 10%

FUNDING DETAIL

Program Costs: $144,000

(Substantial Contribution): $0
(High Earner Reduction): $0

Total ETP Funding: $144,000

In-Kind Contribution: 100% of Total ETP Funding Required: $280,000
TRAINING PLAN TABLE

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<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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<td>Business Skills, Computer Skills, Continuous Impr, Mgmt Skills</td>
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<td>8-200 0-20</td>
<td>$720</td>
<td>$15.75</td>
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Minimum Wage by County: Sacramento County $15.75 per hour

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

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

Up to $0.75 per hour may be used to meet the Post-Retention Wage.

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<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
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<td>Technical Support Staff</td>
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<td>Quality Analyst I</td>
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<tr>
<td>Quality Analyst II</td>
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<td>Production Staff</td>
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INTRODUCTION

Founded in 1986 and located in Elk Grove, ALLDATA, LLC (ALLDATA) is an online provider of Original Equipment Manufacturer service, repair information, shop management software, parts estimating and ordering tools, marketing applications, and tools to help customers locate and schedule appointments for professional automotive service. Customers include collision shops, mechanical repair shops, large scale dealerships, and do-it-yourself individuals. The Company is a subsidiary of AutoZone, Inc.

ALLDATA has online tools to handle situations from attracting new customers to ordering parts electronically. Available online 24/7, the database offers customers information covering 33,000 engine-specific vehicles.
This proposal was originally approved by the Panel at its meeting on June 27, 2014, for funding in FY2014/15. However, the ETP Agreement was never executed due to business needs on the part of ALLDATA. This proposal is identical to the original but for the fact that wages have been updated from FY2014/15 to FY2015/16. [Note: Funding was not encumbered last FY because the original contract was not executed. Funding will be encumbered this FY in conformity with standard Fiscal procedures.]

PROJECT DETAILS

ALLDATA is in the process of introducing a new generation of software, such as Smartlogic and Alfresco, Oracle Database MySQL, and Xamarin, to reshape its current business and transition into a true technology company. To facilitate this change, the Company must increase the scale and speed of its online fulfillment network. These upgrades will allow a more robust management of data, encoding, and data warehousing. Employees will require training on new updates to gain efficiency, troubleshoot, maintain, and streamline operating procedures for maximum productivity.

Training Plan

ALLDATA’s training and development team is committed to being successful on this ETP-funded training. The training plan includes Class/Lab and Computer-Based Training.

Business Skills (30%) Training will be offered to Frontline Managers, Quality Analysts, Engineers, Inside Sales Staff, Marketing Staff and Technical Support Staff. Training will focus on communication skills, accountability, and team alignment concepts.

Computer Skills (40%) Training will be offered to Frontline Managers, Quality Analysts, Engineers, Inside Sales Staff, Marketing Staff and Technical Support Staff. This training is intended to assist staff to become more proficient in the use of various business software solutions (i.e. internal customer applications, Microsoft Office, data warehouse management software, and internet applications). Technical Support Staff and Quality Analysts will learn computer networking, database administration, software systems, and web hosting. Sales/Marketing Staff will learn internet marketing and related online applications.

Continuous Improvement (20%) Training will be provided to all occupations. The training modules will focus on equipping workers with the skills necessary to improve productivity and implement new processes.

Management Skills (10%) Training will be provided to Managers only. The training will focus on management skills training for newly promoted managers to effectively supervise, motivate, lead, and manage performance/productivity.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company spends $30,000 annually per facility in California for orientation, basic computer skills, internet navigation, and anti-harrassment training.
Impact/Outcome

Training will assist ALLDATA to:

- Implement new software and programs
- Improve efficiency and quality
- Increase customer base

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

ALLDATA retained ADP in San Dimas to assist with development of this proposal for a flat fee of $5,000.

ADMINISTRATIVE SERVICES

ALLDATA also retained ADP to assist with 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**
- Project Management
- Finance Basics
- Presentation Skills
- Time Management
- Business Writing
- Meeting Management
- ALLDATA Technical Product Support and Troubleshooting
  - ALLDATA Repair
  - ALLDATA Collision
  - ALLDATA Mobile
  - ALLDATA Manage – SMS
  - ALLDATA Market – CRM
  - ALLDATA diy
  - ALLDATA Training Garage
- Customer Service
- Sales

**COMPUTER SKILLS**
- Gen3 Tools
- Advanced MS Office
- Intermediate and Advanced MS Outlook
- I-CAR Collision
- Java/Python
- SW Systems Architecture
- Enterprise Service Bus
- VM Ware Horizons
- CompTIA Network+
- Fundamentals of Databases Using MySQL
- Installing and Configuring Windows Server 2012
- PC Computer Hardware
- Configuration Management
- Google Analytics Training for PO's
- HP ALM
- HP UFT
- HP Performance Center
- SOA Test
- HP Discover
- StarWest
- Big Data Repository / Publishing Technologies
- Mobile Solutions Design
CONTINUOUS IMPROVEMENT
- Critical Thinking, Business Case Development
- Team Acceleration
- Intelligent Content
- Planning
- Process Review and Continuous Improvement
- Continuous Improvement Methods
- How to Motivate Employees
- Constructive Conflict Resolution
- Coaching & Feedback
- How to Solve Inter-Departmental Differences
- Understanding Learning Styles, Personality Types
- How to Effectively Communicate Goals and Expectations
- Strategic Planning and Budget
- Leadership, Coaching, Strategy

MANAGEMENT SKILLS (For Managers/Supervisors only)
- Manager/Supervisor Training

CBT Hours
0-20

BUSINESS SKILLS
- ALLDATA Sales Resco Training (8 hours)
- Territory Management Planning (4 hours)
- Pipeline Management (4 hours)
- Product Training Certification Process (12 hours)
- Competitors - Products and Services Provided (4 hours)

COMPUTER SKILLS
- Advanced MicroSoft Office (Excel, Word, Powerpoint, Visio) (12 hours)
- ALLDATA Product User Interface and Features and How To (8 hours)
- Computer/Tablet OS and Basics (4 hours)
- SQL and JAVA (8 hours)
- MSD-CRM Training (8 hours)
- Diagnostics (8 hours)

CONTINUOUS IMPROVEMENT
- ALLDATA Sales Resco Training (8 hours)
- Territory Management Planning (4 hours)
- Pipeline Management (4 hours)
- Productivity Training (16 hours)

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

Amgen Inc.

Agreement Number: ET16-0163

Panel Meeting of: September 25, 2015

ETP Regional Office: North Hollywood  Analyst: M. Webb

PROJECT PROFILE

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<td>Counties Served:</td>
<td>Los Angeles, San Francisco</td>
<td>Repeat Contractor:</td>
<td>☑ Yes ☐ No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>☐ Yes ☑ No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 6,041</td>
<td>U.S.: 11,612</td>
<td>Worldwide: 16,325</td>
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<tr>
<td>Turnover Rate:</td>
<td>11%</td>
<td></td>
<td></td>
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<tr>
<td>Managers/Supervisors:</td>
<td>(15% of total trainees)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$198,000</td>
<td>$0</td>
<td>$0</td>
<td>$198,000</td>
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In-Kind Contribution: 100% of Total ETP Funding Required $366,300
Amgen Inc. September 25, 2015 ET16-0163

TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills</td>
<td>275</td>
<td>8-200</td>
<td>$720</td>
<td>$15.97</td>
</tr>
</tbody>
</table>

Minimum Wage by County: $15.97 per hour for trainees in Los Angeles County and $16.44 per hour for trainees in San Francisco County.

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

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

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

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Supp rt Staff</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Senior Corporate Support Staff</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Engineering/Information Systems Staff</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Senior Engineering/Information Systems Staff</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>Manufacturing Operations/Quality Staff</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Senior Manufacturing Operations/Quality Staff</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Research and Development Staff/Scientists</td>
<td>35</td>
<td></td>
</tr>
<tr>
<td>Senior Research and Development Staff/Scientists</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Managers</td>
<td>40</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1980, Amgen Inc. (Amgen) (www.amgen.com), alongside its wholly owned subsidiary, Amgen USA Inc., is headquartered in Thousand Oaks. The Company also operates a research and development facility in South San Francisco. Both locations will receive training under this Agreement.

Amgen is considered one of the first in its industry to provide safe and effective medicines by developing, manufacturing and delivering human therapeutics globally. Amgen products have helped change the practice of medicine helping millions of people in the fight against cancer,
kidney disease, rheumatoid arthritis, bone disease, and other serious illnesses. This will be the second Agreement between Amgen and ETP.

PROJECT DETAILS

Amgen’s prior Agreement (ET13-0315) focused on product development, sales and marketing training. This training will also be included in the new Agreement and will include previous course topics; however, these topics were only provided to a limited number of employees. In addition, content for these courses have been modified as of 2013 to meet new standards.

Amgen continues to develop new medicines as a solution to improve health outcomes. To increase advances in biotechnology, Amgen has embarked on new initiatives being implemented that include the following:

Potential of Late-Stage Product Pipeline - During the first half of 2015, Amgen launched three new products and three pipeline medicines under regulatory review as of July 2015. In addition, Amgen has three medicines in the works that are expected to initiate global submissions and advance clinical trials.

Participation in the Biosimilar Market in 2017 - Amgen is developing six biosimilar medicines expected to launch in 2017. Biosimilars are therapeutic alternatives for biologic medicines that offer potential for increased access and lower costs. Its complex structure and detailed production processes are shown on the basis of analytical, non-clinical and clinical data in relation to original biologics in terms of structural characteristics, safety, and efficacy.

Improved Drug Delivery Systems - Amgen has been approved to market its On-Body Injector for use of the drug Neulasta. Physicians will use the injector to administer Neulasta without requiring patients to return to the hospital following chemotherapy treatments. The injector represents Amgen’s ongoing commitment to provide patient-friendly medicine delivery methods. New products are underway that will continue to improve drug delivery systems (combination products). This will require the introduction of new skills, processes, comprehension, and collaboration to succeed.

Manufacturing of the Future - New manufacturing technologies are being implemented to handle increased levels of Amgen products at lower costs and improved delivery times. Amgen’s manufacturing facilities in California will receive training on new technologies currently used in other Amgen locations worldwide.

Training provided will increase product knowledge and lean manufacturing skills (Six Sigma); improve communication, team building, and marketing skills; and enhance employee skill set to develop and produce new medicines to further advances in biotechnology.

Training Plan

Amgen has developed an internal program to implement changes and opportunities that will affect frontline workers as it adapts to the overall transformation of the Company. Trainees will learn new skills to prepare them for recent changes in healthcare. Training will be delivered by in-house staff/instructors.

Business Skills (25%): Training will be offered to all occupations to increase staff product knowledge and customer service skills. Training provided will ensure best efforts towards designing, developing, producing, and selling new products by Amgen.

ETP 130 - Single (10/02/14)
**Computer Skills** (10%): Training will be offered to all occupations to ensure employees can utilize computer software and systems related to their job duties. Topics to be delivered include clinical data management, electronic lab notebook, and SharePoint.

**Manufacturing Skills** (40%): Training will be offered to Research and Development/Scientists, Engineering/Information Systems and Manufacturing Operations/Quality Staff. Training in topics such as bio statistical and clinical development skills will increase staff capability to develop new products and positively impact product life cycle.

**Continuous Improvement** (20%): Training will be offered to all occupations to improve company production planning, decision making, control processes, and project management. Training will increase efficiency, improve pace to market Amgen products, and provide quality products.

**Hazardous Materials** (5%): Training will be offered to Research and Development/Scientists, Engineering/Information Systems and Manufacturing Operations/Quality Staff. Trainees will receive training on chemical hygiene/safety for laboratories, waste management, hazard communication, and incidental radiation.

**LMS**

Staff has approved Amgen’s use of a Learning Management System for recordkeeping.

**Commitment to Training**

Amgen spends approximately one million dollars annually to train its California employees. Training provided includes basic job skills, introductory computer skills, orientation, workplace conduct and ethics training. Training is provided based on departmental need or specific job function.

Amgen represents that 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**

One staff member will manage the contract and work with ETP and the third party administrator. However, Amgen maintains a global training community and have designated staff members who will be responsible for administrative duties that include scheduling training and enrolling staff in the program. Amgen has also hired a third party, Training Funding Partners to provide administrative services.

**Green/Clean Technology**

Amgen is committed to utilizing environmentally responsible operations throughout its facilities. Company practices include processes that ensure low energy and water usage and reduces waste that meet green standards in the industry. Amgen has also been recognized by the U.S. Green Building Council and received a Leadership in Energy and Environmental Design Certification. In addition, Amgen continues to integrate environmental sustainable procedures in areas of its business through utilization of green products.

**RECOMMENDATION**

Staff recommends approval of this proposal.
PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0315</td>
<td>Thousand Oaks, San Francisco</td>
<td>6/27/13-6/26/15</td>
<td>$458,000</td>
<td>$198,301</td>
<td>(43%)</td>
</tr>
</tbody>
</table>

Although Amgen was able to deliver training to a majority of its training population, workers struggled to reach the 24-hour minimum hour requirement due to production demands, which prevented them from attending training as planned.

Amgen will continue to develop new medicines while also providing enough training to maximize earnings under the new Agreement. Training courses will be provided to staff at time frames that are conducive with employee availability. The Company has reduced its funding request to remain in accordance with the previous earning amount. A lower funding amount and minimum hour requirement will ensure Amgen will have higher performance in the following Agreement.

DEVELOPMENT SERVICES

Training Funding Partners in Fountain Valley assisted with development of this proposal for a flat fee of $19,500.

ADMINISTRATIVE SERVICES

Training Funding Partners will also perform administrative services in connection with this proposal for a fee not to exceed 11% of payment earned.

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Advanced Communication Skills
- Audit Management Skills
- Business Process Skills
- Business/Technical Writing Skills
- Cross-Functional Skills
- Customer Service/Support Skills
- Data Element/Standards
- Data Analysis/Monitoring
- Facilitation/Train-the-Trainer Skills
- Finance/Accounting Skills
- Global Order Processing Skills
- International Business Practices/Doing Business in Other Countries
- Negotiation/Influence Skills
- Product Knowledge/Development
- Product Commercialization Skills
- Sales/Marketing Skills
- Vendor Management Skills

**COMPUTER SKILLS**
- Clinical Data Management
- Database Management Skills
- Electronic Lab Notebook Skills
- Intermediate/Advanced Microsoft Office Skills iPad Application Skills for Scientific Affairs
- Learning Management System Skills
- Microsoft Project
- SharePoint Application Skills
- Spotfire Data Viewing Tool
- TrackWise Enterprise Quality Management Software Application Skills
- Waste Reporting Tool

**CONTINUOUS IMPROVEMENT**
- Change Management Skills
- Conflict Management/Resolution Skills
- Decision Making Skills
- Leadership Development Skills
- Process Improvement/Productivity Skills
- Production Planning Process
- Project Management Skills
- Risk Assessment/Management Skills
- Quality Control/Quality Assurance Skills
- Six Sigma Skills
- Statistical Process/Analysis Skills
- Strategic Thinking/Planning Skills
- Team Building/ Collaboration Skills
- Troubleshooting Skills

HAZARDOUS MATERIALS
- Chemical Hygiene/Safety for Laboratories
- Hazardous Material Spill Response Team Training
- Waste Management for Laboratories
- Radiation Safety for Users/Supervised Staff
- Hazard Communication
- Incidental Radiation Training
- Hazardous Waste and Biowaste for Laboratories
- Storm Wage Discharges

MANUFACTURING SKILLS
- Advanced Safety Skills
  - Catastrophic Incident Response
  - Cold Exposure Awareness
  - Hot Work Safety
- Biomanufacturing Technologies
- Biosimilar Production Skills
- Biostatistics Production Skills
- Clinical Development Skills
- Cross-Functional Manufacturing Skills
- Engineering Skills
- Experimental Design Skills
- Failure Modes and Effects Analysis
- Interpretation and Reporting of Diagnostic Tests
- Manufacturing/Laboratory Skills
- Research and Development Skills

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:
Ares Operations LLC
Agreement Number: ET16-0179

Panel Meeting of: September 25, 2015
ETP Regional Office: North Hollywood  Analyst: E. Fuzesi

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainee Job Creation Initiative</th>
<th>Industry Sector(s):</th>
<th>Financial Services</th>
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<tr>
<td></td>
<td></td>
<td>Priority Industry: □ Yes  □ No</td>
<td></td>
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<tr>
<td>Counties Served:</td>
<td>Los Angeles</td>
<td>Repeat Contractor: □ Yes  □ No</td>
<td></td>
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<tr>
<td>Union(s):</td>
<td>□ Yes  □ No</td>
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<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 375  U.S.:674  Worldwide: 810</td>
<td></td>
<td></td>
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<tr>
<td>Turnover Rate:</td>
<td>4%</td>
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<tr>
<td>Managers/Supervisors:</td>
<td>(%) of total trainees 5%</td>
<td></td>
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FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
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<tbody>
<tr>
<td>$150,000</td>
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<td>$0</td>
<td>$150,000</td>
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In-Kind Contribution: 100% of Total ETP Funding Required $650,897
## TRAINING PLAN TABLE

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<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine</td>
<td>Business Skills, Computer Skills, Cont. Impr.</td>
<td>256</td>
<td>8-200</td>
<td>0-6</td>
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<td></td>
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<tr>
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<td>Retraine Job Creation Initiative</td>
<td>Business Skills, Computer Skills, Cont. Impr.</td>
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<td>$840</td>
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<td></td>
<td>Weighted Avg: 42</td>
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<td></td>
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</table>

### Minimum Wage by County:
- Job Number 1, Standard Retraine: $15.97 for Los Angeles County.
- Job Number 2, Retraine-Job Creation: $13.31 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

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1 (Retraine)</strong></td>
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<tr>
<td>Administration Staff I.</td>
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<td></td>
</tr>
<tr>
<td>Administration Staff II.</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>Administration Staff III.</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Administration Support Staff</td>
<td>56</td>
<td></td>
</tr>
<tr>
<td>Senior Administration Support Staff</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Client Support Staff I.</td>
<td>27</td>
<td></td>
</tr>
<tr>
<td>Client Support Staff II.</td>
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<td></td>
</tr>
<tr>
<td>Client Support Staff III.</td>
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<td></td>
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<tr>
<td>Client Support Staff IV.</td>
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<tr>
<td>Finance Staff I.</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>Finance Staff II.</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Finance Staff III.</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Legal Staff I.</td>
<td>8</td>
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<tr>
<td>IT Staff</td>
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<td></td>
</tr>
<tr>
<td>Manager I.</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Manager II.</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Manager III.</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1997, Ares Operations LLC (Ares) (www.aresmgmt.com) is a publicly traded, global asset management company specializing in the tradable credit, direct lending, private equity, and real estate markets. Headquartered in Los Angeles, Ares has seven additional US locations and is present in 10 countries, serving North America, Europe, and Asia. This will be Ares’s first ETP Agreement. The Company’s Los Angeles facility will participate.

Ares designs and builds investment products providing investors more diversification and investing options that match their declared financial objectives using a systematic process for deploying, operating, maintaining, upgrading, and disposing of clients’ funds. Are’s services include portfolio analysis, forecasting, investment advice, implementation of investing strategies, and performance analysis. Primary customers include; investors from large pension funds, university endowments, sovereign wealth funds, banks and insurance companies.

For the past few years, financial and investment industries have been under increasing federal and foreign state regulatory changes, resulting in an increase in mandatory report filings. In May, 2014 Ares became a publicly traded partnership. Ares now has new regulatory standards to abide by, impacting the majority of the core processes and systems. During this period of significant changes, Ares is in the process of reviewing and improving the core processes to increase value for customers that will, in turn, support growth. Ares’s growth strategy includes diversifying product and service offerings which add complexity to business operations.

In order to meet compliance and regulatory standards and gain capabilities that will support product expansion, Ares initiated several technology projects, processes and organizational changes. The proposed ETP training will allow the Company to operate to industry standards, meet customer requirements, as well as equip associates with the necessary skills to meet the changing environment of becoming a public company.

Retrainee - Job Creation

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

Ares has committed to hiring 14 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.
Ares Operations LLC
September 25, 2015

Ares is forecasting a 15% annual growth over the next two years across all business platforms. As such, Ares anticipates additional hiring and ongoing training, enabling them to expand and enter into new markets.

PROJECT DETAILS

Training will focus on developing staff’s understanding of core business processes and providing skill development specific to trainees’ roles and responsibilities. As regulatory compliance is becoming an important part of Ares’s business, learning these requirements will ensure compliance when audited. Training will be facilitated using Class/Lab and Computer-Based Training (CBT) methods. Consulting services will be employed where necessary skills or knowledge is not available in-house.

Training Plan

Business Skills (34%) – Training will be offered to all staff to complete tasks in a consistent and compliant way across all lines of business. As a result, Ares’s core processes will be scalable to support business growth plans. Effective Communication will improve employees’ competence in speaking, observation, listening and comprehension. Project Management skills will equip trainees for the challenges of the constantly evolving business environment, building a solid foundation of techniques and tools covering the entire project life cycle. Employees will be trained on the importance of project scope and gathering requirements, creation of project plans, assessment of project risk, and effective management of multiple projects.

Computer Skills (16%) – Training will be offered to all staff to learn to fully utilize the new software system, Oracle. Training will cover changes in workflow and processes to accommodate the new technology centralize and standardize processes, and implement controls for timely reporting to investors and the Company. Microsoft Office training will provide staff with essential skills in the latest applications to increase efficiency, functionality, and technical skills, making technical collaboration easier.

Continuous Improvement (50%) – Training will be offered to all staff to respond to continuing changes in the industry and customer requirements. This will enable Ares to systematically and efficiently adapt to customer and industry needs, reduce lead time and remain competitive in the long term.

Impact/Outcome

ETP funding will help the Company transition to a Lean business environment, engage in change management, and implement Oracle Fusion technology. Training is part of Ares’s retention strategy to demonstrate loyalty and commitment by offering employees the opportunity to learn and grow with the business, and support individuals’ long-term career goals. In order to grow efficiently, current and new processes need to be scalable. Associates will be trained to develop standard work for all business processes which will support new employee onboarding and compliance.
Commitment to Training

Ares represents that 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.

Ares’s training budget is $200,000 annually in California. This includes skills training such as communication, project management, continuous improvement, software application training, and negotiation skills. Other training also includes leadership training offered to managers and potential leaders to develop them for potential promotional opportunities. The proposed contract will allow Ares to formalize more training programs, improve content and structure, and reach a greater number of employees to make a significant impact on the operation.

➢ Training Infrastructure

Training will be orchestrated through the Human Resources and Transformation Departments. HR Managers will be responsible for collecting and filing the signed rosters. The Continuous Improvement (CI) Coordinator and HR Manager will be responsible for training team leaders and supervisors to properly follow the steps to document training using the proper forms and submit them to HR and CI Staff.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Ares retained The IM Group in Fairfield, CT to assist with development of this proposal for a flat fee of $2,875.

ADMINISTRATIVE SERVICES

Ares retained The IM Group in West Hollywood to perform administrative services in connection with this proposal for an amount not to exceed 13% of payment earned.

TRAINING VENDORS

PricewaterhouseCoopers of Los Angeles has been retained to provide Continuous Improvement training for a fee of $4,500. Other trainers will be identified for ETP record-keeping purposes, as they are retained by Ares.
Exhibit B: Menu Curriculum

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

BUSINESS SKILLS
- Effective Communication
- Management Training for Individual Contributors
- Negotiation Skills
- Project Management

COMPUTER SKILLS
- Microsoft Office Access (Intermediate/Advanced)
- Microsoft Office Excel (Intermediate/Advanced)
- Microsoft Office Outlook (Intermediate/Advanced)
- Microsoft Office Word (Intermediate/Advanced)
- Oracle Fusion

CONTINUOUS IMPROVEMENT
- ARES Management System
- Coaching, Leadership & Team Building
- Kaizen
- Lean Awareness
- Lean Principles
- Problem Solving
- Process Mapping
- Quality Tools
- Standard Work
- Strategy Deployment
- Value Stream Mapping
- Visual Metrics
- Waste Identification
- Workshop Management

CBT Hours
0-6

COMPUTER SKILLS
- Microsoft Office Excel – Advanced (1 hr.)
- Microsoft Office Excel – Intermediate (1 hr.)
- Microsoft Office Word – Advanced (1 hr.)
- Microsoft Office Word – Intermediate (1 hr.)
- Oracle Fusion (2 hrs.)

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.
Training Proposal for:

California Box Company

Agreement Number: ET16-0181

Panel Meeting of: September 25, 2015

ETP Regional Office: North Hollywood    Analyst: E. Wadzinski

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainee Priority Rate HUA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td>Manufacturing</td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>☒ Yes ☐ No</td>
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<tr>
<td>Counties Served:</td>
<td>Los Angeles, San Bernardino</td>
</tr>
<tr>
<td>Repeat Contractor:</td>
<td>☒ Yes ☐ No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>☐ Yes ☒ No</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>16%</td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>8%</td>
</tr>
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</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$182,880</td>
<td>$0</td>
<td>$0</td>
<td>$182,880</td>
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In-Kind Contribution: 100% of Total ETP Funding Required $189,124
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrained Priority Rate</td>
<td>Business Skills, Computer Skills, Continuous Impr, HazMat, Mfg Skills</td>
<td>61</td>
<td>8-200 0</td>
<td>$1,440</td>
<td>$15.07</td>
</tr>
<tr>
<td>2</td>
<td>Retrained Priority Rate HUA</td>
<td>Business Skills, Computer Skills, Continuous Impr, HazMat, Mfg Skills</td>
<td>66</td>
<td>8-200 0</td>
<td>$1,440</td>
<td>$11.98</td>
</tr>
</tbody>
</table>

Minimum Wage by County: Job Number 1: $15.07 per hour for San Bernardino County. Job Number 2: $13.31 per hour for Los Angeles County (Santa Fe Springs facilities/HUA).

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

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

Up to $3.87 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Number 1: Rancho Cucamonga Facility</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Machine Operators</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>Machine Assistants</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>Supervisors</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Designers</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Mechanics</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Customer Service</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Production Control</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Job Number 2: Santa Fe Springs Facilities (HUA)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Machine Operators</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>Machine Assistants</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>Supervisors</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Designers</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Mechanics</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Customer Service</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Production Control</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

California Box Company (CBC) (www.calbox.com), founded in 1994, manufactures and distributes customized corrugated boxes and sheets. The Company also fabricates corrugated pop-up and counter displays. Its customer base includes packaging contractors, distributors, jobbers, box plants, and other sheet plants.

CBC plans to use ETP funds to train its employees and also those of two closely-affiliated companies also doing business in California: CB Sheets, Inc. and California Box Company II. All companies are located in Santa Fe Springs and Rancho Cucamonga where training will take place. The contract will be structured as a Group of Employers. CBC will act as the lead employer holding the ETP Agreement.

PROJECT DETAILS

The proposed training will assist in skills and professional development to remain competitive. CBC plans to institute a continuous improvement strategy to advance production efficiencies, improve product quality, and reduce waste. Training will also focus on recently purchased, state-of-the-art technology which includes printers, software and machinery. The Company invested $2 million on new equipment to increase sales and support business.

Training Plan

This is CBC’s second ETP Agreement. Training in this Agreement will not duplicate ETP training provided to trainees in the first Agreement. Training for all three facilities in the first Agreement was minimal ($38,304) and focused on training for new equipment and preventive maintenance on existing equipment. Training in this Agreement will focus on the $2,000,000 in new equipment that were installed earlier this year, as well as on establishing new procedures as part of an ISO program to help standardize and document processes in order to increase service and sales.

Business Skills (10%): Training will be provided to Supervisors, Designers, Customer Service and Production Control Staff. Trainees will receive effective communication skills and sales and customer service techniques to improve communication within the organization, reduce order rework, and increase customer satisfaction.

Computer Skills (20%): Training will be provided to all occupations. All workers will receive training on new software, database systems, computer programs and MS Office. Training will help upgrade employee skillsets and facilitate the transfer of computerized data.

Continuous Improvement (10%): Training will be provided to all occupations. Training will focus on internal business systems and functionality. The goal is to create a more efficient business environment, improve quality and delivery times, and reduce waste.

Hazardous Materials (5%): Training will be provided to Supervisors and Mechanics. Workers will receive Hazardous Waste and Communication and Emergency Response Team Training. Training will lead to heightened awareness and responses to on-the-job incidents and will result in improved preparation in the event of a hazardous situation.

Manufacturing Skills (55%): Training will be provided to be Machine Operators, Machine Assistants, Supervisors, Mechanics, Production Control and Designers. These trainees will learn production and operating techniques to improve product quality, reduce delivery times, and increase operating efficiency. Trainees will also be cross-trained on equipment, equipment
set-up and change overs, shop math and preventive maintenance. This will improve lead times and efficiencies and prevent machine failures.

**Temporary to Permanent**

Based on production demand, CBC may hire temporary employees to fill production and administrative positions. These trainees qualify under Panel guidelines for “temporary to permanent” employment. CBC will retain these employees through a temporary agency, with the intention of hiring them into full-time, permanent positions after training.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. However, the retention and post-retention wage requirements cannot be satisfied until after CBC has hired them. Until then, the Company will not receive progress payments.

**Commitment to Training**

CBC represents that 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. Currently the Company provides new hire orientation, sexual harassment prevention, basic computer and some manufacturing skills.

- Training Infrastructure

The Company has a detailed training plan focused on new equipment and Lean Manufacturing processes. Upper management supports the planned training and is involved in the implementation process.

**High Unemployment Area**

Twenty-Five of the trainees in Job Number 2 work in the Santa Fe Springs facilities in Los Angeles County, a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%.

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. CBC is asking for a wage modification for trainees in Job Number 2, from $15.97 to $11.98.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0223</td>
<td>Santa Fe Springs and Rancho Cucamonga</td>
<td>11/16/2013–11/15/2015</td>
<td>$38,304</td>
<td>$35,116 (92%)</td>
</tr>
</tbody>
</table>
DEVELOPMENT SERVICES
N/A

ADMINISTRATIVE SERVICES
N/A

TRAINING VENDORS
To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS
- Communications
- Customer Service
- Sales Skills
- Interpersonal Skills
- Administrative Support Training
- Finance & Accounting
- Human Resources

CONTINUOUS IMPROVEMENT
- Team Building
- Leadership for Frontline Workers
- Lean Manufacturing
- Root Cause Analysis
- Project and Time Management
- Process Improvement

MANUFACTURING SKILLS
- Production Equipment Knowledge/Operation
- Machine Operator Cross-Training
- Equipment Troubleshooting
- Preventative Maintenance
- Machine Set-Up and Change Over
- Ink Training
- Shop Math
- Blue Print Reading

COMPUTER SKILLS
- Microsoft Office Applications
- Word, Excel, Outlook, Power Point and Access
- Design Software Applications

HAZARDOUS MATERIALS
- Hazardous Waste and Communications
- Emergency Response
- Chemical Exposures

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

Giligia College

Agreement Number: ET16-0169

Panel Meeting of: September 25, 2015

ETP Regional Office: North Hollywood Analyst: M. Reeves

**PROJECT PROFILE**

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retraineet SET HUA SB &lt;100 Priority Rate</td>
<td>Services Manufacturing</td>
</tr>
</tbody>
</table>

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

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

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

**FUNDING DETAIL:**

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$47,640</td>
<td>$3,287 8%</td>
<td>$50,927</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 50% of Total ETP Funding Required $33,600
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100</td>
<td>Business Skills, Computer Skills, Continuous Imp.</td>
<td>16</td>
<td>8-200</td>
<td>0</td>
<td>$1,411</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td>$15.97</td>
</tr>
<tr>
<td>2</td>
<td>Retraine SB &lt;100</td>
<td>Business Skills, Computer Skills, Continuous Imp.</td>
<td>13</td>
<td>8-200</td>
<td>0</td>
<td>$1,411</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td>$15.97</td>
</tr>
<tr>
<td>3</td>
<td>Retraine SB &lt;100 Priority Rate</td>
<td>Business Skills, Computer Skills, Continuous Imp.</td>
<td>6</td>
<td>8-200</td>
<td>0</td>
<td>$1,668</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 60</td>
<td>$15.97</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $15.97 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

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

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Numbers 1-3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td></td>
<td>21</td>
</tr>
<tr>
<td>Graphic Design Staff</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>Accounting Staff</td>
<td></td>
<td>2</td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Giligia College (Giligia) ([www.giligiacollege.com](http://www.giligiacollege.com)) is a for-profit training agency founded in 2006. Located in Van Nuys, Giligia offers professional studies and career-related programs. Giligia’s programs include office administration, multimedia design, medicine, information technology and environmental communication. However, this proposal will only utilize the office administration and multimedia design programs.

Giligia is eligible for ETP funding as a for-profit training agency. Giligia’s target market is small-to medium-sized companies and the core group of participating employers for this proposal represents at least 80% of the requested funding.

**PROJECT DETAILS**

While creating the training plan, Giligia staff met with management-level personnel representing each of the core group of participating employers in order to identify specific training needs and industry-related demands. Several employers indicated the need to improve workers’ skills in
computers applications to create spreadsheets, manage databases, prepare presentations, and generate reports. Additionally, office skills were determined to be equally important as workers needed to improve interactions with internal and external customers. As a result, the College crafted a comprehensive training program that can be customized to meet the specific needs of each employer.

Training Plan

**Business Skills (20%)** – Training will be offered to Administrative and Accounting Staff. Training in customer service, communication, and performance management skills will teach trainees to interact more effectively with internal and external customers, while enhancing overall business performance.

**Computer Skills (60%)** – Training will be offered to all occupations. Trainees will be offered various office productivity solutions and graphic design software courses. Training modules will include Microsoft Office applications, accounting/financial software, and multimedia content.

**Continuous Improvement (20%)** – Training will be offered to all occupations. Training is designed to enhance teamwork, problem solving, and decision making skills. These modules will provide workers with the skills needed to implement new processes, improve productivity, and become stronger leaders through teambuilding.

Marketing and Support Costs

Giligia’s marketing and recruitment efforts include direct contact with local employers and community organizations. In addition, the College participates in community workshops and presentations hosted by the San Fernando Chamber of Commerce.

Giligia also allocates resources to perform needs assessments, recruitment, and curriculum customization based on employer feedback. Giligia is requesting support costs to fund extensive marketing efforts and the recruitment of additional participating employers. Staff recommends the 8% Support Costs.

**SET/HUA**

Under Special Employment Training (SET), the participating employers in Job Number 1 are not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.

The trainees in Job Number 1 also work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. Consequently, these trainees, who work in Los Angeles County, qualify for the ETP Standard Minimum Wage ($15.97), rather than the Statewide Average Hourly wage. Job Number 1 trainees also qualify for a maximum 25% decrease from the ETP Standard Minimum Wage due to its HUA status; however, Giligia is not requesting a wage modification below the ETP Minimum wage.

Training Agency Certification

To qualify for ETP-funded training, a training agency must have been in existence for a minimum of two years preceding its application for funding and have an established history of providing training to the public. Giligia College meets the requirements since it has been servicing the public since 2006 and is certified as a training agency by BPPE.
**Tuition Reimbursement**

Giligia represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

**Commitment to Training**

Giligia represents that ETP funds will not displace the existing financial commitment to training by participating employers. It will be providing training for several small businesses with very limited training resources. ETP funding will allow structured training to occur that would not be possible otherwise due to budget constraints. Current training topics provided by employers include new employee orientation and mandated compliance matters. ETP funding will allow them to offer formal, on-site training to their employees. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

  Giligia's Director will oversee the implementation of this project. The College will also assign additional internal staff to coordinate marketing, recruitment, class scheduling, and rosters to ensure that project administration adheres to ETP requirements.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8–200

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Communication Skills
- Customer Service
- Performance Management Skills

**COMPUTER SKILLS**
- Microsoft Access
- Microsoft Excel
- Microsoft Outlook
- Microsoft PowerPoint
- Microsoft Word
- Multimedia Software/Applications
- QuickBooks
- MediaSoft
- Medical Billing Systems

**CONTINUOUS IMPROVEMENT**
- Leadership Skills
- Problem Solving
- Team Building

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
### Participating Employers in Retraining
#### Multiple Employer Contracts

**Contractor’s Name:** Gilgia College

**CCG No.:** ET16-0169

**Reference No:** 14-0659

- **PRINT OR TYPE IN ALPHABETICAL ORDER**

<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s):</th>
<th>Estimated # of employees to be retrained under this Agreement:</th>
<th>Total # of full-time company employees worldwide:</th>
<th>Total # of full-time company employees in California:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allstar Billing Solutions</td>
<td>121 W. Lexington Drive</td>
<td>Glendale, CA 91230</td>
<td>N/A</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>MB Medical Billing</td>
<td>3712 San Fernando Road</td>
<td>Glendale, CA 91204</td>
<td>N/A</td>
<td>5</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Pilossyan Medical Clinic</td>
<td>13321 Victory Blvd.</td>
<td>Van Nuys, CA 91401</td>
<td>N/A</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Sign Zone, Inc.</td>
<td>4873 Melrose Avenue</td>
<td>Los Angeles, CA 90029</td>
<td>N/A</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>
### Participating Employers in Retraine Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor’s Name: Gilgia College</th>
<th>CCG No.: ET16-0169</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No: 14-0659</td>
<td>Page 2 of 2</td>
</tr>
</tbody>
</table>

**PRINT OR TYPE IN ALPHABETICAL ORDER**

<table>
<thead>
<tr>
<th>Company: Sunland Smoke Shop, Inc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address: 8217 Foothill Blvd.</td>
</tr>
<tr>
<td>City, State, Zip: Sunland, CA 91040</td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s): N/A</td>
</tr>
<tr>
<td>Estimated # of employees to be retrained under this Agreement: 2</td>
</tr>
<tr>
<td>Total # of full-time company employees worldwide: 4</td>
</tr>
<tr>
<td>Total # of full-time company employees in California: 4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company: Unique World</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address: 140537 Glenoaks Blvd.</td>
</tr>
<tr>
<td>City, State, Zip: Pacoima, CA 91331</td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s): N/A</td>
</tr>
<tr>
<td>Estimated # of employees to be retrained under this Agreement: 6</td>
</tr>
<tr>
<td>Total # of full-time company employees worldwide: 36</td>
</tr>
<tr>
<td>Total # of full-time company employees in California: 36</td>
</tr>
</tbody>
</table>
RETRAINEE - JOB CREATION
Training Proposal for:
Homeboy Industries
Agreement Number: ET16-0194

Panel Meeting of: September 25, 2015
ETP Regional Office: North Hollywood  Analyst: E. Wadzinski

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retrainee Priority Rate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HUA Job Creation Initiative</td>
<td>Priority Industry:</td>
<td>Yes</td>
</tr>
<tr>
<td>Ex-Offender</td>
<td>□ No</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles</td>
<td>□ Yes</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>Turnover Rate: 16%</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA: 295</td>
<td></td>
</tr>
<tr>
<td>U.S.: 295</td>
<td></td>
</tr>
<tr>
<td>Worldwide: 295</td>
<td></td>
</tr>
</tbody>
</table>

| Managers/Supervisors:      |                     |
| (% of total trainees)      | 6%                  |

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$244,640</td>
<td>$0</td>
<td>$0</td>
<td>$244,640</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
<th>100% of Total ETP Funding Required</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$486,000</td>
</tr>
</tbody>
</table>
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineen Priority Rate HUA</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Mfg Skills, Literacy Skills, OSHA 10/30</td>
<td>80</td>
<td>8 - 200</td>
<td>0</td>
<td>$2,448</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 136</td>
<td>$11.98</td>
</tr>
<tr>
<td>2</td>
<td>Job Creation Initiative Retraineen Priority Rate HUA</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Impr, Mfg Skills, Literacy Skills, OSHA 10/30</td>
<td>20</td>
<td>8 - 200</td>
<td>0</td>
<td>$2,440</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 122</td>
<td>$10.00*</td>
</tr>
</tbody>
</table>

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

Minimum Wage by County:  Job Number 1: $11.98 per hour for Los Angeles County (HUA).  
Job Number 2: $9.98 per hour for Los Angeles County (HUA/Job Creation)

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

Used to meet the Post-Retention Wage?: ☑ Yes ☐ No ☐ Maybe  
Up to $1.98 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Job #1 Estimated # of Trainees</th>
<th>Job #2 Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bakery Staff (manufacturing, production, distribution)</td>
<td>23</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Café Staff (food prep, line, busser, dishwasher, server/host, barista)</td>
<td>21</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Customer Service/Sales</td>
<td>6</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>5</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Front of the House Workers</td>
<td>17</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>6</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Maintenance/Facilities</td>
<td>2</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Homeboy Industries (www.homeboyindustries.org) was founded by Father Gregory Boyle in 1992, to provide an alternative to the cycle of gang violence that plagues many parts of Los Angeles County. Homeboy Industries is registered to do business in the State of California as a non-profit corporation.

According to Homeboy Industries, their “social enterprise model” of recruitment, hiring and training is recognized as the largest and most successful gang intervention and re-entry program in the world. The Company has initiated various business lines for this purpose. These business lines include Homeboy Bakery, Homeboy Grocery, Homegirl Café, Homeboy Diner at City Hall, Homeboy Industries Food Truck, and Homeboy Silkscreen/Embroidery. Given the predominance of commercial baking and food production, this Company meets Panel standards for out-of-state competition as an industrially-classified manufacturer.

PROJECT DETAILS

Homeboy Industries employs 250-300 previously incarcerated individuals per year, in a full-time capacity within its food and apparel business lines. They are typically employed for up to 18 months in a “job preparation” program prior to transitioning either to internal or external employment.

Training in Job Number 1 will be provided to a subset of the Company’s target population who have successfully completed the 18-month program. They have been hired into permanent, full-time positions “internally” within the Company. Turnover among these employees is generally less than 10%. Training will focus on workers in the Bakery, Café, Catering, Silkscreen or Headquarters (Front of the House). Placement will be determined by trainee assessments and evaluations. Training will occur on-site in Los Angeles and Culver City.

Training in Job Number 2 will be for entry-level employees who are still going through the job preparation program. Turnover among these employees is higher, averaging 16%. After the 18 months of preparation, the Company will help them find jobs either internally or externally. For this proposal, only the trainees who are hired internally will be included.

Retrainee - Job Creation

In support of Job Creation, the Panel is offering incentives to companies that commit to hiring new employees. Under the Retrainee-Job Creation program, training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

In this proposal, Homeboy Industries has committed to hiring 20 new employees (Job Number 2). Homeboy Industries represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract.

Homeboy Industries’ food manufacturing and silkscreen businesses have grown substantially over the years, and with better trained workers these enterprises have the potential to produce a higher volume of goods and generate increased revenue, allowing the company to serve more clients in its social programs (case management, mental health, education, tattoo removal, and employment services). Additionally, Homeboy Industries recently purchased a new building adjacent to its headquarters in Los Angeles.
Training Plan

ETP training will help employees, all of whom have major barriers to employment—such as a criminal history and a lack of education—gain the skills necessary to be competitive in the mainstream job market.

Business Skills (10%) - Training will be provided to Supervisors, Administration, Bakery Staff, Café Staff, Maintenance/Facilities, Front-of-the-House Workers, Bakery Trainees, and Café Trainees. This training will help improve efficiency and effectiveness in specific roles, communication, interpersonal skills, and product knowledge. It will also help maintain positive relationships among staff and guests.

Commercial Skills (10%) - Training will be provided to all occupations to provide further knowledge on Homeboy Industries' "Products with a Purpose".

Computer Skills (10%) - Training will be provided to all occupations with a focus on efficiency in procedures, purchasing, sales and customer service functions.

Continuous Improvement (15%) - Training will be provided to all occupations to identify processes to improve quality, production performance, and distribution.

Manufacturing Skills (20%) - Training will be provided to Supervisors, Café and Bakery Levels 1 and 2, and Maintenance/Facilities to focus on quality assurance, equipment operations, maintenance and sanitation.

Literacy Skills (30%) - Training will be offered to all occupations who must overcome language barriers in the workforce to improve employee teamwork and productivity.

Certified Safety Training

OSHA 10/30. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers (Café and Bakery Levels 1 and 2, and Maintenance/Facilities) and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Commitment to Training

Homeboy Industries provides new hire orientation, work readiness, basic life skills and on the job training. Homeboy Industries represents that 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

Homeboy Industries is ready to start training upon approval. Seven incumbent employees who have experience working with the Homeboy Industries “social enterprise model” have been dedicated to administration and training. This includes the Re-Entry Service Director, Educational Service Director, Human Resources Manager, Bakery Director, Food & Beverage Operations Director and Silkscreen Director. These employees will be overseeing processes such as enrolling trainees, scheduling training, and entering information into the ETP On-Line systems.
High Unemployment Area

Trainees in Job Numbers 1 and 2 work in the City of Los Angeles, a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%.

The Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Homeboy Industries is asking for a wage modification for trainees in Job Number 1 (from $15.97 to $11.98) and Job Number 2 (from $13.31 to $10.00). Wages for trainees in Job Number 1 must reflect an increase from wages earned before training.

Other Resources

Although Homeboy Industries receives funding and other incentives from the U.S. Department of Labor’s “Training to Work” program and Fund-LA:RISE (led by the City of Los Angeles WIB, with support from REDF and several local WIBs) to support their mission to provide a career path for incarcerated and gang-affiliated individuals, the Company representative states that none of their other resources will be used for the ETP training outlined in this Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined
**Exhibit B: Menu Curriculum**

**Class/Lab Hours**
8 – 200

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Project Management
- Budget and Cost Controls
- Change Management
- Communication Skills
- Effective Listening Skills
- Customer Service
- Conflict Resolution
- Inventory Control
- Finance Principles
- Sales Skills
- Work Flow and Occupations
- Goal Setting, Scheduling and Planning
- Purchasing and Inventory
- Time Management

**COMMERCIAL SKILLS**
- Catering Event Production
- Food Handling and Safety
- Kitchen Waste Handling and Disposal
- Work Procedures

**COMPUTER SKILLS**
- Word Processing
- Data Processing
- Spreadsheets/Forms
- Databases
- Search Engines
- Content Control, Editing
- Sales Software POSi Touch, MICROS Square Register, POMEsys
- E-commerce
- Accounting Software/Quickbooks
- ADP

**CONTINUOUS IMPROVEMENT**
- Lean Manufacturing/Operations
- Process, Plan and Cost Control
- Coaching and Counseling
- Problem Solving
- Decision-Making
- Managing Resources
- Managing Diversity
- Understanding Work Dynamics
- Quality Control
- Standard Work and Operations
- Teambuilding/Motivating Employees
- Frontline Leadership
- SMART Goals
MANUFACTURING SKILLS
- Equipment Operation, Maintenance and Troubleshooting
- Blueprint Reading
- Shop Math
- Material Handling/Lifting Devices
- Machinery and Machine Guarding
- Toxic and Hazardous Materials
- Proper Usage of Hand Tools
- Workplace Assessment for Safety
- Basic Logistics Practices
- Sanitation
- Forklift

OSHA 10/30 (OSHA Certified Trainer)
- OSHA 10 (Requires Completion of 10 Hours)
- OSHA 30 (Requires Completion of 30 Hours)

LITERACY SKILLS
- Vocational Reading, Writing, and Speaking English
- Vocational Vocabulary and Terminology

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
Amendment Proposal #2 for:
Los Angeles Pacific College
Agreement Number: ET15-0290

Amendment Effective:  September 25, 2015

Panel Meeting of:  September 25, 2015

ETP Regional Office:  North Hollywood

Analyst:  M. Paccerelli

CURRENT PROJECT PROFILE

Contract Type:  SET/MB - New Hire
SET/Entrepreneurial
SB<100

Industry Sector(s):  Services
Retail
Healthcare
Manufacturing

Counties Served:  Los Angeles, Orange, Ventura, Riverside, San Bernardino

Repeat Contractor:  ☑ Yes  ☐ No

Priority Industry:  ☑ Yes  ☐ No

Union(s):  ☐ Yes  ☑ No

Current Contract Term:  May 16, 2015 to May 15, 2017

Substantial Contribution:  ☐ Yes  ☑ No

CURRENT FUNDING


<table>
<thead>
<tr>
<th>Current Funding</th>
<th>In-Kind Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>$95,471</td>
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AMENDMENT FUNDING


<table>
<thead>
<tr>
<th>Requested Funding</th>
<th>Support Costs</th>
<th>Amendment Funding</th>
<th>In-Kind Contribution</th>
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</thead>
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<tr>
<td>+$47,200</td>
<td>+$3,020</td>
<td>+$50,220</td>
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Total Funding

<table>
<thead>
<tr>
<th>Total Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$145,691</td>
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AMENDMENT TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SET SB&lt;100 Entrepreneurial</td>
<td>Business Skills; Computer Skills; Literacy Skills</td>
<td>37</td>
<td>24-260</td>
<td>0</td>
<td>$5,022</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 236</td>
<td>$12.33</td>
</tr>
<tr>
<td>2</td>
<td>SET New Hire Multiple Barriers</td>
<td>Business Skills; Computer Skills; Literacy Skills</td>
<td>10</td>
<td>24-260</td>
<td>0</td>
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<td>Weighted Avg: 236</td>
<td>$12.33</td>
</tr>
<tr>
<td>3</td>
<td>SET New Hire Multiple Barriers</td>
<td>Business Skills; Computer Skills; Literacy Skills</td>
<td>10</td>
<td>24-260</td>
<td>0</td>
<td>$5,022</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 236</td>
<td>$12.33</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $13.31 per hour for Los Angeles County; $13.35 per hour for Orange County; $12.33 for Ventura, Riverside and San Bernardino counties.

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

**Used to meet the Post-Retention Wage?**: ☒ Yes ☐ No ☐ Maybe Participating employers may use health benefits to meet the Post-Retention Wage.

---

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
</tr>
<tr>
<td>Small Business Owner</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 2</strong></td>
<td></td>
</tr>
<tr>
<td>Accounting Technician</td>
<td></td>
</tr>
<tr>
<td>Accounts Receivable Clerk</td>
<td></td>
</tr>
<tr>
<td>Accounts Payable Clerk</td>
<td></td>
</tr>
<tr>
<td>Bookkeeper</td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 3</strong></td>
<td></td>
</tr>
<tr>
<td>Accounting Technician</td>
<td></td>
</tr>
<tr>
<td>Accounts Receivable Clerk</td>
<td></td>
</tr>
<tr>
<td>Accounts Payable Clerk</td>
<td></td>
</tr>
<tr>
<td>Bookkeeper</td>
<td></td>
</tr>
</tbody>
</table>

---

**INTRODUCTION**

Founded in 1989, Los Angeles Pacific College (LAPC) is a private vocational training facility providing occupational skills to individuals seeking new or enhanced employment. LAPC is approved by the Bureau for Private Postsecondary Education (BPPE) and Department of Veterans Affairs; and has authorization from the United Stated Immigration and Customs Enforcement to enroll foreign students. LAPC has been providing training and placement of unemployed individuals for more than two decades and has established a network of companies that contact the school on a regular basis in search of trainees prepared to enter the workforce.
AMENDMENT DETAILS

Phase II Training

LAPC is requesting Phase II funds to train an additional 10 New Hire trainees (Job Number 3). The original intent of this New Hire project was to provide unemployed individuals with multiple barriers to employment, with the entry-level skills needed to attain fulltime employment in specialized accounting and bookkeeping occupations. This Amendment will not change the original intent of the Agreement.

LAPC is continuously recruiting from Employment Development Department, America’s Job Centers; and other community-based agencies. LAPC reports that employer demand continues to be strong for these targeted occupations.

In summary, this Amendment will:

- Increase the Agreement amount by $50,220 (from $95,471 to $145,691);
- Increase the estimated number of trainees by 10 (from 47 to 57);

SUMMARIZE PRIOR MODIFICATION

Revision 1: Revised the contract term and increased the ETP minimum wage in Job Number 2

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Average)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
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<tr>
<td>ET15-0290</td>
<td>$95,471</td>
<td>05/16/2015–05/15/2017</td>
<td>47</td>
<td>8</td>
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</table>

Training commenced on 05/16/2015 and is ongoing for 32 trainees. Based on the ETP Systems, 6,162 hours have been tracked for potential earnings of $79,151 (83% of approved amount). The Contractor projects final earnings of 100% based on training in progress and currently committed through October 2015.
Exhibit B: Menu Curriculum

Class/Lab Hours
8-75 (Job Number 1)
24-260 (Job Number 2)
8-260 (Job Number 3)

Trainees may receive any of the following:

**ENTERPRENEURIAL TRAINING**

**BUSINESS SKILLS**

- **Business Management:**
  - Pension & Employee Benefits: Keogh Plan, 401(K) Plan, Self-Employed Retirement Plan & Simplified Employee Pension (SEP) Plan
  - Insurance: Accident & Health Benefits, Group Term Insurance & Medical Premiums of Self-Employed

- **Bookkeeping:**

- **Business Tax Information and Preparation:**
  - Sales Tax, City Business Tax & Payroll Taxes, Employer & Employee Rights & Benefits

**COMPUTER SKILLS**

- **QuickBooks Pro:**
  - Introduction to Computers & QuickBooks Pro, Sales & Receivables, Payables & Purchases, General Accounting & End-of-Period Procedures, Payroll, Computerizing a Manual Accounting System
NEW HIRE TRAINING

BUSINESS SKILLS

- Bookkeeping:

- Business Tax Information and Preparation:
  - Sales Tax, City Business Tax & Payroll Taxes, Employer & Employee Rights & Benefits

COMPUTER SKILLS

- Microsoft Excel:
  - Excel Basics, Changing the Appearance of the Worksheet, Organizing the Worksheet, Worksheet Formulas, Function Formulas, Making the Worksheet Useful, Working with other Software Tools, Worksheet Charts

- QuickBooks:
  - Introduction to Computers and QuickBooks Pro, Sales & Receivables, Payables & Purchases, General Accounting & End-of-Period Procedures, Payroll, Computerizing a Manual Accounting System

LITERACY SKILLS*

- Basic English language skills such as writing letters and business reports, reading work orders, safety regulations and other documents, language comprehension, understanding verbal directions and instructions

*Literacy Skills training hours may equal vocational skills training hours on a per trainee basis.

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

Note: Reimbursement for retraining (Entrepreneurial) is capped at 75 total training hours per trainee, regardless of the method of delivery. Reimbursement for new hire training is capped at 260 total training hours per trainee.
RETRAINEE - JOB CREATION
Training Proposal for:
M.S. Aerospace Inc.
Agreement Number: ET16-0180

Panel Meeting of: September 25, 2015
ETP Regional Office: North Hollywood        Analyst: J. Romero

PROJECT PROFILE

<table>
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<tr>
<th>Contract Attributes:</th>
<th>Retraineе</th>
<th>Priority Rate</th>
<th>Job Creation Initiative</th>
<th>Industry Sector(s):</th>
<th>Aerospace and Defense Manufacturing</th>
<th>Priority Industry:</th>
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<th>No</th>
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</thead>
<tbody>
<tr>
<td>Counties Served:</td>
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<td></td>
<td>Repeat Contractor:</td>
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<td>No</td>
<td></td>
<td>-----</td>
<td>----</td>
</tr>
<tr>
<td>Union(s):</td>
<td>□ Yes</td>
<td>☒ No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>-----</td>
<td>----</td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 290</td>
<td>U.S.: 290</td>
<td>Worldwide: 290</td>
<td>Turner Rate:</td>
<td>4%</td>
<td>Managers/Supervisors:</td>
<td>5%</td>
<td>(% of total trainees)</td>
</tr>
<tr>
<td></td>
<td>$188,300</td>
<td>$0</td>
<td>$0</td>
<td>Total ETP Funding</td>
<td>$188,300</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $256,550
### Training Plan Table

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority rate</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Hazardous Materials, Management Skills, OSHA 10, Osha 30, Advanced Technology, Manufacturing Skills, PL-Manufacturing</td>
<td>175</td>
<td>8 - 200</td>
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<td>Weighted Avg: 52</td>
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</table>

**Minimum Wage by County:** Job Number 1: $15.97 per hour Standard Wage for Los Angeles County; Job Number 2 (Job Creation): $13.31 per hour for Los Angeles County

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

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

Up to $2.00 per hour may be used to meet the Post-Retention Wage.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Managers &amp; Supervisors</td>
<td></td>
<td>6</td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1992, M.S. Aerospace, Inc. (MSA), (www.msaerospace.com) manufactures high temperature and high strength aerospace fasteners, bolts, studs, pins, and screws for the aerospace, military and medical industries. Some of their clients include: US Government, General Electric and Pratt & Whitney. MSA produces superior quality specialty fasteners in styles such as 12-Point, D-Head, 6-Lobe, Slab-Head, Hex Head, Shear Head, Flush Head, and Spline Head configurations. MSA is also capable of designing parts for any application which can be custom fabricated to customer specifications. MSA continues to add many high-strength, high-fatigue structural and landing system parts, medical parts, and other high-performance parts to its company portfolio. MSA has rigorous expectations of product excellence and adheres to strict regulations in the performance, documentation, reliability and safety of their products. Presently, the Company is certified to both ISO 9001:2009 and AS 9100:2009. MSA is also Qualified Suppliers List of Distributors approved by the Department Of Defense and has National Aerospace and Defense Contractors Accreditation Program (NADCAP) accreditation in their Laboratory, Heat Treatment and Non-Destructive Testing areas.

MSA’s continued growth and the consistent increase in demand for their products has prompted the need to train and upgrade the skills of their employees. The need to acquire new equipment to sustain the quality and reliability of the Company and manufacturing has also increased the demand for training. In order for the Company to grow and meet the demands of their customers, MSA needs to ensure that their workforce is highly qualified to operate both existing and newly acquired equipment. In addition, MSA wants to be prepared to meet the demands of the new market for new jet engines which would increase their sales by 20% - 40% in the next two years.

Training will take place at the Company’s facilities in Sylmar. MSA is in a Priority Industry and engaged in an industry that faces out-of-state competition. This will be MSA’s first ETP agreement.

PROJECT DETAILS

Training, including cross-training new hires and incumbent workers in different processes and equipment use, will improve employees’ skills and enable MSA to meet production schedules, improve product quality and have a leaner order-to-delivery process. The proposed training will also certify employees from a wide variety of sources in areas of: ISO, NADCAP, and NIST (National Institute of Standards and Technology) and will increase employee engagement and retention.

MSA recently purchased several new pieces of equipment which include a 3D printer, Fanuc robots 3, a Weldon CNC OD Grinder and a RSS CNC Centerless grinder which require staff
training to maximize use. MSA also plans to purchase an automated computerized vertical storage unit, two new forging presses and additional robots within the next six months. This equipment will require various levels of training once installed.

**Retraine - Job Creation**

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

MSA has committed to hiring 25 new employees (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

**Training Plan**

MSA conducted a company-wide needs assessment which identified specific needs in each department requiring an upgrade in work processes. The proposed training is designed to provide task-oriented skills and cross training on MSA’s highly technical equipment. Training will be provided to the following occupations: Administration/Sales Staff, Maintenance Staff, Production Staff, Quality Assurance Staff, Manager and supervisors.

**Business Skills (5%):** This training will be offered to all staff and includes Customer Service, Conflict Management, Effective Communication, Writing Skills and Strategic Planning.

**Computer Skills (5%):** This training will be offered to Maintenance, Production and Quality Assurance Staff. Trainees will be trained on the software requirements of the Company’s production equipment and its Manufacturing Resource Planning software.

**Continuous Improvement (5%):** This training will be offered to all staff to learn the skills of Leadership, Team Building and Decision Making. Maintenance, Production and Quality Assurance Staff will be trained in Statistical Process Control.

**Management Skills (10%):** Coaching, Leadership, Motivation and Decision Making will be offered to Managers and Supervisors.

**Manufacturing Skills (50%):** This training will be offered to Production and Quality Assurance Staff to cross train in various production equipment and acquire knowledge and skills in Production Operations, CNC Operations, Machine Operations, Blue Print Reading, Precision Measurement, Powered Equipment operations, Lock Out Tag Out, and Confined Space training. This training will advance the company in its goal of becoming a High Performance Workplace.

**Hazardous Materials (5%):** This training will be offered to Maintenance Staff to ensure the proper and safe handling of toxic materials involved in Manufacturing.

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

**Advanced Technology (5%):** This training will be offered to select production and Quality Assurance Staff consisting of Mechanical engineers; Electrical engineers’ Production Planners,
Prototype manufacturing and Tool and die design/fabrication staff. They will receive training in Solid/Parametric modeling, Digital prototyping, Additive manufacturing, and Programmable logic controllers for Robotic Operations and CAD/CAM.

**PL – Manufacturing Skills** (10%): This training will be offered to Production and Quality Assurance staff. This training is necessary to provide the link between the initial training and the implementation of the skills learned.

**Advanced Technology**

There are approximately 15 employees who will participate in Advanced Technology (AT) courses in the following occupations: Mechanical engineers, Electrical engineers, Production planner, Prototype manufacturing staff and Tool and die designers and fabricators. These individuals work on programming and designing applications based on the tolerance levels required by the specifications. They are responsible for writing programs and adapting software to adhere to our strict tolerances. The required equipment are AutoCAD; Inventor Solid Modeling Software, SPC software and Robotics. The specifications and tolerance limits require very advanced calculations and specialized manufacturing processes. Staff in these occupations determine how to meet those requirements using MSA equipment and processes and would therefore benefit from training.

The trainer-to-trainee ratio is 1:10 for AT, to allow in-depth coverage and personal attention from the instructor.

**Certified Safety Training**

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

**Productive Laboratory**

The Panel adopted regulations to authorize reimbursement for training delivered in a Productive Laboratory (PL) setting. Trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training. Productive Lab will be provided to 145 Production and Quality Assurance Staff. Each trainee will receive a minimum of 1 hour of PL training but will not exceed 20 hours. PL training will be provided in the MSA production area at a 1:1 Trainer-to-Trainee ratio. PL training will be on existing and newly purchased equipment.

**Commitment to Training**

ETP funds will not displace MSA’s existing financial commitment to training. MSA will continue to provide mandatory and job-specific training at its own expense during the term of the proposed Agreement, including orientation, anti-harassment and computer-based training software which is part of their annual training budget of $30,000. The Company also represents that that safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure
The Company is ready to start training upon approval of the Agreement. MSA has qualified trainers in place who will provide training on specific areas of their expertise. MSA also retained the services of Tax Credit Co., for the administration of this project, who will work with the Company’s Human Resources personnel to assist in the enrollment process, training data collection and entry into ETP’s online class/lab tracking system.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

MSA retained Tax Credit Co. in Los Angeles to assist with development of this proposal for a flat fee of $15,000.

**ADMINISTRATIVE SERVICES**

MSA also retained Tax Credit Co. to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

**TRAINING VENDORS**

To Be Determined
Class/Lab Hours
8-200

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Customer Service
- New Product Knowledge
- Strategic Planning
- Business writing
- Conflict Management
- Interpersonal Skills
- Effective Communication
- Business Performance

**COMPUTER SKILLS**
- MRP
- New Equipment software and operations

**CONTINUOUS IMPROVEMENT**
- Statistical Process Control
- Leadership Skills
- Team Building
- Decision Making

**MANAGEMENT SKILLS (Limited to Managers only)**
- Coaching
- Leadership
- Motivation
- Decision Making

**HAZARDOUS MATERIALS**
- Hazardous Material Handling

**OSHA**
- OSHA 10 (Requires Completion of 10 Hours)
- OSHA 30 (Requires Completion of 30 Hours)

**MANUFACTURING SKILLS**
- Production Operations
- CNC Operations
- Cross Training
- Machine Operations
- Blue Print Reading
- Precision Measurement
- Lock Out Tag Out
- Powered Equipment Operation
- Confined Spaces
**Productive Lab**

**PL - MANUFACTURING SKILLS (Ratio is 1:1)**
- Production Machines (16 hours)
- Heat Treat Furnace (12 hours)
- Wire EDM Machine (12 hours)
- Measurement Tools (12 hours)
- Count Verification Stations (6 hours)
- Visual Inspection Station (8 hours)

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

**AT Hours**

**ADVANCED TECHNOLOGY (Ratio 1:10)**
- Solid/Parametric Modeling
- Digital Prototyping
- Additive Manufacturing
- Programmable Logic Controllers for Robotic Operations
- CAD/CAM

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

Murrieta Chamber of Commerce

Agreement Number: ET16-0161

Panel Meeting of: September 25, 2015

ETP Regional Office: San Diego

Analyst: K. Campion

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
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</thead>
<tbody>
<tr>
<td>Retrainees</td>
<td>Manufacturing</td>
</tr>
<tr>
<td>Priority Rate</td>
<td>Goods Movement</td>
</tr>
<tr>
<td>SB &lt;100</td>
<td>Transportation/Logistics</td>
</tr>
<tr>
<td>HUA</td>
<td>Aerospace and Defense</td>
</tr>
<tr>
<td></td>
<td>Wholesale Trade</td>
</tr>
</tbody>
</table>

Repeat Contractor: Yes

Counties Served: Riverside, San Bernardino, San Diego, Orange, Los Angeles

Union(s): Yes

Sheet Metal, Air, Rail, Transportation Workers Local Union 105

Turnover Rate: ≤20%

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

### FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
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<tbody>
<tr>
<td>$176,820</td>
<td>$12,165 8%</td>
<td>$188,985</td>
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**In-Kind Contribution:** 50% of Total ETP Funding Required $202,000
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineep</td>
<td>Business Skills, Computer Skills, Cont. Impr., Mfg. Skills, OSHA 10/30</td>
<td>105</td>
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<tr>
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<td></td>
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<tr>
<td>3</td>
<td>Retraineep</td>
<td>Business Skills, Computer Skills, Cont. Impr., Mfg. Skills, OSHA 10/30</td>
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<td>$15.07</td>
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<tr>
<td></td>
<td>Priority Rate SB&lt;100</td>
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<td>Weighted Avg: 34</td>
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</tr>
<tr>
<td>4</td>
<td>Retraineep</td>
<td>Business Skills, Computer Skills, Cont. Impr., Mfg. Skills, OSHA 10/30</td>
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<td>8 – 200 0</td>
<td>$564</td>
<td>$15.07</td>
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<td>SB &lt;100</td>
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<td>Weighted Avg: 24</td>
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</table>

**Minimum Wage by County:** $15.07 per hour for Riverside and San Bernardino Counties; $15.93 per hour for San Diego County; $15.97 per hour for Los Angeles County; and $16.02 per hour for Orange County.

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

**Used to meet the Post-Retention Wage?:** ☐ Yes ☐ No ☒ Maybe Participating employers may use health benefits to meet the Post-Retention Wage.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
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<tbody>
<tr>
<td>Job Numbers 1 - 4</td>
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<tr>
<td>Administration Staff</td>
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<tr>
<td>Operator I</td>
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<tr>
<td>Operator 2</td>
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<td>15</td>
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<tr>
<td>Production Worker 1</td>
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<tr>
<td>Production Worker 2</td>
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<td>Lead</td>
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<tr>
<td>Technician</td>
<td></td>
<td>40</td>
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<tr>
<td>Engineer</td>
<td></td>
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</table>
INTRODUCTION

Founded in 1915 and located in Southwest Riverside County, the Murrieta Chamber of Commerce (Murrieta Chamber) is a nonprofit membership organization comprised of 850 members within the region. Its mission is to create and foster a sustainable business environment in the Murrieta area through networking, promotion and advocacy, and to assist small businesses to grow and achieve their goals through education and mentorship. The Murrieta Chamber works in partnership with the City of Murrieta on economic development and with other Chambers in Southwest Riverside County that form the Southwest California Legislative Council.

The Murrieta Chamber also partners with the Southwest Cluster of the Riverside County Manufacturers and Exporters Association. This association helps identify the needs of manufacturers and links employers to the tools to help them to be more successful. Many of its member companies need training to upgrade the skills of their workforce, specifically, to help them grow and stay competitive in Southern California.

As such, this proposal will reach small and large priority, and non-priority businesses that have out-of-state competition. Most participating employers will be manufacturing companies located in Riverside County, but training may extend to companies in surrounding areas, including San Diego, San Bernardino, Orange and Los Angeles counties.

PROJECT DETAILS

Employer Demand

Through its partnerships, memberships and assessments, the Murrieta Chamber has found that employers need workers with the best tools and skills to stay competitive. Employers report a training need in social media for small business marketing; customized computer skills; and continuous improvement training. Manufacturing companies have also specifically identified training needs such as ISO Auditor Training, Lean Enterprises and Process Improvement training, all critical to helping companies reduce waste and improve operation efficiencies.

The “core” group of participating employers are manufacturing companies representing at least 80% of requested funding. Approximately 95% of the proposed training will be conducted at participating employers’ sites and the remaining 5% will be center-based at the Murrieta Chamber’s facility. Under this proposal, approximately 50% of the trainees are projected to come from small businesses.

Training Plan

All training will be customized to meet the employer needs based on assessments and industry demands. Training will be delivered via class/lab in the following:

Business Skills (30%) — Training will be provided to all occupations to improve written and verbal communication skills, develop leadership skills, provide quality customer service and provide new skills in social media marketing.
Computer Skills (10%) – Training will be provided to select Administration Staff, Owners and Supervisor/Managers to help design, program, implement, and troubleshoot new computer software programs and social media networking.

Continuous Improvement (40%) – Training will be provided to all occupations to help workers improve workflow, and troubleshoot and resolve problems. Lean Enterprise training will assist trainees in developing strategies for process improvements and improved business processes.

Manufacturing Skills (18%) – Training will be provided to Production Workers, Operators, and Leads. Trainees will learn how to read blue prints and schematics, apply Advanced Measurement Skills and learn Inventory Management.

OSHA 10/30 (2%) – Training will be provided to select Production Workers and Supervisor/Managers. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Impact/Outcome

Trainees in the ISO Auditor training may receive ISO Certification for Continuous Improvement. Other certifications include OSHA 10/30.

Union Support

One participating employer in the core group, Superior Duct Fabrication, has submitted a letter of support for training its workers represented by the Sheet Metal, Air, Rail, Transportation Workers Local Union 105.

High Unemployment Area (HUA)

Although some participating employers may be located in an HUA, Murrieta Chamber is not asking for a wage or retention modification.

Marketing and Support Costs

The Murrieta Chamber will continue to create an aggressive marketing plan through its website, including live presentations at monthly meetings, flyers and social media to its members and partners. The Chamber will market the ETP funds as an additional benefit for its members and work with its local partners and the Southwest Cluster Riverside County Manufacturers and Exporters Association to promote the ETP funded training.

The Murrieta Chamber requests the 8% support to cover the cost of marketing and recruiting additional participating employers, assessing their specific training needs, developing job-specific curricula and training schedules, and conducting necessary follow-up during retention. This will be an on-going activity throughout the duration of the Agreement. Staff recommends the 8% support costs.

Commitment to Training

Most employers provide basic on the job training or job specific training and will continue to do so. ETP funds are intended to provide supplemental training for companies who lack the
training budget or resources to provide training on their own, but whom need training to upgrade
the job skills of their workers to keep the workforce competitive. The Murrieta Chamber
represents that ETP funds will not displace the existing financial commitment to training of
participating employers.

➢ Training Infrastructure

The President/CEO and an Administrative Assistant will oversee and manage this training
project, including maintaining all class/lab attendance rosters. DLI & Associates, LLC will
provide ETP project administration, including enrolling and tracking trainees in the ETP on line
systems.

An experienced, California-based training vendor, Custom Corporate Communications (C3), will
provide all training, scheduling, curriculum and employer assessments. C3 is located in
Redondo Beach but has training instructors located in Riverside and across Southern California.

Tuition Reimbursement

In accordance with Title 22, CCR, Section 4412.1, Murrieta Chamber represents that students
enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs
associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

DLI & Associates, LLC in San Juan Capistrano assisted with development of this proposal at no
charge.

ADMINISTRATIVE SERVICES

DLI & Associates, LLC will also perform administrative services in connection with this proposal
for an amount not to exceed 10% of payment earned.

TRAINING VENDORS

Custom Corporate Communications of Redondo Beach, CA, has been retained to provide
training for approximately $151,390.
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

BUSINESS SKILLS
- Business Writing Skills
- Communication Skills
- Customer Service/Satisfaction Skills
- Sales Skills
- Social Media Marketing
- Project Management
- Leadership Skills:
  - Finance for Non Finance People
  - Goal Setting
  - Managing Change
  - Performance Management Skills
  - Problem Solving
  - Team Building
  - Time and Priority Management

COMPUTER SKILLS
- E-Commerce Software Skills
- Accounting Software Application Skills
- Search Engine Optimization
- Social Media Networking Training
- Microsoft Office Suite (Beginning Level for Small Business only):
  - Word
  - Excel
  - Access
  - PowerPoint

CONTINUOUS IMPROVEMENT
- ISO Auditor Training
- Quality Engineering
- Six Sigma
- Statistical Process Control Team Building
- Lean Enterprise:
  - Lean Manufacturing
  - Lean Office
  - Kaizen 7S
  - Process Improvement
  - Process Mapping
  - Problem Solving
  - Root Cause Analysis
  - Set-Up Time Reduction
MANUFACTURING SKILLS
- Advance Measurement Skills
- Inventory Management
- Electrical Fundamentals
- Blue Print Reading

OSHA10/30 (Certified OSHA Instructor)
- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
## Participating Employers in Retrainee
### Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor's Name:</th>
<th>Murrieta Chamber of Commerce</th>
<th>CCG No.:</th>
<th>ET16-0161</th>
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<tbody>
<tr>
<td>Reference No.:</td>
<td>15-0293</td>
<td>Page:</td>
<td>1 of 2</td>
</tr>
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**PRINT OR TYPE IN ALPHABETICAL ORDER**

<table>
<thead>
<tr>
<th>Company:</th>
<th>AKA Products</th>
<th>Address:</th>
<th>25703 Jefferson Ave., #27</th>
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<tbody>
<tr>
<td>City, State, Zip:</td>
<td>Murrieta, CA 92562</td>
<td></td>
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<tr>
<td>Collective Bargaining Agreement(s):</td>
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<tr>
<td>Estimated # of employees to be retrained under this Agreement:</td>
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<tr>
<td>Total # of full-time company employees in California:</td>
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<table>
<thead>
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<td>City, State, Zip:</td>
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<tr>
<td>Collective Bargaining Agreement(s):</td>
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<tr>
<td>Total # of full-time company employees in California:</td>
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<table>
<thead>
<tr>
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<th>NutraMed Inc.</th>
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<th>13840 Magnolia Ave.</th>
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<td>Total # of full-time company employees worldwide:</td>
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<table>
<thead>
<tr>
<th>Company:</th>
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<th>7737 Mission Gorge Road</th>
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<td>Collective Bargaining Agreement(s)</td>
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<tr>
<td>-------------------------------</td>
<td>--------------------------------------</td>
<td>-------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Superior Duct Fabrication Inc.</td>
<td>1983 MT Vernon Ave.</td>
<td>Pomona, CA 91740</td>
<td>Sheet Metal, Air, Rail, Transportation Workers Local Union 105</td>
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<tr>
<td>TNT Plastic Molding</td>
<td>725 E Harrison Street</td>
<td>Corona, CA 92879</td>
<td>No</td>
</tr>
</tbody>
</table>
April 10, 2015

Executive Director
Employment Training Panel
1100 J Street, 4th Floor
Sacramento, CA 95814

Re: Application to the Employment Training Panel

Dear Executive Director of the Employment Training Panel,

Local Union 105 supports the application to the Employment Training Panel from Superior Duct Fabrication, Inc.

Sincerely,

Rocky Pelliccino
Vice President/Business Representative

MRPMat/Superior Duct Fabrication Inc Employment Training Panel 040915
opeiu #537
aft-cio,clc
RETRAINEE - JOB CREATION
Training Proposal for:
nanoPrecision Products, Inc.
Agreement Number: ET16-0182

Panel Meeting of: September 25, 2015
ETP Regional Office: North Hollywood  Analyst: E. Wadzinski

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
<th>Priority Industry:</th>
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<tbody>
<tr>
<td>Retrainees</td>
<td>Manufacturing Nanotechnology</td>
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<td>SB &lt;100</td>
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<tr>
<td>Priority Rate</td>
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<tr>
<td>Job Creation Initiative</td>
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<table>
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<th>Counties Served:</th>
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<td>Los Angeles, Ventura</td>
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<thead>
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<th>Union(s):</th>
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<tr>
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<table>
<thead>
<tr>
<th>Number of Employees in:</th>
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<tbody>
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<td>CA: 60</td>
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Turnover Rate: 5%
Managers/Supervisors: 10%

FUNDING DETAIL

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<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
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<td>$207,480</td>
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In-Kind Contribution: 100% of Total ETP Funding Required $412,542
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
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**Minimum Wage by County:** $15.97 for Los Angeles County; $15.07 for Ventura County

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

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

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

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOB 1 - Retraineep</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engineer I - IV</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Engineer IV - V</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Engineering Managers I</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Engineering Managers II</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Machinists</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Manufacturing Engineers</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Manufacturing Managers</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Administration</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Administration Managers</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Senior Managers</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Technicians/QA Inspector</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

nanoPrecision Products, Inc. (nPP) (www.nanoprecision.com) is a high-technology, precision manufacturing company with 60 employees. The product development center is located in Camarillo, and the prototyping and manufacturing center in is El Segundo. The Company manufactures ultra-high, precision products for the medical, telecommunications, and military/aerospace industries. Since its incorporation in 2002, nPP has been conducting critical research in the core technologies for large volume, high speed, and nano-scale tolerance manufacturing.

This will be nPP’s third ETP Agreement. The Company’s first ETP Agreement provided Computer and Manufacturing Skills to support its early manufacturing efforts by standardizing processes, teaching Teamcenter software to manage product life cycle, CAD/CAM software to design products, and fundamentals of high tech machinery and product assembly. In the most current ETP Agreement nPP continued to move from its initial Research & Development (R&D) and early production phase into the manufacturing and product qualification stages. The Company also added 11,000 sq. ft. to the El Segundo facility, and installed high speed, high-precision mechanical presses, electro-chemical surface treatment machines, and automated assembly equipment.

Although nPP started the process to begin manufacturing, which led to the hiring of 20 new staff, due to new developments in these manufacturing processes the implementation of these changes has taken longer than expected. The Company continues to expand, including equipment investments of 3.5 million in in 2014 and 1.7 million in 2015. nPP is also upgrading their NX CAD design software system from the 8.5 version to the new 10.5 version, which will require training for all design personnel.

Retrainee - Job Creation

In this proposed Agreement, training will include processes related to the new 3 and 4 axis CNC milling machines, 2 punch presses and the automation and singulation and packing machines. The addition of this equipment necessitates training for six to ten new positions in the tool room, along with five new technical and support positions. These new positions are needed to support nPP’s effort in bringing its tooling functions in house to be able to control manufacturing quality and efficiency.

nPP has committed to hiring 15 new employees within the next two years (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.
PROJECT DETAILS

All employees in R&D, manufacturing, and support functions will need training to strengthen skills in the following:

Business Skills (5%): Training will be provided to all occupations. nPP continues to define its administrative processes and practices. Administrative personnel will be provided with training to upgrade their skills and practices. During the prior Agreement, nPP was not able to implement an ERP system, but plans on doing so within the term of this Agreement and will provide training for all employees.

Computer Skills (35%): Training will be provided to all occupations. Training will be on-going in technical areas, as upgrades to the 10.5 version of NX CAD Design software will be implemented. Technical staff will also receive training on software programs that include: Geomagic Control, Geometric Dimensioning & Tolerance techniques, MatLab, Zygot programming. These programs are part of our regular operations and provided to newly-hired employees based on training needs.

Continuous Improvement (15%): Training will be provided to all occupations. Training will focus on internal business systems and functionality resulting in the elimination of duplicate processes, and a more efficient business environment, product improvement, delivery times, waste reduction and profitability.

Hazardous Materials (5%): Training will be provided to Machinists, Technicians, Engineers and Technicians. Training will provide focus on how to manage hazardous materials in relation to production, as well as with experiments on new techniques, materials and technology.

Management Skills (5%): This training will only be provided to Managers. Training will include leadership in a growing environment and how to work together effectively as a team. Technical Managers will be provided with skills to motivate individual departments to achieve the department and company goals.

Manufacturing Skills (35%): Training will be provided to Technicians/QA Inspectors, Machinists, Engineering and Manufacturing Staff. Training will address the new equipment related to manufacturing and the in-house expansion in tooling previously outsourced.

Temporary to Permanent Hiring

The trainees in Job Number 2 fall under Panel guidelines for “temporary to permanent” employment. nPP has retained these employees through a temporary agency, with the intention of hiring them into full-time, permanent positions after training.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. However, the retention and post-retention wage requirements cannot be satisfied until after trainees have been hired by nPP. Until then, the nPP will not receive progress payments

Training Hours Limitation

Small business retraining is normally capped at 60 hours per trainee; however, nPP is requesting a modification of the cap to deliver up to 200 hours of training per person. The Contractor states that training in technical skills are dynamic and there is a constant upgrade to the processes and software that is used to keep this technology at a level above and to continue to grow the innovations achieved. nPP is at a stage where now that they have proved
technological theories they have discovered, they need to apply those theories to the practical production methods. Since the tolerances nPP has achieved have never been done, innovation, training of manpower is critical to their success. Training on new manufacturing equipment will be in excess of 200 hours, and training on the NX CAD Design software can be in excess of 60 hours which supports nPP’s request. These two types of training alone support nPP’s request to modify the 60 hour training cap to support nPP’s training plan.

**Commitment to Training**

nPP has a training budget of approximately $250,000 per year for both facilities, and delivers courses in regulatory compliance, computer software skills, and technical job skills. nPP provides on the job training and new hire orientation. nPP also trains in company Standards, Processes and Procedures.

ETP-funded training will allow nPP to grow, meet customer and industry standards with quality products, and ensure that staff is well versed in the latest technology. Training will provide workers an in-depth understanding of nPP’s processes, procedures and manufacturing techniques.

nPP represents that 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**
  nPP has a detailed training plan focused on new equipment and lean manufacturing processes. The Company’s Director of Human Resources & Administration and the Advanced Applications Engineer are involved in overseeing the administration and training implementation process for this project.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0158</td>
<td>$208,000</td>
<td>09/30/13 – 09/29/15</td>
<td>50</td>
<td>60</td>
<td>42</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 7,260 reimbursable hours have been tracked for potential earnings of $188,760 (91% of approved amount). Although training ended on June 30, 2015, the Contractor is in the process of collecting and entering the final batch of rosters for ETP eligible trainees and projects final earnings of 95 to 100%.

**PRIOR PROJECTS**

The following table summarizes performance by nPP under an ETP Agreement that was completed within the last five years:
<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0142</td>
<td>El Segundo &amp; Camarillo</td>
<td>09/06/12 – 09/05/13</td>
<td>$49,920</td>
<td>$49,920 (100%)</td>
</tr>
</tbody>
</table>

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

N/A
Exhibit B: Menu Curriculum

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

BUSINESS SKILLS
- Project Management
- Business Skills Training
- Program/Project Management Skills
- Technical Product Specifications

COMPUTER SKILLS
- Teamcenter Express
- Teamcenter Express Supervision
- NX 10.5 Unigraphics CAD/CAM (Intermediate, Advanced, Manufacturing)
- Workforce Development - Software Implementation
  - Qindos – Metrology Measurement
  - MatLab – Mathematical Analysis tool
  - Geomagic – Geometric Analysis Tool
  - Simufact – Metal Forming Simulation Tool
  - Marc/Mentat Simulation
- nPP Standards
- Microsoft Project
- Quickbooks
- Statistical Analysis

CONTINUOUS IMPROVEMENT
- ISO 90001/AS9100
- Lean Manufacturing/Process Improvement
- Team Problem Solving/Leadership
- Technical Accuracy

HAZARDOUS MATERIALS SKILLS
- Laser Safety
- Hazardous Waste

MANAGEMENT SKILLS (Managers only)
- Leadership Training, Coaching
- Performance Appraisal Training

MANUFACTURING SKILLS
- Coordinate Measuring Machine (CMM)
- Talyssurf (surface measurement)
- Inspection Tools and Methodology
- Fiber Optic Cable Assembly Training
- Forklift Operation Training & Certification
- CNC Machine
- Equipment Operation and Maintenance
- Grinding
Safety Training cannot exceed 10% of total training hours per-trainee.

Note: Reimbursement for retraining is capped at 200 hours total per-trainee, regardless of method of delivery.
Training Proposal for:
New Technology Training Institute
Agreement Number: ET16-0154

Panel Meeting of: September 25, 2015
ETP Regional Office: North Hollywood  Analyst: E. Fuzesi

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
<th>SB &lt;100</th>
<th>SET</th>
<th>HUA</th>
<th>Industry Sector(s):</th>
<th>Services</th>
<th>Green Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>□ Yes</td>
<td>□ No</td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Los Angeles, Ventura, San Diego, Orange</td>
<td>Repeat Contractor:</td>
<td>□ Yes</td>
<td>□ No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>□ Yes □ No</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>≤20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors: (% of total trainees)</td>
<td>≤20%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL:

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>$90,200</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Costs</td>
<td>$6,255 8%</td>
</tr>
<tr>
<td>Total ETP Funding</td>
<td>$96,455</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 50% of Total ETP Funding Required: $86,570
TRAINING PLAN TABLE

| Job No. | Job Description | Type of Training          | Estimated | Range of | Average | Post- |
|---------|-----------------|---------------------------|-----------| Hours    | Cost per | Retention |
|         |                 |                           | No. of    |          | Trainee  | Wage  |
|         |                 |                           | Trainees  |          |          |       |
| 1       | Retrainee       | Commercial Skills         | 45        | 8-200    | 0        | $1,155 | $20.55 |
|         | Priority Rate   |                           |           |          | Weighted Avg: 60 | |
|         | SET             |                           |           |          |          |       |
| 2       | Retrainee       | Commercial Skills         | 16        | 8-200    | 0        | $2,780 | $11.30 |
|         | Priority Rate   |                           |           |          | Weighted Avg: 100 | |
|         | SET             |                           |           |          |          |       |
|         | HUA SB<100      |                           |           |          |          |       |
|         | Priority Rate   |                           |           |          |          |       |

Minimum Wage by County: Job Number 1 (SET Frontline): $20.55 statewide. Job Number 2 (SET HUA): $11.30 per hour for Ventura County; $11.95 per hour for San Diego County; $12.02 per hour for Orange County; and $11.98 per hour for Los Angeles County.

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

Used to meet the Post-Retention Wage?: □ Yes □ No □ Maybe Participating employers may use health benefits to meet the Post-Retention Wage.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Number 1 Solar Energy Practitioner</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>Job Number 2 Solar Energy Practitioner</td>
<td>16</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1999, New Technology Training Institute (NTTI) is a private, for-profit training agency specializing in training Solar Energy Practitioners. In the past, the school has trained IT professionals in various computer certification programs for Southern California employers. However, since 2009, NTTI has been focusing on the Solar Energy Practitioner Program, targeting the renewable energy industry due to a growing demand in that field.

NTTI is accredited by the North American Board of Certified Energy Practitioners (NABCEP) and the Council on Occupational Education (COE). NTTI is also approved by Bureau for Private Postsecondary Education, and endorsed by various governmental agencies such as Employment Development Department (EDD), Workforce Investment Act (WIA), Trade readjustment Allowances (TRA), Veteran Administration (VA), the South Bay Workforce Investment Board, and I-Train.

NTTI is eligible to contract with ETP as a private training agency. NTTI’s core group represents 98% of the requested funding. This is NTTI’s fifth Agreement with ETP.
PROJECT DETAILS

In recent years, solar energy systems have become economically feasible due to technological breakthroughs that have increased efficiency and output of solar panels. The improved technology has allowed for cost reduction and more efficient solar panels and the development of wireless inverters and charge controllers. These technological developments create the need for new workforce skills as NABCEP adjusts the learning objectives of the certification program to reflect changes in technology.

Incentives from utility companies and government entities have also contributed to the decrease in cost of solar systems. It has led to a very rapid growth of this industry with an average of 25% annual revenue growth in recent years, according to the American Solar Energy Society. The popularity of solar panels, in turn, has raised the need for skilled and certified practitioners to install and service solar panels and related equipment in homes and businesses.

Training Plan

NTTI will provide a structured training program to help employers upgrade employee skill sets, and earn an industry-recognized certificate from an accredited institution. Additionally, Small businesses are rarely able to conduct thorough training on their own due to time and budget constraints. Training usually only consists of basic job skills to complete a particular job. According to the Contractor's market research and assessment, while small business employers require more skills from their workforce, they do not have the necessary expertise, resources or qualifications to provide needed training.

NTTI's Curriculum was developed according to NABCEP standards. The 100-hour program is center-based, consisting of classroom theory and hands-on lab. It was designed to provide a solid foundation of basic skills for entry level practitioners including mechanical/electrical design and installation and maintenance/troubleshooting of modules, inverters, and other components.

Commercial Skills (100%) – Training will be offered to all trainees to learn industry and market requirements. Photovoltaic (PV) Applications and Safety Basics modules help students identify common types of PV system applications, safety hazards, and practices. Electricity Basics and Solar Energy Fundamentals define basic terminology, and explain best practices, key electrical parameters, and outputs. System Components modules teach principles of component operations, functions, and specifications while System Sizing principles cover the factors, values and effects of power and energy production using calculations and online tools to meet customer objectives. Mechanical Design includes roofing system requirements and weather sealing methods. Other modules in the Curriculum cover electrical diagrams, PV configuration, electrical conductors, grounding, labeling, and requirements for permits, inspections, and code-compliance.

Impact/Outcome

Students will demonstrate a basic understanding of PV systems and prepare for the NABCEP PV Entry Level exam. Candidates must demonstrate knowledge of the fundamental principles of the application, design, installation and operation of PV Systems to be certified.

Commitment to Training

NTTI represents that 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

Two qualified in-house trainers (NABCEP certified, real-life work experience, and extensive teaching experience) will provide the training. One full-time staff and one-part time staff will be in charge of general administration, scheduling training, ETP administration, recruitment, and needs assessments.

Special Employment Training (SET)

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

HUA

All trainees in Job Number 2 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The participating employers’ locations in Los Angeles, Ventura, Orange, and San Diego Counties qualify for HUA status under these standards.

Wage Modification

These trainees in Job Number 2 qualify for the Standard ETP Minimum Wage rather than the Statewide Average Hourly Wage. The Panel may also modify/reduce the ETP Minimum Wage for these trainees by up to 25% if post-retention wages exceed the start-of-training wages. NTTI is requesting the wage modification to the reduced standard wage of $11.30 per hour for Ventura County; $11.95 per hour for San Diego County, $11.98 per hour for Los Angeles County; and $12.02 per hour for Orange County. Trainees in this proposal work in entry level positions, looking to increase their marketability and opportunity for wage progression. Earning their NABCEP Certificate will enable them to earn higher wages in the competitive field of solar energy.

Marketing and Support Costs

NTTI is requesting 8% support costs. The majority of NTTI's marketing is conducted through advertisements in industry-specific publications and online. The school also maintains extensive relationships with EDD, various Worksource Centers, Workforce Investment Boards, veteran representatives, and a network of private companies and business associations. Support Costs will cover NTTI's marketing efforts, and recruitment of additional participating employers. Staff recommends the 8% support costs.

Training Agency Certification

Training agency eligibility requires certification by an independent third-party, as required for the type of school and course of study. Most schools must also be licensed by the Bureau of Private Postsecondary Education (BPPE), created in statute effective January 1, 2010.

In keeping with the Panel's standards, NTTI is eligible as a training agency based on the following:
- BPPE licensure valid until September 30, 2015
- Certification by NABCEP
- Approval for WIA funding under the I-TRAIN program
- Successful past performance with ETP
Tuition Reimbursement

In accordance with Title 22, California Code of Regulations, Section 4412.1, NTTI represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0420</td>
<td>Los Angeles</td>
<td>6/30/13-6/29/15</td>
<td>$67,970</td>
<td>$67,970 (100%)</td>
<td></td>
</tr>
<tr>
<td>ET12-0180</td>
<td>Los Angeles</td>
<td>11/28/11-11/27/13</td>
<td>$93,380</td>
<td>78,399 (84%)</td>
<td></td>
</tr>
<tr>
<td>ET09-0475</td>
<td>Los Angeles</td>
<td>3/9/09-3/8/11</td>
<td>$135,750</td>
<td>$14,681 (11%)</td>
<td></td>
</tr>
</tbody>
</table>

ET09-0475: This New Hire only Agreement was designed to train and place 10 Computer Engineers, and 30 Home Health Aides and Nurse Assistants. Training was 190 to 200 hours per person and included another CalWORKS Welfare-to-Work component. 18 trainees were enrolled, and four (4) were placed into employment eligible for reimbursement.

After training began, the Contractor determined that wages for Home Health Aides and Nurse Assistants were declining to well below the ETP minimum wage requirement. Consequently, NTTI was not able to place any of these trainees into appropriate employment. NTTI subsequently requested an Amendment to delete these two occupations from the contract, and instead created a Job Number for 26 Solar Energy Practitioners, a demand occupation.

After the Amendment was approved, the Contractor had seven months to complete training. NTTI enrolled four trainees, of which three completed training and one completed retention. There was insufficient time to recruit, train, place, and retain unemployed trainees once the Amendment was approved.

After experiencing the risks and difficulties of administering a New Hire program, NTTI discontinued New Hire training and designed a more conservative training plan for just one occupation, Solar Energy Practitioner.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

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

COMMERCIAL SKILLS
- Photovoltaic (PV) Markets and Applications
  - History of PV Technology and Industry
  - Markets and Applications for PV
  - Types of PV Systems
  - Associate Key Features and Benefits of PV with Applications

- Safety Basics
  - Safety Hazards of Operational and Non-Operational PV Systems
  - Safety Hazards, Practices and Protective Equipment During PV System Installation and Maintenance

- Electricity Basics
  - Difference between Energy and Power
  - Basic Electrical Terms
  - Use of Digital Multi-Meter
  - Calculation of Simple Circuit Values

- Solar Energy Fundamentals
  - Basic Solar Terms
  - True (Solar) South & Magnetic (Compass) South Given a Declination Map
  - Basic Solar Movement and Effect of Earth Tilt
  - Solar Position Using Solar Path Diagrams
  - Angular Effects on the Irradiance of Array
  - Factors that Reduce/Enhance Solar Irradiation
  - Average Solar Irradiation on Various Surfaces
  - Conversion of Solar Irradiation into a Variety of Units
  - Effect of Horizon on Solar Irradiation
  - Use of Solar Pathfinder or Sun Charts

- PV Module Fundamentals
  - How a Solar Cell Converts Sunlight into Electric Power
  - Key Points on a Typical IV Curve
  - Key Output Values of Solar Modules Using Manufacturer Literature
  - Effect of Environmental Conditions on IV Curve
  - Effect of Series/Parallel Connections on IV Curve
  - Measurement Conditions for Solar Cells and Modules
  - Expected Output Values of Solar Module under a Variety of Environmental Conditions
  - Construction of Solar Cells of Various Manufacturing Technologies
  - Performance and Characteristics of Various Cell Technologies
  - Components and Construction of a Typical Flat Plate Solar Module
  - Calculate the Efficiency of a Solar Module
  - Purpose and Operation of Bypass Diodes
  - Typical Deterioration/Failure Modes of Solar Modules
  - Major Qualification Tests and Standards for Solar Modules
- **System Components**
  - Most Common Solar Module Mounting Techniques (Ground, Roof, Pole)
  - Features and Benefits of Different Solar Mounting Techniques
  - The Relationship between Solar Module Cell Temperature and Environmental Conditions
  - Purpose & Operation of Main Electrical Balance of System (BOS) Components (Inverter, Charge Controller, Combiner, Ground Fault Protection, Battery, Generator)
  - Key Specifications of Main Electrical BOS Components (Inverter, Charge Controller, Combiner, Battery, Generator)

- **PV System Sizing**
  - Interaction of Typical Loads with IV Curve
  - Load Demand for Stand-Alone and Grid Interactive Service
  - Typical System Electrical Output Derating Factors
  - Estimated Peak Power Output (Direct Current (DC) and Alternating Current (AC))
  - Array and Inverter Size for Grid-Connected System
  - Estimated Monthly and Annual Energy Output of Grid-Connected System
  - Relationship between Array and Battery Size for Stand-Alone Systems
  - Array, Battery and Inverter Sizes for Stand-Alone System

- **PV System Electrical Design**
  - Series/Parallel PV Array Arrangement Based on Module and Inverter Specifications
  - BOS Components Appropriate for Specific System Requirements
  - Voltage Drop between Major Components

- **PV System Mechanical Design**
  - Relationship between Row Spacing of Tilted Modules and Sun Angle
  - Mechanical Loads on a PV Array (Wind, Snow, Seismic)

- **Performance Analysis and Troubleshooting**
  - Typical System Design Errors
  - Typical System Performance Problems
  - Performance Problems & Typical Causes
  - Equipment Needed for Typical System Performance Analysis
  - Actual System Power Output vs. Rated or Expected Values
  - Typical Locations for Electrical/Mechanical Failure

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
## Participating Employers in Retrainee Multiple Employer Contracts

**Contractor's Name:** New Technology Training Institute  
**CCG No.:** ET16-0154

<table>
<thead>
<tr>
<th>Reference No: 15-0302</th>
</tr>
</thead>
</table>

**PRINT OR TYPE IN ALPHABETICAL ORDER**

<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s):</th>
<th>Estimated # of employees to be retrained under this Agreement:</th>
<th>Total # of full-time company employees worldwide:</th>
<th>Total # of full-time company employees in California:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>American Solar Direct</strong></td>
<td>217 N. Sunset Ave.</td>
<td>Industry, CA 91744</td>
<td>N/A</td>
<td>50</td>
<td>400</td>
<td>400</td>
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<tr>
<td><strong>Precise Air Systems</strong></td>
<td>5467 San Fernando Rd. West</td>
<td>Los Angeles, CA 90039</td>
<td>N/A</td>
<td>20</td>
<td>70</td>
<td>70</td>
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</tbody>
</table>
Training Proposal for:

QPE Technical Institute, Inc.

Agreement Number: ET16-0175

Panel Meeting of: September 25, 2015

ETP Regional Office: San Diego

Analyst: K. Campion

PROJECT PROFILE

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

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

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

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

FUNDING DETAIL:

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$200,696</td>
<td>$13,842</td>
<td>$214,538</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
<th>50% of Total ETP Funding Required</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$152,428</td>
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TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate</td>
<td>Mfg. Skills, Advanced Tech.</td>
<td>162</td>
<td>8 - 200</td>
<td>0</td>
<td>$885</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Class / Lab</td>
<td></td>
<td>CBT</td>
<td></td>
<td>$15.07</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Weighted Avg: 46</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Priority Rate SB &lt;100</td>
<td>Mfg. Skills, Advanced Tech.</td>
<td>64</td>
<td>8 - 200</td>
<td>0</td>
<td>$1,112</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Class / Lab</td>
<td></td>
<td>CBT</td>
<td></td>
<td>$15.07</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Minimum Wage by County: $15.07 per hour for Riverside and San Bernardino Counties; $15.93 per hour for San Diego County; $15.97 per hour for Los Angeles County; and $16.02 per hour for Orange County.

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

Used to meet the Post-Retention Wage?: ☐ Yes ☐ No ☑ Maybe Participating employers may use health benefits to meet the Post-Retention Wage.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOB NUMBERS 1 &amp; 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CNC Operator</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Set-Up Operator</td>
<td>68</td>
<td></td>
</tr>
<tr>
<td>Programmer</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Inspector</td>
<td>34</td>
<td></td>
</tr>
<tr>
<td>CAD-CAM Operator</td>
<td>27</td>
<td></td>
</tr>
<tr>
<td>Shop Lead</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Engineer</td>
<td>13</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1987 and located in Anaheim, QPE Technical Institute, Inc. (QPE) is a private postsecondary training agency that provides customized Manufacturing Skills training for Southern California employers (www.qpetech.com). QPE serves small to medium-sized machine shops with training such as Computer Numerical Control (CNC) machining; Computer-Aided Design/Computer Aided Manufacturing (CAD/CAM) programming; and dimensional metrology.
Participating employers design and manufacture special tools and machines, dies, jigs, fixtures, gauges, and precision-machined parts. They come from a variety of industries including aerospace, aircraft, computer technology, medical-devices, and electronics manufacturing.

QPE projects that approximately 80% of the proposed training will be delivered at its training facility in Anaheim and the remaining 20% of training will be conducted at participating employers’ facilities.

PROJECT DETAILS

Employer Demand

Due to advanced technological changes in the metal trades, there is an ongoing shortage of trained workers who have the necessary skills to operate complex CNC equipment. Advanced Coordinate Measuring Machine Programming, Solid Works CAD Modeling and Rapid Prototyping have introduced new materials and computer software applications to the machine-specific CAD programming environments. This leaves small businesses in particular with a critical lack of trained machinists. For example, high-speed manufacturing requires CAD Modeling, leaving “paper” blueprints in the past.

Training will be multi-disciplined with a focus on automated processes. To that end, QPE recently installed $125,000 in new equipment at its training facility. This includes CAD-CAM Software, computer workstations, a CNC Lathe machine, and a Coordinate Measuring Machine.

Customized Training

QPE conducts formal, shop floor assessments of each participating employer to identify the processes, types of equipment, types of CNC controls, programming methods, trainees’ knowledge and abilities, blue-print specifications, quality requirements and productivity levels. The shop floor assessment determines specific courses, training hours and skill levels needed for each participating employer. During and after training, QPE seeks feedback from the participating employers to ensure these needs are being met.

Training Plan

All training will be conducted via class/lab in the following:

Manufacturing Skills (79%) – This training will be provided to all occupations and includes topics such as Shop Math, Geometric Dimensioning & Tolerancing, CNC Set-Up & Operation, SPC, Introduction to CAD/CAM, and Fundamental Programming. This training is designed for workers who need to upgrade their skills as well as recently hired workers new to the industry who need specific job skills to be successful and efficient in their jobs.

Advanced Technology (21%) – This training will be provided to Senior-Level Operators, Programmers, Engineers, Inspectors and Shop Leads. The proposed AT training in topics such as Swiss CNC Lathe, CNC Programming, 3-D wire frame, Advanced Production Milling and Lathe, 4th and 5th Axis Milling, Advanced CAD/CAM Applications, and Rapid Prototyping will provide trainees knowledge and skills to program and run complex machining operations. QPE requests the AT priority reimbursement rate of $26 per hour for the AT courses identified in the curriculum due to the highly technical and complex nature of the course modules. QPE reports that the costs of AT training average $64 per trainee hour and the trainer-to-trainee ratio is 1:10 for AT, to allow in-depth coverage and personal attention from the instructor.
Marketing and Support Costs

QPE has a long relationship with the city of Anaheim, the City of Santa Ana and the County of Orange, South Bay Workforce Center. It is through these relationships that the training needs of local manufacturing industries are first identified. Additionally, QPE has developed strong relationships with hundreds of employers in the southern California area and uses these employers to identify specific training needs and develop curriculum accordingly.

QPE requests 8% support costs for program marketing and training-related activities including the recruitment of additional participating employers and assessment of employer-specific job requirements for retrainees. Staff recommends the 8% support costs.

Substantial Contribution

QPE serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer has received the benefit of training with payment earned in excess of $250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 30% to reflect a substantial contribution to the cost of training. Funding for any participating employer previously assessed a substantial contribution will be reduced by 50%. Small businesses with 100 or fewer full-time employees are not subject to this provision.

Training Agency Certification

Training agency eligibility requires certification by an independent third-party, as required for the type of school and course of study. Most schools must also be licensed by the Bureau of Private Postsecondary Education (BPPE), created in statute effective January 1, 2010. QPE is BPPE approved.

Tuition Reimbursement

QPE represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

Commitment to Training

ETP funds will not displace the existing financial commitment to training of participating employers. Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law. Employers in the machining industry typically provide no formal training to their production employees and have limited training budgets, particularly those job shops with fewer than 100 employees. Most small employers do not have the financial resources to establish an in-house training program. Training is generally limited to informal on-the-job training and new-hire orientation.

The proposed training is in response to acute customer requirements, and therefore, will not duplicate any past or current training efforts. Some returning trainees who received Manufacturing Skills training in the prior agreement will now receive Advanced Technology, based on the employer’s specified needs. QPE may also provide training to a repeat employer with employees that did not participate in prior contracts.

The proposed training will provide workers in-depth training in the most proficient use of computerized machine tools, which will allow manufacturers to increase their technical
capabilities to ensure current customer satisfaction is maintained, while increasing the potential for securing new customers with higher complexity requirements.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0376</td>
<td>Anaheim</td>
<td>6/03/13 – 6/02/15</td>
<td>$214,440</td>
<td>$180,325</td>
<td>(84%)</td>
</tr>
<tr>
<td>ET11-0227</td>
<td>Anaheim</td>
<td>6/07/11 – 6/06/13</td>
<td>$178,454</td>
<td>$165,755</td>
<td>(93%)</td>
</tr>
</tbody>
</table>

**DEVELOPMENT SERVICES**

N/A

**ADMINISTRATIVE SERVICES**

N/A

**TRAINING VENDORS**

None
Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200 Trainees may receive any of the following:

MANUFACTURING SKILLS

- Shop Mathematics
- Blueprint Reading
- Measuring Instruments
- Manufacturing Materials
- Geometric Dimensioning and Tolerancing
- Statistical Process Control (SPC)
- Surface Plate Setups
- CNC Mill Set up & Operation
- CNC Lathe Set up & Operation
- Fundamental Programming
- Introduction to CAD/CAM

AT Hours

8 – 200

ADVANCED TECHNOLOGY

- Advanced Programming Techniques
- 3D Wire Frame Applications
- Geometry Creation in CAD/CAM
- Posting CNC Programs
- Advanced Production Milling & Lathe
- 4th & 5th Axis Milling
- Swiss CNC Lathe
- Advanced Geometric Dimensioning & Tolerancing
- Advanced Coordinate Measuring Machine Programming
- Composite Modeling and Manufacturing
- Rapid Prototyping
- Advanced CAD/CAM Applications & Modeling
- Solid Works Modeling Software Applications

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
Rich Products Corporation
Agreement Number: ET16-0178

Panel Meeting of: September 25, 2015
ETP Regional Office: San Diego           Analyst: J. Davey

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Priority Rate Retraine</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 800</th>
<th>U.S.:8,700</th>
<th>Worldwide: 9,200</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>2%</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors:</th>
<th>(% of total trainees)</th>
<th>19%</th>
</tr>
</thead>
</table>

FUNDING DETAIL

Program Costs: $141,768
(Substantial Contribution): $0
(High Earner Reduction): $0

Total ETP Funding: $141,768

In-Kind Contribution: 100% of Total ETP Funding Required: $165,396
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority rate</td>
<td>Business Skills, Computer Skills, Continuous Impr., Manufacturing Skills</td>
<td>179</td>
<td>8-200</td>
<td>0</td>
<td>$792</td>
</tr>
</tbody>
</table>

Minimum Wage by County: $16.02 per hour for Retrainees for Orange County

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

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

Up to $2.02 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Staff</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Frontline Supervisors</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td>16</td>
<td></td>
</tr>
<tr>
<td>Managers</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Materials Staff</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>Production Associates</td>
<td>94</td>
<td></td>
</tr>
<tr>
<td>Quality Staff</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1945 and headquartered in Buffalo, NY, Rich Products Corporation (Rich Products) (rich.com) developed the world’s first frozen non-dairy whipped topping. Today, the Company also produces bakery items; shrimp/seafood; appetizers/snacks; meatballs; and pasta. The new product line includes gluten-free and all-natural food items. Rich Products is a global company, with facilities on five continents. Its products are sold to the food service industry, in-store bakeries, and retail marketplaces including Costco, Wal-Mart, California Pizza Kitchen, and Smart-n-Final.

PROJECT DETAILS

Rich Products has seen substantial growth over the last several years as the market for specialty baked goods has increased. In keeping with this growth, the Company purchased Goglanian Bakeries in 2012, with facilities in Santa Ana.

After the ownership transition, many new quality-control and advanced manufacturing systems were put in place to improve operational capabilities and keep costs to a minimum. In addition, regulations in food manufacturing have become more strict. Training will take place at the former Goglanian plant in Santa Ana where a new manager has been retained.
Training Plan

**Business Skills (4%)**: This training will be offered to Administrative Support Staff, Quality and Supervisory Staff. Training will provide skills that will help employees become more proactive and customer-focused.

**Computer Skills (8%)**: This training will be offered to Administrative Support Staff, Materials Staff, and some Frontline Supervisors. Training will cover the new Rich computer networking procedures. Intermediate and Advanced Microsoft Office programs of Access, Excel and PowerPoint will also be delivered.

**Continuous Improvement (66%)**: This training will be offered to all occupations. Training in Lean Enterprises, Total Productive Maintenance, Team Building, Problem Analysis, Process Improvement, and Statistical Process Control and leadership will help the Company reduce costs, errors, inventory levels, and product cycle times.

**Manufacturing Skills (22%)**: This training will be offered to Production Staff. Due to increasing complexity of equipment and systems, trainees will need skills to implement new methods and procedures as Lean Enterprises and Good Manufacturing Practices become the driving focus of the operations. Training will increase productivity and quality and decrease downtimes.

**Commitment to Training**

Rich Products represents that ETP funds will not displace the existing financial commitment to training. The Company spends approximately $25,000 annually per facility in California for HAZMAT, OSHA, Top-Level Leadership, software training and various corporate training for managers, production skills, and food safety training. Safety training will also continue to be provided in accordance with all pertinent requirements under state and federal law.

- **Training Infrastructure**

  Kirkpatrick Enterprises International will provide contract administration, as noted below. The Santa Ana plant manager, who is familiar with ETP-funded training, will act as liason.

**RECOMMENDATION**

Staff recommends approval of this proposal.
PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
<th>%</th>
</tr>
</thead>
</table>

*ET12-0431 – (Rich Products) This project was developed for the Company’s Northern California locations just before it acquired Goglanian Bakeries in Santa Ana. Training was delayed due to labor disputes at the Santa Fe Springs location and the hiring of a new management team at the Fresno location. The Company has stabilized since the acquisition and the issues at Santa Fe Springs and Fresno have been resolved. (None of these three locations is included in the current proposal.)

**ET12-0170 – (Goglanian Bakery) This contract was initially held by Goglanian Bakeries and was assumed by Rich Products midway through the term as part of the acquisition. After the acquisition, training was put on hold, as the focus shifted prior to ownership transition. In the current proposal, Rich Products is requesting less than half of the amount of this Agreement, so that it can demonstrate positive performance at the location in Santa Ana.

DEVELOPMENT SERVICES

Rich Products retained Kirkpatrick Enterprises International in Valencia to assist with development of this proposal for no charge.

ADMINISTRATIVE SERVICES

Rich Products also retained Kirkpatrick Enterprises International to perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

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

**BUSINESS SKILLS**
- Business Operations & Procedures
- Business Communication
- Advanced Customer Relationship Skills

**COMPUTER SKILLS**
- Distribution Requirement Planning (DRP) Reporting Software
- Continuous Process Improvement Software
- MS Office – Intermediate/Advanced

**CONTINUOUS IMPROVEMENT**
- Lean Manufacturing/Six Sigma
- Total Productive Maintenance
- SPC (Statistical Process Control)
- Leadership Skills for Frontline Workers

**MANUFACTURING SKILLS**
- Production Equipment Operation
- Maintenance Skills
- Food Safety
- GMP (Good Manufacturing Practices)

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

Rockview Dairies, Inc. dba Rockview Farms

Agreement Number: ET16-0167

Panel Meeting of: September 25, 2015

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

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

<table>
<thead>
<tr>
<th>Counties Served</th>
<th>Los Angeles</th>
</tr>
</thead>
</table>

Repeat Contractor: 

<table>
<thead>
<tr>
<th>Union(s)</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Teamsters Local Union No. 63</td>
<td></td>
</tr>
</tbody>
</table>

Number of Employees in: CA: 300, U.S.: 300, Worldwide: 300

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>10%</th>
</tr>
</thead>
</table>

| Managers/Supervisors: (% of total trainees) | 13% |

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$222,750</td>
<td>$0</td>
<td>$0</td>
<td>$222,750</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
<th>100% of Total ETP Funding Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>$302,500</td>
<td>$302,500</td>
</tr>
</tbody>
</table>
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainer Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Imp., HazMat, Mfg. Skills</td>
<td>275</td>
<td>8-200</td>
<td>$810</td>
<td>$19.39</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $15.97 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

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Driver</td>
<td>70</td>
<td></td>
</tr>
<tr>
<td>Warehouse Staff</td>
<td>39</td>
<td></td>
</tr>
<tr>
<td>Production Staff</td>
<td>71</td>
<td></td>
</tr>
<tr>
<td>Engineer</td>
<td>16</td>
<td></td>
</tr>
<tr>
<td>Fleet Maintenance Staff</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Quality Systems Staff</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>Sales/Marketing Staff</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Manager/Supervisor</td>
<td>36</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Rockview Dairies, Inc. dba Rockview Farms (Rockview) ([www.rockviewfarms.com](http://www.rockviewfarms.com)) was founded in 1927 and in 1965 Pete DeGroot acquired the Company. Rockview is an independent, family-owned dairy manufacturer. For decades, the Company has produced, processed, packaged and distributed dairy products such as milk, organic milk, butter, buttermilk, cottage cheese, cream, sour cream, yogurt, and eggnog. Rockview also offers juices, fruit drinks, water, tea, eggs and other dairy products.

The Company distributes products to the food service industry, school districts, and independent markets, along with retail customers, drive-thru dairies and home delivery. The Company operates two facilities in California: Downey and Southgate. This proposal will target workers from both facilities. This will be Rockview’s first ETP Agreement.
Rockview faces several challenges that drive the need for training: customer demand, remain competitive, quality products, industry requirements, new processes, skilled workforce and technology advances. To adapt to these challenges, Rockview is requesting ETP funding to train 275 employees. ETP funds will allow its workforce to develop the skills necessary to address these challenges and put the Company in a better position to compete.

Union Support

ETP has received letter of support from Teamsters Local Union No. 63 for Drivers, Warehouse, Production and Fleet Maintenance Staff.

PROJECT DETAILS

Rockview’s goal is to become a value-focused, customer-driven organization and a high performance workplace. To stay competitive, Rockview has developed a formalized strategic training plan that will introduce cross-training, improve standard operating procedures, implement improved manufacturing processes, and support of new technologies and systems, design a quick turn-around delivery system, and improve customer service and business operation. The proposed project will better equip staff with enhanced skills in change management, continuous improvement, leadership and manufacturing efficiency.

Training Plan

ETP funds will help the Company deliver formalized training to its workforce, for the first time. Training will upgrade worker job skills, help the Company keep up with technological advances, improve the efficiency and quality of production, sales, and administrative work. Training will take place at Rockview facilities in Downey and Southgate. Training will be provided by in-house subject matter experts, and outside vendors may be identified during the term of the proposed Agreement.

Rockview proposes to train its employees in the following:

**Business Skills** (10%) – Training will be offered to Managers/Supervisors, Administrative and Sales/Marketing Staff to increase product knowledge, sales, time management. Training will provide customers with the highest quality service possible to help transition staff to a high performance workplace.

**Computer Skills** (5%) – Training will be offered to all occupations. Training will include Microsoft Office programs to improve internal and external communications.

**Continuous Improvement** (20%) – Training will be offered to all occupations to improve product quality and reduce costs while moving to the high performance workplace.

**Hazardous Materials** (5%) – Training will be offered to Managers/Supervisors, Engineer, Drivers, Warehouse, Production, Fleet Maintenance and Quality Systems Staff to learn the proper techniques and knowledge for handling hazardous materials and waste cleaning.

**Manufacturing Skills** (60%) – Training will be offered to Drivers, Engineers, Managers/Supervisors, Warehouse, Production, Fleet Maintenance and Quality Systems Staff to cross-train for greater production, delivery flexibility, and meets customer expectations.
Commitment to Training

Rockview has an annual training budget of approximately $75,000. The Company’s current training consists of Six Sigma Training, Dale Carnegie (Leadership), food safety, new hire orientation, production equipment, mandated safety training and sexual harassment prevention. Most training is delivered via class/lab, on-the-job training.

ETP funds will support Rockview’s ongoing financial commitment in training. After the completion of the ETP program, Rockview is committed to continuing the quality and frequency of employee training.

Rockview represents that 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 enlisted National Training Systems (NTS) to support its administrative efforts. Rockview’s Director of Safety will coordinate with NTS to secure rosters, provide trainee enrollment data, verify training and retention completion, participate in ETP monitoring activities, and ensure compliance with all ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

NTS in Ladera Ranch assisted with development of this proposal for a flat fee of $11,404.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200  Trainees may receive any of the following:

BUSINESS SKILLS
- Change Management
- Customer Service
- Performance management
- Performance Metrics
- Product Knowledge
- Project Management
- Sales Skills
- Strategic Planning & Policy Deployment

COMPUTER SKILLS
- Microsoft Office Skills (Intermediate & Advanced)

CONTINUOUS IMPROVEMENT
- Leadership Skills
- Process Improvement
- Production Workflow
- Quality Improvement

HAZARDOUS MATERIALS
- Hazardous Materials/Hazardous Waste
- Sanitation & Chemical Clean Up

MANUFACTURING SKILLS
- Cross-Training
- Good Manufacturing Practices
- Lean Manufacturing Processes
- Machine Operations
- Machine Maintenance
- Preventative Maintenance
- Standard Operating Procedures
- Safe Quality Foods
- Organic Processes and Testing

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.
July 7, 2015

Employment Training Panel
1100 J Street, 4th Floor
Sacramento, California 95814

To Whom It May Concern:

This letter is to confirm the support of Teamsters Local 63 for Rockview Farms training proposal as submitted to the Employment Training Panel.

For the Union,

Carlos Barnett
Business Representative
Teamsters Local No. 63
CB/Is
Training Proposal for:
Southern California Permanente Medical Group, Inc.
dba Kaiser Permanente
Agreement Number: ET16-0164

Panel Meeting of: September 25, 2015
ETP Regional Office: North Hollywood  Analyst: M. Webb

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Medical Skills Training Priority Rate Retrainee SET</th>
<th>Industry Sector(s): Healthcare Services</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Priority Industry: ☑ Yes ☐ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Los Angeles, Orange, Riverside, San Bernardino, San Diego, Kern</th>
<th>Repeat Contractor: ☑ Yes ☐ No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Union(s): ☑ Yes ☐ No</td>
<td>United Healthcare Workers West and UFCW Local 324</td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 64,000 U.S.: 174,000 Worldwide: 174,000</td>
<td></td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>% of total trainees N/A</td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$749,520</td>
<td>$112,428 15%</td>
<td>$0</td>
<td>$637,092</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine Medical Skills Training</td>
<td>Commercial Skills, Computer Skills, Continuous Improvement, MST-Didactic</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,041</td>
<td>8-200</td>
<td>0-100</td>
<td>*$612</td>
</tr>
</tbody>
</table>

*Reflects Substantial Contribution

**Minimum Wage by County:** Statewide (Priority Industry): $20.55 per hour

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

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

Up to $2.89 per hour may be used to meet the Post-Retention Wage.

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Support Staff</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Clerical Staff</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Data Processing and Computer Operations Staff</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Health Care Analysts</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Licensed Vocational Nurses</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td>Patient Care Aides/Assistants</td>
<td>160</td>
<td></td>
</tr>
<tr>
<td>Patient Care Support Staff</td>
<td>155</td>
<td></td>
</tr>
<tr>
<td>Registered Nurse</td>
<td>150</td>
<td></td>
</tr>
<tr>
<td>Technicians/Technologists</td>
<td>206</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Southern California Permanente Medical Group, Inc. dba Kaiser Permanente (Kaiser) ([www.kp.org](http://www.kp.org)) was established in 1943 and began open enrollment to the public in 1945. The Medical Group operates under three corporate umbrellas; Kaiser Foundation Health Plans, Kaiser Foundation Hospitals and Permanente Medical Groups. Training under this Agreement will be delivered to employees of the Southern California Permanente Medical Group.

Kaiser has 14 medical centers, 214 medical offices, and serves more than four million members in Southern California. Union support letters have been provided by the United Healthcare Workers West and UFCW Local 324.
PROJECT DETAILS

This will be the ninth Agreement between ETP and Kaiser. Only newly hired nursing staff was trained under the last Agreement (ET14-0117). However, since then, Kaiser has increased membership by an estimated 10% (400,000 new members). To handle membership volume, Kaiser has recruited new medical and administrative staff. These employees were not hired in the “window period” for Job Creation, but they will be included in this training project.

In addition, following implementation of the Affordable Care Act (ACA) in 2013. Kaiser must provide quality healthcare services at lower costs. The Hospital has adopted new processes throughout all departments to meet this challenge. Training in these processes will be delivered to allow Nurses, Patient Care Aides, and Technicians to shift from one departments to another as needed for cost efficiency.

Trainees will also receive extensive training in medical skills to ensure protocol, and the latest methods are being applied. Furthermore, training in Computer Skills and Continuous Improvement will improve skill sets of staff to eliminate errors, support patient care and increase efficiency.

Training Plan

**Commercial Skills** (10%): Training will be offered to all occupations to ensure staff is in compliance with Kaiser systems and processes such as documentation standards and procedures, patient safety procedures and healthcare enrollment.

**Computer Skills** (20%): Training will be offered to all occupations to improve use of software systems used by Kaiser. Training courses include Health Connect (Scheduling, Ambulatory Chart view, Registration), and updated training on Kaiser’s Electronic Medical Records System.

**Continuous Improvement** (25%): Training will be offered to all occupations to increase employee team building and problem solving skills. Training delivered will also improve employee communication and ability to organize as well as implement time management skills.

**Computer-Based Training** (10%): Computer-Based Training (CBT) will be used as a delivery method for Medical Skills training to enhance classroom instruction. Staff may receive up to 100 hours in topics such as Pain Management, Cancer Treatment, Documentation Procedures and Introduction to Geriatric Nursing. This training will be offered to all occupations as a training delivery method.

**Medical Skills Training** (35%): All Health Care Analysts, Licensed Vocational Nurses, Patient Care Aides/Assistants, Registered Nurses and Technicians/Technologists will receive Didactic training to remain current in medical treatment such as chemotherapy, podiatry, cardiac monitoring, infection prevention and glucometer training. Training will enhance staff skill set and increase overall proficiency.

The Panel has established a higher reimbursement rate ($22) for nurse upgrade training, recognizing the higher cost of delivery for Medical Skills Training.

Commitment to Training

Kaiser continues to fund new hire orientation, management, and on-the-job training for employees. Kaiser spends approximately $10 million dollars annually in training in the Southern California Region. Training is job specific and companywide.
Kaiser represents that 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

Kaiser staff members have been assigned to administer this Agreement and are responsible for all scheduling, enrollment, tracking of training hours, and meeting with ETP staff over the duration of the contract. Staff selected to perform administrative duties have prior experience with ETP and are familiar with ETP Online procedures and systems.

SET/Priority Wage Modification

Under Special Employment Training, the participating employer is not required to demonstrate out-of-state competition. Trainees must be earning at least the statewide average hourly wage at the end of the retention period. The Panel may modify the minimum wage requirement for companies in priority industries, such as healthcare up to 25% below the state average hourly wage ($20.55). Kaiser is requesting this modification.

Substantial Contribution

Kaiser is a repeat contractor with payment earned in excess of $250,000 within the past five years. (See Prior Project Table.) Accordingly, reimbursement for trainees will be reduced by 15% to reflect the Company’s $112,428 Substantial Contribution to the cost of training.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $ %</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0117</td>
<td>Statewide</td>
<td>08/01/13 to 07/31/15</td>
<td>$600,000</td>
<td>$600,000* (100%)</td>
</tr>
<tr>
<td>ET11-0321</td>
<td>Statewide</td>
<td>06/30/11 to 06/29/13</td>
<td>$299,880</td>
<td>$299,880 (100%)</td>
</tr>
<tr>
<td>ET11-0132</td>
<td>Statewide</td>
<td>02/07/11 to 02/06/13</td>
<td>$249,480</td>
<td>$249,480 (100%)</td>
</tr>
</tbody>
</table>

ET14-0117-Based on ETP Online Tracking Systems, 41,384 reimbursable hours have been tracked for potential earnings of $600,000 (100% of approved amount). As of the date of proposal submission, 514 trainees have been approved and earned $442,772 in funding; 188 trainees have been submitted for final payment and being reviewed/approved by ETP Fiscal for a total of $165,884.

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development of this proposal at no cost.
ADMINISTRATIVE SERVICES
N/A

TRAINING VENDORS
N/A
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

COMMERCIAL SKILLS
- Documentation Standards and Procedures
- Maintaining a Safe Work Environment
- Orientation to Kaiser Permanente Systems and Processes
- Patient Safety Procedures
- Benefits Enrollment
- Business Literacy
- Crucial Conversation
- Four Habits and Service Recovery

COMPUTER SKILLS
- Applications Software for Healthcare
- Electronic Medical Records System Operation and Optimization
- EXCEL Advanced
- EXCEL Intermediate
- Health Connect Ambulatory
- Health Connect Ambulatory Chartview
- Health Connect Check-In Registration
- Health Connect Encounter Documentation for Outreach
- Health Connect HOV Training
- Health Connect Master Scheduling
- Health Connect Scheduling
- Health Connect Scheduling
- Microsoft Access

CONTINUOUS IMPROVEMENT
- Consensus Decision-Making
- Critical Event Team Training
- Labor Management Partnership
- Lmp Performance Academy
- Proactive Office Encounter
- Quality Improvement Programs
- Speaking Up: Fostering An Open And Psychologically Safe Environment
- Unit Based Team – Member
- Budgeting, Staffing And Scheduling
- Case Management/Discharge Planning
- Charge Nurse Training/Frontline Leadership Skills
- Coaching Fundamentals
- Communications Skills
- Conflict Resolution Skills
- Front Office Operations Improvement
- Gathering And Using Data
- Handling Difficult Situations
- Human Resources Management
- Identifying And Resolving Problems
- Organization And Time Management Skills
- Patient And Family Centered Care Skills
- Performance And Quality Improvement And Procedures Skills
- Planning And Designing Work Processes
- Raid Improvement Model
- Reviewing And Evaluating Team Performance
- Root Learning Maps
- Service Excellence
- Team Building Skills

**MEDICAL SKILLS TRAINING - DIDACTIC**
- ACLS
- Fetal Heart Monitoring
- Advanced Stroke Education
- AED Defibrillator Training
- Aerosol Transmissible Diseases Training
- Alaris Pump Review
- Ambulatory Nursing Orientation
- Ambulatory Care Wound Care Management
- Ambulatory Competencies
- Anesthesia Dept. Orientation Checklist
- Annual Competency Validation
- Audiometric Hearing Screening Training
- Basic Life Support Skill Testing
- Blood & Blood Components
- Blood Pressure Competency
- Blood borne Pathogen
- Breast Biopsy Procedure
- Call Center Orientation
- Cardiac Catheterization Lab Nursing Orientation
- Cardiac Monitoring - 2014
- Care And Concern
- Care Experience Training
- Care Of The Patient After Renal Biopsy
- Care Of The Patient With Oncology Diagnosis/History
- Caring For And Protecting Our Elderly Patients And You
- Center Of Excellence For Minimally Invasive Gynecology
- Central Venous Access Device
- Chemotherapy Administration
- Chest Radiology Tumor Board
- Chest Tube Drainage And Monitoring Care
- Cleft Palate & Craniofacial Clinic
- Clinical Review
- CNA Nursing Orientation
- Co-Lead Transition Workshop
- Code Blue Simulation
- Comprehensive Workplace Safety System (Cwpss)
- Covidien Urology Tray Enhancements
- Delirium
- Dermatopathology Clinical Cases
- Diabetes Management
- Diagnostic Imaging RN Orientation Competency And Skill Validation
- Dietary Aide Orientation Competency
- Dietary Aide Orientation Competency Skills Validation
- Documentation Review
- Ear Lavage Policy
- Echo cardiology QA
- Education Day Modules
- EKG
- Emergency Area Orientation
- Emergency Medicine Morbidity And Mortality
- Equipment
- ER Tech Orientation Competency
- Essential Of Successful Communication
- Falls Prevention
- Family Centered Care Course - Post Partum
- Fecal Occult Blood
- Fetal Diagnosis And Management Conference
- Flu Competency
- Food And Nutrition Room Service Review
- General Surgery Morbidity And Mortality Conference
- General Tumor Board
- Globally Harmonized System
- Glucometer Training- Staff Validation
- Head And Neck Surgery Tumor Board Meeting
- Health Care Worker Orientation Day 1
- Identifying Acute Change In Patient Status And Activating Critical Response
- Implanted Ports
- Infection Prevention
- Insulin Initiation & Titration
- Intravenous Medication Administration
- Labor & Delivery Scrub Training
- Laboratory Employee Skills/Competency Assessment Orientation
- Laser Safety Training
- Life Safety And General Orientation For MRI And CT
- Lifting And Body Mechanics
- Lipid Management
- LVN Orientation
- MA/LVN HCWO Training Program
- Medical Panel Workflow
- Medical Terminology Book Completion
- Medication Inhalation- Initial
- Neonatal Resuscitation Program
- Neuroradiology
- New Grad Program
- Nova Glucometer Training Validators Class
- NRP
- Nuclear Med/MRI Tech Competency
- Nurse Advice
- Nursing Assistant Ward Clerk Update
- Nursing Update
- On Call RN Telephone Triage
- Chemotherapy & Biotherapy Provider
- Ophthalmology
- Pain Management
- Patient Safety University
- Pediatric Advanced Life Support Provider Program
- Pediatric Assessment, Care & Management Training
- Perioperative Nursing Symposium
- Phlebotomy Training
- Podiatry Surgery Radiology Rounds
- Point Of Care Test
- Policy And Procedure Review
- Preceptor Program
- Pressure Ulcer
- Principles Of Sterile Technique For Dermatology & Di Pt 2 (Skills)
- Professional Nursing: Caring Training And Bariatric Surgical Care
- Professional Nursing: General Surgery & Gastrointestinal
- Radiation Safety
- Regional Charge Nurse Training Program
- Regional Electrocardiogram Workshop
- Regional Pediatric Critical Care Course
- Regional Preceptor Training
- RN Leadership Development Program
- RN Leadership Program
- RN Preceptor Training
- Safe Lifting
- Safe Patient Handling
- Sepsis Prevention/Management
- Simulation Training
- Specimen Collection-Midstream-Urine 2013
- Splint Application
- Splinting
- Stroke Education
- Tuberculin Skin Test
- Wound Care 2014
CBT Hours
0 – 100

MEDICAL SKILLS TRAINING

- A Healthcare Provider's Guide To Diabetes Care 4
- A Nurse's Sourcebook Of Complementary Therap 4
- Abcs Of Emergency Burn Management 1
- Abdominal Aortic Aneurysm 1
- Abdominal Trauma 1
- Access, Quality And Advocacy In Healthcare 1
- Acetaminophen Toxicity 1
- Activating A Stroke Alert And The Acute Stroke Te 1
- Acute And Chronic Urinary Retention 1
- Acute Leukemia 1
- Acute Pain Management 1
- Acute Renal Failure 1
- Administration Of Moderate Sedation/Analgesia 1
- Adult Immunizations 1
- Adult Obesity In The United States 1
- Adverse Drug Events 1
- Age-Related Macular Degeneration 1
- Allergic Rhinitis 1
- Alzheimer's Dementia 1
- Ambulatory Surgical Patient Care 1
- An Orthopedic Emergency 1
- Anabolic Steroids 1
- Back In Action With Joint Replacements 1
- Back Pain 1
- Bacterial And Fungal Infections 1
- Bacterial Gastroenteritis 1
- Balance And Hearing: At Risk From Drugs 5
- Bariatric Choice Of Procedures And Preoperative 1
- Basal Cell Carcinoma 1
- Beyond Standardized Care For The Homeless An Mentally Ill 1
- Beyond The Basics In Case Management 6
- Bipolar Disorder 1
- Blood Test, Drugs Boost Success Managing Heart Failure 1
- Body Fluid Exposure And Needle-Stick Injury 1
- Bone Health For Children And Adolescents 3
- Brain And Spinal Cancers 1
- Bronchiolitis In Children: An Evidence-Based Appi 1
- Cancer And Chemotherapy 8
- Cancer Risk Reduction 10
- Cancer Treatment 1
- Cardiac Exercise Testing 1
- Cardiac Invasive Procedures 1
- Cardiac Resuscitation In The Ed
- Case Management - Advocacy And Outcomes
- Cataracts
- Central Sleep Apnea
- Cervical Cancer
- Children In Pain
- Children's Health And Wellness
- Cholesterol — The Good, The Bad, And The Bad
  Part 1
- Chronic Fatigue Syndrome
- Chronic Kidney Disease
- Chronic Medical Conditions And Pregnancy
- Chronic Pain
- Classifying Low Back Pain
- Clinical Challenges Of Pediatric Pain Management
- Clinical Pediatric Nutrition
- CNOR: Anesthesia Techniques And Surgical Pharmacology
- CNOR: Decontamination, Disinfection And Sterilization
- CNOR: Immediate Postoperative Care
- Common Hand And Wrist Injuries
- Common Neonatal Procedures
- Common Pediatric Problems In Ambulatory Care
- Deep Venous Thrombosis And Thrombophlebitis
- Delegating To Unlicensed Assistive Personnel
- Dementia In The Elderly
- Dermatitis
- Diet, Exercise And Fitness
- Disparities In Delivering Palliative Care
- Dizziness In Elders
- Document It Right: A Nurse’s Guide To Charting
- Drug Abuse, Withdrawal And Pain Management
- ECG And Rhythm Interpretation: Blocks, Axis And Hypertrophy
- Emergencies And Palliative Care
- Endoscopic Ultrasound Reveals GI Tract Secrets
- Ensuring Evidence-Based Practice In Critical Care
- Epidemiology: Introductory Concepts
- Epidural Hematoma
- Ethics And Processes
- Every Nurse Is A Risk Manager
- Everyday Ethics For Nurses
- Evidence-Based Effective Nursing Leadership
- Exercise And Fall Prevention In Seniors
- Exercise For Health And Fitness
- Fall Prevention Among The Elderly
- Families In The Ed
- Fibromyalgia
- Fighting For Breath With COPD
- Flexible Scopes And Photodynamic Therapy 1
- Folic Acid 1
- Food Allergies 1
- Food Safety And Protection 6
- Gastric And Peptic Ulcer Disease 1
- Gastric Tonometry 1
- Gastroenteritis 1
- Documentation 1
- Genetic Risk Assessment 1
- Genetic Testing 1
- Genitourinary Trauma 1
- Geriatric Cardiac Health 1
- Getting Started In Home Care 5
- Getting Started In Hospice Care 6
- Giardiasis 1
- Glaucoma 1
- Gout And Pseudogout 1
- Guided Imagery 1
- Guillain-Barré Syndrome 1
- Haemophilus Influenzae Infection 1
- Heart Health: Empowering Women 1
- Heart Healthy Lifestyle Counseling 1
- Heat Exhaustion And Heat Stroke 1
- Hemodialysis 1
- Hepatitis B 1
- Hepatitis C 1
- Herpes 1
- Herpes Zoster 1
- Hodgkin’s Lymphoma 1
- Hormone Therapy 1
- Hospice And Palliative Care 1
- Hypertension And Its Treatment 2
- Improving Critical Thinking And Clinical Reasoning 1
- Infection Control 1
- Influenza 1
- Infusion Nursing: Anatomy And Physiology 1
- Infusion Nursing: Blood And Blood Components 1
- Infusion Nursing: Body Fluids And Electrolytes 1
- Insulin Management 3
- Interstitial Cystitis 1
- Interventional Pain Management 1
- Intrapartal Client 1
- Introduction To Geriatric Nursing 1
- Introduction To Neonatal Resuscitation 1
- Iron Deficiency Anemia 1
- Irritable Bowel Syndrome 1
- Kidney Disease, Part 1 1
- Liver Failure 1
- Low-Back Pain 1
• Lumbar (Intervertebral) Disc Disorders 1
• Lung Cancer 1
• Lupus Remains Incurable, But Research Offers Hope 1
• Lyme Disease 1
• Making Teamwork Work In Nursing 1
• Management Of The Patient With Stroke 9
• Managing Arthritis 6
• Mastitis 1
• Maternal And Infant Nutrition 10
• Measuring Quality Outcomes 1
• Mechanical Ventilation And Weaning 1
• Medical Surgical Nursing: Cardiovascular 1
• Medical Surgical Nursing: Endocrine 1
• Medication Reconciliation: Avoiding Dangerous Errors 1
• Meeting The Challenge Of Pediatric Pain Management 3
• Melanoma 1
• Men And Pancreatic Cancer 1
• Mitral Stenosis 1
• Mitral Valve Prolapse 1
• Mobile Radiography 1
• Multiple Sclerosis 1
• Neonatal - Surgical Emergencies 1
• Neonatal Abstinence Syndrome 1
• Neonatal Cardiac Disorders Ii 1
• Neurosurgical Perianesthesia Care 1
• Nicu Cardiac Disorders 1
• Non-Hodgkin’s Lymphoma 1
• Nursing Informatics 1
• Nursing Informatics Professional Practice 1
• Nursing Professional Development 1
• Obesity And Diabetes In School Children 1
• Obesity Management 12
• Oncologic Breast Reconstruction Today 1
• Oncology Nursing: Hematologic Malignancies 1
• Operationalizing Quality Standards 1
• Orthopedic And Podiatric Perianesthesia Care 1
• Orthopedic Arthritis And Connective Tissue Disorders 1
• Orthopedic Complications Part I 1
• Orthopedic Hip, Femur, And Pelvis 1
• Orthopedic Infections 1
• Orthopedic Knee 1
• Orthopedic Pain 1
• Orthopedic Perioperative Patient Care 1
• Ovarian Cancer 1
• Ovarian Cyst 1
• Pain Assessment 1
• Pancreatic Cancer 1
• Parkinson’s Disease 1
• Patient And Family Perianesthesia Care 1
- Patient Pain Education 1
- Pediatric Advanced Cardiopulmonary Life Support 4
- Pediatric Airway Management 1
- Pediatrics: Fever 1
- Pediatrics: Gastroenteritis 1
- Pediatrics: Respiratory Distress Syndrome 1
- Pelvic Inflammatory Disease 1
- Pericarditis 1
- Periodontal Disease Is A Systemwide Risk 1
- Perioperative Management And Stomal Complications 1
- Perioperative Nursing Environmental Support 1
- Perioperative Patient Safety 1
- Peritoneal Dialysis 1
- Peritoneal Dialysis Advanced 1
- Pharmacology - Cardiac I 1
- Physical And Psychosocial Assessment 1
- Precepting 1
- Pregnancy: Delivery 1
- Pregnancy: Trauma 1
- Premature Ventricular Contraction 1
- Pressure Ulcers 1
- Preventing Falls In The Elderly 1
- Preventing Medication Errors 2
- Progression Of Neoplastic Diseases 1
- Promoting A Culture Of Safety To Prevent Medical Errors 1
- Prostate Cancer 1
- Quality Management And Preventing Infections 1
- Radiation Incidents And Emergency Preparedness 1
- Radiology Cardiac Catheterization 1
- Refresher In The Pharmacology Of Asthma 1
- Renal And Gu Perianesthesia Care 1
- Renal Transplantation 1
- Respiratory Disorders Part I 1
- Responsible Opioid Prescribing 2
- Restraints 1
- Retinal Detachment 1
- Rh Incompatibility 1
- Rib Fracture 1
- Right Versus Left Ventricular Infarctions 2
- Roles Of A Case Manager 1
- Schizophrenia And Psychosis 1
- Scleroderma 1
- Seizure Disorders 1
- Sepsis 1
- Sexually Transmitted Diseases 1
- Shoulder Dislocation 1
- Sick Sinus Syndrome
- Spinal Cord Injuries
- Sports-Related Concussions
- Standards Of Care In Perianesthesia
- Stomal Management
- Surgical Adhesions
- Teaching Tomorrow’s Nurses
- Telephone Triage
- Tension And Traumatic Pneumothorax
- Tourette Syndrome
- Toxic Alert
- Trachea Foreign Bodies
- Transitions Of Care
- Transplant - Ethics And Professional Issues
- Trauma In The Elderly
- Trauma To The Abdomen
- Traumatic Brain Injury
- Understanding & Preventing Foodborne Illness
- Understanding Inactivity Physiology
- Understanding Insulin Management
- Understanding Stress And Immunity
- Vascular Ulcers
- Vasculitis
- Vasoactive Drugs In The Or: Ensuring Patients’ Safety
- Ventricular Aneurysm
- Ventricular Septal Defect
- Viral Infections Part I
- Weight Control & Eating Disorders
- Weight-Loss Medications
- Wound Infections
- Wound Management With Topical Treatments

**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.
August 4, 2015

State of California Employment Training Panel
1100 J Street, 4th Floor
Sacramento, CA 95814

To Whom It May Concern:

We support the application of Kaiser Permanente to the Employment Training Panel to support training for our members.

Sincerely,

Chokri BenSaid
SEIU-UHW
Kaiser Division Director
August 11, 2015

State of California Employment Training Panel
1100 J. Street, 4th Floor
Sacramento, CA 95814

Gentle Persons:

UFCW Union Local 324 supports the application of Kaiser Permanente to the Employment Training Panel to help support training for our members.

If you have any questions, or if I may be of assistance to you, please do not hesitate to contact me.

Sincerely,

UFCW UNION LOCAL 324

Debbie Watts
Union Representative, for
Greg M. Conger, President
# RETRAINEE - JOB CREATION

Training Proposal for:

Vitas Healthcare Corporation of California

Agreement Number: ET16-0176

Panel Meeting of: September 25, 2015

ETP Regional Office: North Hollywood  
Analyst: J. Romero

## PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
</tr>
</thead>
</table>
| SET  
Medical Skills Training 
Priority Rate  
Job Creation Initiative | Healthcare |
| Counts Served: | Priority Industry: | Repeat Contractor: |
| Los Angeles, Orange, San Diego, Sacramento, Alameda, San Francisco | Yes | Yes |

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>Number of Employees in:</th>
</tr>
</thead>
</table>
| | CA: 1,877  
U.S.: 8,376  
Worldwide: 8,376 |
| | Turnover Rate: | Managers/Supervisors: |
| | 6% | N/A |

## FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$748,952</td>
<td>$0</td>
<td>$0</td>
<td>$748,952</td>
</tr>
</tbody>
</table>

| In-Kind Contribution: | 100% of Total ETP Funding Required | $1,335,096 |

ETP 130 - Single (10/02/14)  
1 of 5
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine Prio Rate Medical Skills Training</td>
<td>MS Didactic; MS Clinical with Preceptor; Continuous Impr</td>
<td>881</td>
<td>8 - 200</td>
<td>0</td>
<td>$673</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraine Prio Rate Job Creation Initiative Medical</td>
<td>MS Didactic; MS Clinical with Preceptor; Continuous Impr</td>
<td>20</td>
<td>8 - 200</td>
<td>0</td>
<td>$2,560</td>
</tr>
<tr>
<td></td>
<td>Skills Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Minimum Wage by County: Job Number 1: $20.55 per hour Statewide Average Hourly Wage
Job Number 2 (Job Creation): $13.31 per hour for Los Angeles County; $13.70 per hour for San Francisco and Alameda Counties; $13.13 per hour for Sacramento County; $13.28 per hour for San Diego County and $13.36 per hour for Orange County.

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

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $2.85 per hour for Job Number 1 and up to $1.31 per hour for Job Number 2 may be used to meet the Post-Retention Wage.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Number 1:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registered Nurse</td>
<td>352</td>
<td></td>
</tr>
<tr>
<td>Licensed Vocational Nurse (LVN)</td>
<td>309</td>
<td></td>
</tr>
<tr>
<td>Social Worker</td>
<td>62</td>
<td></td>
</tr>
<tr>
<td>Chaplain</td>
<td>62</td>
<td></td>
</tr>
<tr>
<td>Job Number 2:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registered Nurse (RN)</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Licensed Vocational Nurse (LVN)</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Social Worker</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Chaplain</td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1978 and located in Encino, Vitas Healthcare Corporation of California (Vitas) (www.vitas.com), is a provider of hospice services to both adult and pediatric patients. Typically, these are patients with a wide range of life-limiting illnesses that includes: cancer, stroke, heart, lung, liver and kidney diseases, Multiple Sclerosis, Amyotrophic Lateral Sclerosis, Alzheimer’s and Acquired Immune Deficiency Syndrome. Vitas works closely with patients, families, and attending physicians and partners with hospitals, nursing homes and community-based organizations.

The Company, a wholly owned subsidiary of Chemed, strives to provide quality human services, products, and case management. Training will take place at seven locations: Covina, Irvine, Encino, San Diego, San Francisco, Sacramento, and Oakland.

Vitas cares for the terminally-ill on two levels of service: hospice care and palliative care. Hospice Care is a collaborative approach in providing comfort to patients and their families as well as preserving dignity while offering options and choices that go far beyond accepted medical standards. Palliative Care is a complement to the patient’s medical treatment, by way of managing pain and alleviating symptoms to improve quality of life and providing emotional and spiritual support in dealing with difficult medical issues.

PROJECT DETAILS

Vitas recently went through a massive overhaul of their proprietary bedside documentation system, Care Plan It (CPI). Due to the changes and advancing technological developments in Medicare Hospice Benefit (MHB), Vitas decided to discontinue usage of the CPI system for a paper system while developing a new bedside Electronic Medical Record that will gradually replace the paper system based on regulatory changes in the MHB. This change requires the Company to re-educate its patient care staff on manual documentation and new bedside EMR.

Additionally, hospice regulations require unique documentation. This requires initial and ongoing education in treating each patient and family individually, while taking into account standards of care for individual symptoms. Vitas needs to continue to educate its team in their response to individual patients’ physical, psychosocial, spiritual, environmental and medical issues in order to develop a plan-of-care implemented by the hospice team, patient and caregivers.

Otherwise, training is based on a needs assessment performed at each location, and with the concept of interdisciplinary assessments and the individualized plans of care.

Training Plan

This proposed training plan targets Medical Skills (Didactic and Clinical Preceptor), and Continuous Improvement training. The Company has in-house trainers ready to provide training in their areas of expertise.

Vitas has completed two previous ETP Agreements. Following the conclusion of the last ETP Agreement, Vitas instituted initiatives in response to the trends and changes which require supplemental training. These initiatives include Creating Efficiencies, Patient Best Practices, 24-Hour Continued Care (Telecare), and Mentoring and Accountability. These initiatives include training to prepare staff for the voluntary Hospice Certification. Some of the curriculum in this proposal may be similar to previous ETP Agreement. However, the material or content is ever changing due to changes in regulations, new interpretation of regulations, process changes, and system changes. Trainees will not receive duplicate training.
Continuous Improvement (20%): This training will be offered to all trainees. This training will allow employees to expand their knowledge in different areas of expertise; develop better skills in dealing with and understanding patient needs; work effectively in teams; and communicate well with patients and their families to be successful in the hospice industry.

Medical Skills Training

The Panel has established a “blended” reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model. For this project, approximately 362 Registered Nurses and 313 Licensed Vocational Nurses will participate in clinical skills training classes. Recognizing a higher cost of delivery for clinical skills training, the $22 per hour rate will apply to both Didactic and Preceptor modes of delivery.

Medical Skills Training – Clinical Preceptor (40%): This training will be offered to Registered Nurses and Licensed Vocational Nurses. Trainees will observe hands-on skills under a formalized mentoring program, Illuminating VITAS, that pairs an experienced team member with other nurses. This training covers Competency Training, Medication Delivery, Plan of Care Development, Plan of Care Implementation and Clinical Assessment. The training will also prepare the staff for Hospice Certification.

Medical Skills Training – Didactic (40%): This training will be offered to Registered Nurses and Licensed Vocational Nurses. The training will primarily focus on preparing higher level staff for hospice certification, which will be a major initiative for VITAS over the next two years. It will prepare nurse staff for the CHPN exam, which requires the ability to assess, plan, intervene and evaluate situations that arise during the patient care process while maintaining optimal functioning and improving quality of life for patients.

Retrainee - Job Creation

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

Vitas has committed to hiring 20 new employees (Job Number 2). Vitas represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract. As a feature of this program, the Substantial Contribution requirement will be waived for Job Number 2.

Vitas plans to expand business capacity, hiring 20 new employees to prepare for an anticipated 10%-15% patient increase over the next few years. Vitas is constantly looking for expansion opportunities across the State based on county demographics, underserviced population reports, and the needs of its partners.

Special Employment Training/Wage Modification

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees in non-priority industries must be earning at least the statewide average hourly wage of $27.40. Trainees employed in a priority industry qualify for a SET wage modification up to 25% below the statewide average hourly wage to $20.55 per hour.
Substantial Contribution

Vitas Healthcare Corporation of California September 25, 2015 ET16-0176

Substantial Contribution

Vitas is a repeat contractor with payment earned in excess of $250,000 for all California facilities within the past five years. However, no single facility has earnings in excess of $250,000; therefore, the substantial contribution requirement does not apply.

Commitment to Training

Vitas represents that 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

Vitas has qualified trainers to provide training and a training plan in place. Since this is Vitas third agreement, the Company has developed internal administrative procedures to capture training using rosters completed according to ETP guidelines which helps maximize earnings and performance.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
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<tbody>
<tr>
<td>ET12-0335</td>
<td>Encino</td>
<td>04/02/2012-04/01/2014</td>
<td>$418,824</td>
<td>$418,824 (100%)</td>
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<tr>
<td>ET10-0136</td>
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<td>10/05/2009-10/04/2011</td>
<td>$249,696</td>
<td>$226,353 (91%)</td>
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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:

MEDICAL SKILLS – CLINICAL PRECEPTOR
- (Subacute, Skilled Nursing, Transitional Care & Hospice)
  - Patient Assessment & Care
  - Geriatric Nursing Skills
  - Med/Surg Nursing Skills
  - Pre and Post Operative Care
  - Orthopedic Nursing Skills
  - Oncology Nursing Skills
  - Hospice Nursing Skills

MEDICAL SKILLS TRAINING – DIDACTIC
- Behavioral Health Nursing Skills
- Body Mechanics
- Care of Bariatric Patient
- Care of the Cardiac Patient
- Care of the Stroke Patient
- Care Planning and Documentation
- Central Lines Management
- Chest Tube Care & Management
- Diabetes Care & Management
- Educating the Patient & Family
- Equipment Skills (IV pumps, cardiac telemetry, vital signs, pulse-oximeter, ventilators, specialty beds and mattresses, etc.)
- Evidence Based Practices
- Gastrointestinal Assessment and Management
- Infection Control
- Medical/Surgical Nursing Skills
- Medication Administration & Management
- Moderate Sedation
- New Graduate Nursing Skills
- Nurse Orientation Training (for New Grads only)
- Nursing Diagnosis Skills
- Nursing Process Skills
- Oncology Nursing Skills
- Orthopedic Nursing Skills
- Ostomy & Continence Care
- Pain Management (Acute & Chronic)
- Patient Assessment & Care
- Patient Fall Prevention
- Psychiatric Nursing Skills
- Psychotropic Medications
- Renal Assessment & Management
- Respiratory Assessment & Care
- Restraints
- Total Parenteral Nutrition (TPN)
- Transfer Techniques
- Triage Nursing Skills
- Ventilator and Tracheotomy Care
- Wound & Skin Care
CONTINUOUS IMPROVEMENT

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

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

Training Proposal for:

GKN Aerospace Chem-tronics Inc.
dba ASTECH Engineered Products

Agreement Number: ET16-0184

Panel Meeting of: September 25, 2015

ETP Regional Office: San Diego

Analyst: M. Ray

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Priority Rate Retraine Job Creation Initiative</th>
<th>Industry Sector(s):</th>
<th>Manufacturing Aerospace and Defense Engineering</th>
<th>Priority Industry: ☒ Yes ☐ No</th>
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<tbody>
<tr>
<td>Counties Served:</td>
<td>Orange</td>
<td>Repeat Contractor:</td>
<td>☒ Yes ☐ No</td>
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</tr>
<tr>
<td>Union(s):</td>
<td>☐ Yes ☒ No</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Number of Employees in:</td>
<td>CA: 1,398</td>
<td>U.S.:4,907</td>
<td>Worldwide: 12,345</td>
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</tr>
<tr>
<td>Turnover Rate:</td>
<td>14%</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>5%</td>
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FUNDING DETAIL

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<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
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<tbody>
<tr>
<td>$518,640</td>
<td>$0</td>
<td>$0</td>
<td>$518,640</td>
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</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $1,424,000
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine No.</td>
<td>Computer Skills, Continuous Impr., Mfg Skills, PL-Mfg Skills</td>
<td>256</td>
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<td>0</td>
<td>$1,440</td>
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<tr>
<td></td>
<td>Priority Rate</td>
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<td></td>
<td></td>
<td>Weighted Avg: 80</td>
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<tr>
<td>2</td>
<td>Retraine No.</td>
<td>Computer Skills, Continuous Impr., Mfg Skills, PL-Mfg Skills</td>
<td>75</td>
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<td>$2,000</td>
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<tr>
<td></td>
<td>Priority Rate</td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 100</td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** Job Number 1: $16.02 per hour for Orange County; and Job Number 2: $13.35 per hour for Orange County.

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

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

Job Number 1 only: Up to $2.02 per hour may be used to meet the Post-Retention Wage.

## Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Support</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Engineer</td>
<td>87</td>
<td></td>
</tr>
<tr>
<td>Technician</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>Mechanic</td>
<td>39</td>
<td></td>
</tr>
<tr>
<td>Welder</td>
<td>27</td>
<td></td>
</tr>
<tr>
<td>Inspector</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>Operator</td>
<td>66</td>
<td></td>
</tr>
<tr>
<td>Machinist</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Supply Chain</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Maintenance</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Program Manager</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>16</td>
<td></td>
</tr>
</tbody>
</table>

## INTRODUCTION

Headquartered in Irving, TX, GKN Aerospace Chem-tronics Inc. dba ASTECH Engineered Products (GKN Aerospace) (www.gkn.com), a division of GKN PLC, was established in 1993. Since its inception, GKN Aerospace has strategically acquired other leading aerospace manufacturers to create world-class aerospace business (Chem-tronics was acquired in 1999). GKN Aerospace is a global first-tier supplier of airframe and engine structures, components,
assemblies, and transparencies to a wide range of aircraft and engine prime contractors and other first-tier suppliers. It operates in three main product areas: aero structures; engine structures and systems; as well as special products such as ice protection, fuel systems, and flotation devices.

This will be GKN Aerospace’s fourth ETP Agreement, the first in the last five years. GKN Aerospace has a total of five California facilities: Garden Grove, El Cajon, Burbank, Camarillo, and Santa Ana. This project is targeted to train approximately 331 workers in the Santa Ana location only. The 335,000 sq. ft. Santa Ana facility manufactures precision fabricated honeycomb structures and assemblies using proprietary technology and processes. The honeycomb consists of flanged ribbons that are resistance spot welded to face sheets, creating a unique, high-strength panel material with superior performance characteristics. The Company’s broad customer base includes Pratt & Whitney, UTAS, Rolls Royce, Boeing Spirit, Boeing 767, and Boeing 737 MAX.

PROJECT DETAILS

GKN Aerospace’s training needs are heavily driven by the significant increase in customer demands. In December 2013, the Company was awarded Boeing’s new 737 MAX program. The 737 MAX is Boeing’s newest single-aisle aircraft. It was designed to build on the Next-Generation 737’s popularity and reliability while delivering unsurpassed fuel efficiency in the single-aisle aircraft market. The projected ramp-up time for this project is estimated to extend to June 2017.

With the awarded Boeing work, the Santa Ana facility is positioned for the development and long-term production. The Company will be tasked to produce titanium inner wall (TIW) structures, which will be used in the new General Electric Leading Edge Aviation Propulsion (LEAP) engine on the new Boeing 737 MAX aircraft. The TIW design requires the use of an advanced material, Beta 21S titanium alloy chosen for its ability to withstand high temperatures and corrosive environments during operation in the aircraft engine. Combined with the Company’s proprietary honeycomb structural design, the TIW will allow the engine to run at much higher temperatures than its predecessor. Preparation for the TIW project has required custom tools and processes to produce the detailed parts needed for final assembly.

Retrainee - Job Creation

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

The Company has committed to hiring 75 employees (Job Number 2). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

To support growth, GKN Aerospace has committed to implementing three additional shifts. The Company has developed strategic objectives to increase the number of skilled workers as well as infrastructure and technological advancements. To further support the exponential growth caused by the acquisition, GKN Aerospace has invested $70M on the following new equipment to be installed at the facility between 2013 and 2017:

- Panel Fabrication Machines
- Metal Presses and Shearing Machines
- Chemical Processing Lines
- Vacuum Furnaces
- Robotic Equipment
- Electrical Discharge Machining (EDM)
- Automated Assembly Lines
- Drying Ovens

Training Plan

The Company has deployed and implemented a curriculum utilizing an Analysis, Design, Develop, Implement, and Evaluate (ADDIE) model. The ADDIE model is the generic process traditionally used by instructional designers or training developers to represent a dynamic, flexible guideline for building effective training and performance support tools. As a result, the curriculum will augment and strengthen existing training courses to empower employees with knowledge and skills necessary to meet specific requirements and increased customer demands.

Computer Skills (10%) – Training will be offered to all trainees as it pertains to their job duties. Course topics in CNC, Robotics, ERP, and TIPQA Application Skills training will provide trainees with the ability to streamline processes and improve customer responsiveness across all departments.

Continuous Improvement (10%) – Training will be offered to all job occupations. Trainees will receive course topics in Six Sigma, Lean Manufacturing, Statistical Process Control, and Project Management to support increased customer demands while complying with quality standard requirements.

Manufacturing Skills (50%) – Training will be offered to Technicians, Mechanics, Welders, Inspectors, Operators, Machinists, Supply Chain, Maintenance, and Managers to develop their skills in all areas of production, processes, and procedures. Majority of the training will focus on the new machines. Training will allow trainees to operate equipment and processes more efficiently and improve product quality.

Productive Laboratory – Manufacturing Skills (30%)

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.

In this proposal, GKN Aerospace requests PL training in Manufacturing Skills topics in Robotics, Mechanics, Electrical, Electronics, Welding, Manufacturing, Metal Fabrication, and Machine Processes and Techniques, as well as CNC, Equipment Maintenance, and Operation of Automated Machinery. The Company determined that PL training presents the most effective way to train manufacturing skills to be able to leverage maximum results from SMEs to trainees in the form of structured hands-on-training. Training will be delivered to approximately 125 existing and newly-hired Technicians, Mechanics, Welders, Inspectors, Operators, Machinists, and Maintenance Staff. Trainees may receive all their training hours in PL-Manufacturing Skills or a combination of class/lab including PL hours. Training will be specific to the type of equipment and/or process to ensure trainees receive a broader understanding of the entire manufacturing process.
The Company anticipates a 25% to 50% decrease in production on particular machinery or process during PL as trainees and machinery will not be expected to produce the same output level. During the decreased production time trainees will be able to focus on product quality and acquire the skills to become competent in the operation of the equipment.

A tasks and competencies evaluation has been provided which reflects most of the PL course topics take up to 100 hours to complete, specifically for Operators, Welders, and Inspectors who are significantly impacted by the Company's implementation of new equipment and manufacturing processes. As such, GKN Aerospace is requesting up to the 60-hour PL cap in Manufacturing Skills training for the aforementioned trainees.

The PL training will be delivered by qualified Subject Matter Experts (SMEs) and/or machine-certified trainers. Trainers will be responsible for directing the operations and instructions as well as providing immediate feedback to the trainee as work is performed. Trainers will document all training daily.

The trainer-to-trainee ratio will vary between 1:1 and 1:3. The 1:3 ratio is the ideal number of trainees to cycle through the PL program during training periods when SMEs and/or certified trainers and training equipment (decreased production equipment) is limited. The higher 1:3 ratio for machinery training will allow the Company to only take the equipment down once for four hours rather than three times with a total of 12 hours downtime. In addition, trainees must work in teams to allow for effective knowledge and skills transfer across three shifts in a single four-hour course of instruction. Consequently, this also requires a higher trainer-to-trainee ratio (1:3) during certain PL training sessions. As such, staff will benefit from being trained at the same time in one training session rather than two or three repetitive sessions.

Temporary to Permanent Hiring

Some trainees in Job Number 2 come under Panel guidelines for “temporary to permanent” employment. GKN Aerospace has retained these employees through a temporary agency, with the intention of hiring them into full-time, permanent positions after training.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by GKN Aerospace. Until then, GKN Aerospace will not receive progress payments.

Commitment to Training

GKN Aerospace represents that 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 the past, Company-funded training included a full range of mandatory job-specific and company-wide topics delivered via Classroom, Laboratory, on-the-job, or Computer-Based Training (self-paced).

Training Infrastructure

The Company recently hired a Training Manager and Training Coordinator to oversee, manage, schedule, monitor, and track training. Curriculum development will encompass all new and existing objectives. Training success will be measured through peer-review and quantifiable tests/exams to assess understanding, track progress, and reduce nonconformance reports (NCRs).
Impact/Outcome

A comprehensive training certification program is currently being developed to equip GKN Aerospace workers with the skills needed to achieve facility and company-wide business goals. Some trainees may receive Six Sigma (Green Belt and Black Belt) certification, Kaizen certification, and other in-house certifications for core training. These certifications will create a dynamic workforce, allowing the Company to exceed customer expectations through solid employee job performance.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200

Trainees may receive any of the following:

**COMPUTER SKILLS**
- Computer Numerical Control Application
- Robotics Application
- Enterprise Resource Planning
- TIPQA Software Application
- Programmable Logic Controller Application
- Microsoft Office (Intermediate and Advanced)

**CONTINUOUS IMPROVEMENT**
- Six Sigma
- Statistical Process Control
- Design of Experiments
- LEAN Manufacturing Techniques
- Project Management
- Time Management
- Presentation Skills
- Communication Skills
- Leadership Skills

**MANUFACTURING SKILLS**
- Robotics Processes and Techniques
- Mechanics Processes and Techniques
- Electrical Processes and Techniques
- Electronics Processes and Techniques
- Welding Processes and Techniques
- Manufacturing Processes and Techniques
- Quality Systems Procedures
- Computer Numerical Control (CNC) Processes and Programming Techniques
- Machine Programming Processes and Techniques
- Equipment Maintenance and Troubleshoot
- Operation and Control of Automated Machinery
- Troubleshooting and Fault Isolation of Automated Machinery
- Machine Tooling
- Metal Fabrication Techniques
- Non-Destructive Testing

Productive Lab Hours

0–60

**MANUFACTURING SKILLS (1:3 ratio)**
- Robotics Processes and Techniques
- Mechanics Processes and Techniques
- Electrical Processes and Techniques
- Electronics Processes and Techniques
- Welding Processes and Techniques
- Manufacturing Processes and Techniques
- Computer Numerical Control (CNC) Processes and Programming Techniques
- Machine Programming Processes and Techniques
- Equipment Maintenance and Troubleshoot
- Operation and Control of Automated Machinery
- Metal Fabrication Techniques

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 60 hours per-trainee.
## RETRAINEE - JOB CREATION

Training Proposal for:

ViaSat, Inc.

Agreement Number: ET16-0183

Panel Meeting of: September 25, 2015

ETP Regional Office: San Diego

Analyst: J. Davey

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraine</th>
<th>Priority Rate</th>
<th>Job Creation Initiative</th>
<th>Industry Sector(s):</th>
<th>Manufacturing</th>
<th>Technology/Other</th>
<th>Communication</th>
<th>Aerospace and Defense</th>
<th>Priority Industry:</th>
<th>Yes</th>
<th>No</th>
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</thead>
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<tr>
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<table>
<thead>
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<table>
<thead>
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<td></td>
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<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 1,691</th>
<th>U.S.: 3,263</th>
<th>Worldwide: 3,361</th>
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<tbody>
<tr>
<td></td>
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<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>7%</th>
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<table>
<thead>
<tr>
<th>Managers/Supervisors: (%) of total trainees:</th>
<th>16%</th>
</tr>
</thead>
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<tr>
<td></td>
<td></td>
</tr>
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### FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>= Total ETP Funding</th>
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<td>$422,400</td>
<td>$0</td>
<td>$0</td>
<td>$422,400</td>
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<table>
<thead>
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<th>$1,211,440</th>
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</table>
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Class / Lab</td>
<td>CBT</td>
</tr>
<tr>
<td>1</td>
<td>Retrainee</td>
<td>Business Skills,</td>
<td>700</td>
<td>8-200</td>
<td>0-68</td>
<td>$432</td>
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<tr>
<td></td>
<td>Priority Rate</td>
<td>Computer Skills,</td>
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<td>Weighted Avg: 24</td>
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<tr>
<td></td>
<td></td>
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<td></td>
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<td></td>
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<td>2</td>
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<td>Job Creation</td>
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<td></td>
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<td>Weighted Avg: 24</td>
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</tr>
<tr>
<td></td>
<td>Initiative</td>
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<td></td>
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<td></td>
<td>Priority Rate</td>
<td>Mgmt Skills</td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**Minimum Wage by County**: Job Number 1: $15.93 per hour for San Diego County (standard wage); Job Number 2: $13.28 per hour for San Diego County (Job Creation).

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

**Used to meet the Post-Retention Wage?**:  □ Yes  □ No  □ Maybe
Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
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<tbody>
<tr>
<td></td>
<td>Job Number 1</td>
<td>Job Number 2 (Job Creation)</td>
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<td>Administrative Professionals</td>
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<td>22</td>
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<tr>
<td>Administrative Professionals II</td>
<td>65</td>
<td>16</td>
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<tr>
<td>Administrative Support</td>
<td>52</td>
<td>25</td>
</tr>
<tr>
<td>Engineers I</td>
<td>177</td>
<td>38</td>
</tr>
<tr>
<td>Engineers II</td>
<td>110</td>
<td>37</td>
</tr>
<tr>
<td>Engineers III</td>
<td>27</td>
<td>17</td>
</tr>
<tr>
<td>IT/Technical Professionals I</td>
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<td>6</td>
</tr>
<tr>
<td>IT/Technical Professionals II</td>
<td>11</td>
<td>5</td>
</tr>
<tr>
<td>Manager/Supervisors I</td>
<td>28</td>
<td>15</td>
</tr>
<tr>
<td>Manager/Supervisors II</td>
<td>33</td>
<td>12</td>
</tr>
<tr>
<td>Project/Program Managers I</td>
<td>17</td>
<td>7</td>
</tr>
<tr>
<td>Project/Program Managers II</td>
<td>28</td>
<td>15</td>
</tr>
<tr>
<td>Technicians/Inspectors</td>
<td>75</td>
<td>35</td>
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</table>
INTRODUCTION

ViaSat, Inc. (ViaSat) designs, engineers, and produces a line of commercial and government satellite networking communications systems. The products, called Very Small Aperture Terminals or VSAT, provide communication links between ground-based and satellite communication devices. ViaSat also recently launched its first telecommunications satellite to provide telephone, Internet, television and other telecommunications services to rural and hard-to-serve U.S. locations.

PROJECT DETAILS

The successful launch of the ViaSat-1 communications satellite in 2011 has paved the way for the Company to launch ViaSat-2 in 2016. This new satellite is expected to cover seven times the geographic area and offer twice the bandwidth of ViaSat-1, providing commercial communications coverage throughout North America and connecting North America with high-capacity coverage in the UK and Europe. The success of ViaSat-1 also included the Company’s partnership with JetBlue Airways for in-flight communications. The success has allowed ViaSat to contract with Virgin America Airlines. The airline will use ViaSat’s services for in-flight WiFi connectivity.

ViaSat's government customer base (U.S. Department of Defense) has also been expanding. The Company has entered several “open” contracts to supply the U.S. next-generation equipment: Blue Force Tracking System (BFT-2); Global Tactical Advanced Communications Systems; and MIDS Cryptographic Module.

Retrainees - Job Creation

In support of job creation, the Panel is offering incentives to companies that commit to hiring new employees. Under the Retrainees-Job Creation program in Fiscal Year 2011/12, training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

As outlined above, ViaSat is expanding its business opportunities into the commercial telecommunications market and increase its government contracting services.

ViaSat has grown immensely over the past two years. Its facilities in Carlsbad is expanding from 9 buildings to an expected 13 buildings by 2017. Over the last three years, the Company has hired between 200 and 300 trainees per year and expects to continue hiring new staff at that pace into 2017. With this new growth, the Company has committed to hiring 250 new employees over the term of the Agreement (Job Number 2). Trainees will be hired within the three months prior to approval or within the term of the Agreement.

Training Plan

This is the Company's fourth ETP training proposal, the second in the last 5 years. This time, ViaSat plans to deliver fundamental skills from the previous Agreement such as: program management, risk management, and introductory satellite communications. This will be for newly-hired employees and/or staff who have not received this training before. Training will not be duplicated and will ensure greater cross-functional knowledge sharing and understanding.

The Company will also focus on new skills to ensure employees are getting the tools and resources they need to stay up-to-date on the latest technological advances. The Company will leverage training in the previous project to ensure that trainees continue in their development.
**Business Skills** (40%): This training will be offered to all trainees to improve performance in all areas of the business. Trainees will receive job-specific training in purchasing, program/project management, communication skills, earned value, and other customer-focused skills. Training is expected to improve performance.

**Computer Skills** (5%): This training will be offered to Engineering, Corporate Support, and Operations Support Staff to ensure optimal efficiency in sophisticated software applications such as Oracle, Advanced Information Technology, and Intermediate and Advanced levels of Microsoft’s Office suite.

**Continuous Improvement** (35%): This training will be offered to all trainees to provide the necessary skills to develop more standardized processes and products and meet customer quality demands.

**Management Skills** (20%): This training will be offered to Frontline Management/Supervisory Staff to provide the necessary skills to develop current and future leaders. Most of the current management staff comes from a technical background and will need the requisite skills to lead, make decisions, and coach employees to higher efficiency levels.

**Computer-Based Training**

ViaSat will also provide up to 68 hours of ancillary Computer-Based Training (CBT) in Business and Computer Skills to reinforce some of the class/lab training. CBT is capped at no more than 50 percent of a trainees total training hours.

**Commitment to Training**

ViaSat represents that ETP funds will not displace the existing financial commitment to training. ViaSat represents that safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. ViaSat has provided new employee; Computer, Business, and Management Skills; and some Continuous Improvement in the past. The Company does not have an identified training budget. Each business unit allocates its own funds for training as necessary. The Company is committed to training beyond this proposal. As a highly technical business, training is an integral part of its ability to remain competitive.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>Payment Earned %</th>
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<tbody>
<tr>
<td>ET12-0276</td>
<td>Carlsbad</td>
<td>02/06/2012–02/05/2014</td>
<td>$196,500</td>
<td>$185,751</td>
<td>(95%)</td>
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</table>
DEVELOPMENT SERVICES
N/A

ADMINISTRATIVE SERVICES
N/A

TRAINING VENDORS
To Be Determined
Menu Curriculum, Exhibit B

Class/Lab Hours
8-200

Trainees may receive any of the following:

BUSINESS SKILLS
- Negotiating Skills
- Program/Project Management
- Communication Skills
- Earned Value
- Purchasing Practices
- Shipping and Receiving Processes
- Equipment Operation
- Customer Service
- Business Presentation Skills
- Time Management

COMPUTER SKILLS
- MS Office – Intermediate/Advanced only
- Oracle
- Taleo
- Technical Seminar/Engineering Best Practices
- Advanced Information Technology

CONTINUOUS IMPROVEMENT
- Continuous Maturity Model (CMM) (Process Improvement)
  - Overview
  - Process Management
  - Requirements Management
  - Peer Review
  - Risk Management
  - Communications
  - Estimation
  - Support
- Engineering Tools
- Departmental Process Training
- Agile
- Team Building
- Team Dynamics
- Six Sigma (Quality Fundamentals)
- Lean Manufacturing
- Supplier Collaboration
- Supply Chain Management
- Change Management

MANAGEMENT SKILLS (Managers/Supervisors only)
- Leadership
- Decision Making
- Coaching
- Management Principles
- Feedback
CBT Hours
0 – 68

BUSINESS SKILLS
- Project Planning/Management (8 hours)
- Advanced Information Technology (16 hours)
- Interpersonal Communications (4 hours)

COMPUTER SKILLS
- MS Office – Intermediate/Advanced (8 hours)
- Oracle (16 hours)
- Taleo (16 hours)

Note: Reimbursement for retraining is capped at 200 total hours per-trainee, regardless of method of delivery. CBT is capped at 50% of total training hours, per-trainee.
AB118
Training Proposal for:
Tesla Motors, Inc.
Agreement Number: ET16-0803

Panel Meeting of: September 25, 2015
ETP Regional Office: San Francisco Bay Area Analyst: A. Nastari

PROJECT PROFILE

<table>
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<tr>
<th>Contract Attributes</th>
<th>Industry Sector(s)</th>
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<td>AB118 (Alt Funds)</td>
<td>Manufacturing</td>
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<td>Retraine</td>
<td>Green Technology</td>
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<td>Priority Rate</td>
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<tr>
<td>Job Creation Initiative</td>
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</tr>
<tr>
<td>HUA</td>
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<tr>
<td>Priority Industry:</td>
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<td>No</td>
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<th>Counties Served</th>
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<tr>
<td>Alameda, Los Angeles, San Joaquin, Santa Clara</td>
<td>Yes No</td>
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| Union(s): | | |
|-----------|-----------|
| Yes No    | |

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA: 10,300 U.S.:11,500 Worldwide: 14,000</td>
</tr>
</tbody>
</table>

| Turnover Rate: |
| 13% |

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

FUNDING DETAIL

All funding will be under the Alternative and Renewable Fuel and Vehicle Technology Program created under AB118.

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
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<td>$468,000</td>
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In-Kind Contribution: 100% of Total ETP Funding Required | $833,340
### TRAINING PLAN TABLE

<table>
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<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority Rate Job Creation</td>
<td>Advanced Tech, Continuous Impr, HazMat, Manufacturing Skills, PL-Mfg Skills</td>
<td>975</td>
<td>8-200 0-12</td>
<td>$480</td>
<td>$15.07</td>
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**Minimum Wage by County:** $16.44 - Alameda & Santa Clara; $15.97 - Los Angeles; $15.07 - San Joaquin

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

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

Employer may use health benefits of up to $1.44 per hour to meet the Post-Retention Wage.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Staff</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Engineers</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Leads I</td>
<td>13</td>
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<tr>
<td>Leads II</td>
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<td></td>
</tr>
<tr>
<td>Managers</td>
<td>24</td>
<td></td>
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<tr>
<td>Manufacturing Technicians</td>
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</tr>
<tr>
<td>Production Associates</td>
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<td></td>
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<tr>
<td>Supervisors I</td>
<td>13</td>
<td></td>
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<tr>
<td>Supervisors II</td>
<td>12</td>
<td></td>
</tr>
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### INTRODUCTION

Tesla Motors, Inc. (Tesla) [www.teslamotors.com](http://www.teslamotors.com), founded in 2003 in San Carlos, is a manufacturer of electric vehicles (EV), electric powertrains, and Superchargers sold to consumers. The Company uses proprietary technology, state-of-the-art design and manufacturing processes throughout its facilities in Fremont (Manufacturing), Palo Alto (Headquarters), Lathrop (Manufacturing), Newark (Warehouse,) and Hawthorne (Design Studio).

In 2012, Tesla began manufacturing a high quality, mass market EV – the Model S – in its Fremont factory. This vehicle, with a maximum range of 300 miles on a single charge and can accelerate from 0-60 in 4.4 seconds, has received numerous awards including Motor Trend’s 2013 Car of the Year. The Company has plans to extend the range of its vehicles even more by building a network of Superchargers. These Superchargers are capable of charging the Model S...
S 20 times faster than most public charging stations. The Superchargers are engineered and designed by the Palo Alto and Hawthorne facilities and manufactured in Fremont.

**AB 118**

This proposal will be funded under the AB 118 Training Program that was created in FY 2009-10. The AB 118 Program is administered by ETP in partnership with the California Energy Commission (CEC).

The overall goal of the AB 118 Program is to support a transition from petroleum-based transportation to alternative and renewable fuels and clean, low carbon vehicle technologies. There is no expenditure of Employment Training Tax funds for the AB 118 Program. Public entity employers are eligible to participate, such as city and county regional transit authorities.

Training is focused on job skills for a skilled workforce to produce and distribute new alternative fuels and design, construct, install, operate, service and maintain new fueling infrastructure and vehicles.

Alternative Fuel is defined as any fuel other than the traditional selections, gasoline and diesel from petroleum sources, used to produce energy or power. Examples of alternative fuels are: bio-diesel, ethanol, methanol, electricity, propane, compressed or liquid natural gas, and hydrogen.

**Prior Projects**

This will be Tesla’s third AB118 Agreement. The first Agreement, ET11-0804, helped the Company expand and hire staff at its manufacturing facility in Fremont. The results were dramatic as Tesla started with 75 employees at the Fremont facility and grew to 1,570 employees at the end of the contract term. Additionally, ET11-0804 also helped the Company launch its flagship Model S vehicle, the first mass market EV produced in the United States.

Tesla’s second Agreement, ET13-0803, continued to support training for the Model S. The Manufacturing Skills taught in this Agreement covered the latest manufacturing and assembly technologies including powertrain, electric motor, and battery pack assembly. However, the main focus was on continuous improvement and operational efficiency. Courses consisted of quality standards, ownership of operations, constructive feedback and team building. This second Agreement improved processes which allowed Tesla to increase manufacturing from 3,000 cars in 2012 to 35,000 cars in 2014. By 2016, it expects to increase production to 100,000 cars.

**PROJECT DETAILS**

Training under this proposal will address the Company’s plan to increase production; build an expanded battery production area; implement a second auto body line with the latest in robotics; launch a new paint shop with state of the art robots, equipment and technologies; and bring a new stamping press on line. Additionally, training will include upscaling of the Model S (including new European and Asian versions of the Model S) and new product introductions of the Model X (a crossover utility vehicle currently in early production stages, with an expected launch in late 2015) and the Model III (a larger scale production EV for mass production, due to launch in 2017).

Tesla used to outsource High and Low Pressure Casting and Machining, but has brought those processes in house to its Lathrop facility. Workers must be trained on equipment operation, CNC manufacturing, production control, and testing processes.
Tesla has additional plans for the installation of new equipment at its Palo Alto, Lathrop and Newark facilities, however the specifics are being finalized. Tesla estimates $400 million in costs for the upgrades. Occasionally, the price of the new equipment includes training. Tesla will exclude that portion of the training from the ETP funded plan.

Job Creation

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

In this proposal, Tesla has committed to hiring 975 new employees (Job Number 1). Tesla represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract.

Currently, manufacturing operations are conducted at its 5.5 million square feet Fremont facility. Tesla is expecting increasing demand for its EVs. It is expanding production, purchasing new manufacturing equipment (including automation robotics, tools, and machines) and building three additional manufacturing facilities in Fremont. Workers will be placed at Tesla’s five existing facilities. However, some workers may eventually be moved to Tesla’s new facilities after construction is completed.

High Unemployment Area

Trainees in San Joaquin County in Job Number 1 may work in a High Unemployment Area (HUA), exceeding the state average by at least 25%. For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. However, Tesla is not asking for a wage or retention modification.

Training Plan

Since its last ETP funded training, Tesla designed an intensive simulated lab, specifically designed to give employees the training experience with actual assembly tools, machinery, and working conditions in a non-productive environment. The training plan consists of Tesla’s full spectrum of EV production including powertrain components (battery packs, motors, chargers, high voltage cables), plastics molding used in production, aluminum stamping (which comprises 90% of its auto body), painting, assembling, and product quality testing. Training will also include equipment maintenance, safety operational procedures, and troubleshooting.

CBT

Additionally, Tesla recently developed its own Model S Certification video and Crane training simulator which will be delivered through Manufacturing Computer-Based Training (CBT). CBT is reimbursed at $8 per hour and capped at 50% of a trainee’s total hours.

Continuous Improvement (40%): Training will be provided to workers across all occupations. The skills introduced will highlight Tesla’s unique operations model in manufacturing and assembly processes which includes problem solving, constructive feedback, quality standards, and team building. Managers and Supervisors may undergo additional training on communications, coaching, leadership and overall team management.

Hazardous Materials (5%): Training will be offered to Engineers, Leads, Managers, Manufacturing Technicians, Production Associates, and Supervisors in high voltage precautions
and electric vehicle power pack handling skills. More in-depth training will be provided to staff who work directly in hazardous situations.

**Manufacturing Skills (40%)**: Training will be offered Engineers, Leads, Managers, Manufacturing Technicians, Production Associates, and Supervisors. Training will ensure that all staff are brought up to speed with the manufacture and assembly of emerging technologies (including stamping and forming raw aluminum, management of parts and materials flow, plastics molding and injection, assembly of components, and paint and body work) to ensure efficiency and quality during production. Components of training will focus on powertrain assembly including electric motor, battery module and pack, circuits, and software. Although Tesla utilizes robotics throughout its manufacturing processes, vehicle assembly is conducted by hand in over 100 stations by teams of workers who transform an empty shell into a full-functioning vehicle.

**Productive Laboratory**

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

Following the delivery of classroom and simulated lab training, Tesla will provide PL in Manufacturing Skills for only Manufacturing Technicians and Production Associates. Although some PL requires up to 120 hours to gain competency, ETP funded PL will not exceed 40 hours per trainee. Tesla will provide the additional 80 hours at its own costs.

All PL training will occur under the direction and supervision of a devoted trainer whose time is exclusively dedicated to training the workers in a productive environment. The training plan follows specific standardized work procedures. Trainees will operate equipment under close supervision until they have been certified as competent to work independently. Trainees will be utilizing tools and equipment, including large robots. The trainer-to-trainee ratio during PL is usually 1:1. However, on occasion when training is delivered at a work station, the ratio may increase to 1:2.

**Advanced Technology (AT)**

AT will be provided to workers whose job functions requires technical and customized courses in robotics architecture, engineering, software design and programming, and high-voltage electronics. These courses cover leading-edge technologies in electronic powertrain systems unique to Tesla, high end robotics, and software.

AT training typically requires the use of outside vendors and in-house specialists with expertise in these areas. The cost of these specialized courses will be high due to the limited pool of qualified trainers available. The Company estimates that training costs in this area will be in the range of $200 per hour. In addition, class/lab sizes will be limited to a trainer-to-trainee ratio of 1:10 to allow in-depth coverage and personal attention from the instructor.

**Commitment to Training**

Tesla estimates $1,166,660 in training expenditures during the term of the Agreement, in addition to its in-kind contribution of $833,340 in salaries paid during training. The costs include staff overseeing training, technical training writers, administrative personnel and training systems. These costs are above and beyond the investment in creating classroom space along with production-floor simulation areas and machinery used for laboratory training.
Tesla is committed to providing training to workers not included in this ETP proposal. Training is delivered in new hire orientation, supervisory, leadership, legally-mandated training, Lean Manufacturing, customer service, sales and repairs, and extensive training in safety. Tesla represents that 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

Tesla has designated the Director of Organizational Learning and Development and Onsite Coordinator as the officials responsible for oversight and administration of training. They will be dedicated to enrolling trainees, verifying rosters, tracking training hours, and resolving day-to-day issues. Additionally, approximately 30 manufacturing training coordinators will ensure training is scheduled on time and conducted according to guidelines.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0803</td>
<td>Fremont</td>
<td>05/06/2013–05/05/2015</td>
<td>$648,000</td>
<td>$648,000 (100%)</td>
</tr>
<tr>
<td>ET11-0804</td>
<td>Fremont</td>
<td>06/30/2011–03/31/2013</td>
<td>$756,000</td>
<td>$647,626 (85%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

All Crane Training USA Inc. of San Leandro has been retained to provide training for a fee of $4,000 per training session.

Lift Safe, Inc. of Danville has been retained to provide training for a fee of $570 per student.

Other trainers will be identified for ETP record-keeping purposes, as they are retained by Tesla Motors.
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT
- Tesla Operations Overview
- Plant Specific Operations
- New & Revised SOP
- Manufacturing Overview
- Problem Solving
- Data Collection and Recordkeeping

HAZARDOUS MATERIALS
- High Voltage Awareness Training for Battery Packs and Systems
- Hazardous Materials Training (e.g., adhesives, solvents, chemicals, paint used in battery pack and vehicle manufacturing)
- High Voltage Training (general awareness and precautions)

ADVANCED TECHNOLOGY (trainer to trainee ratio 1:10)
- Manufacturing Automation and Robotics Use
- Robotics Architecture and Engineering
- Robotics and Production Software Design and Programming
- Equipment Troubleshooting, Diagnostics and Repair
- Manufacturing/Assembly Process Optimization

MANUFACTURING SKILLS
Electric Vehicle (EV):
- EV Manufacturing and Assembly Processes
- EV Powertrain Manufacturing and Assembly Processes
- Body Shop Equipment Operation, Welding Equipment Operation, Maintenance and Workspace Management
- Product Excellence, Manufacturing Fit and Finish (quality and aerodynamics)
- Manufacturing Equipment Maintenance and Servicing
- Computer Programming and Software Maintenance
- Welding Equipment Operation and Maintenance
- Aluminum and Plastics Adhesive and Riveting Applications
- Stamping Operations and Maintenance
- Paint Operations, Equipment and Maintenance
- Paint Types (e.g., water borne, low VOC) and Techniques of Application
- Paint Quality, Defects, Prevention and Repair
- Plastics Shop Equipment and Operation for Bumpers and Components
- Plastic Vehicle Components Production Processes
- Robotics Operations and Maintenance
- Aluminum Welding, Adhesive and Riveting Processes
High/Low Pressure Die Casting Equipment Operation and Quality Control
Tool & Die Operations and Maintenance
Machining Operations and Maintenance
Coatings Operations and Maintenance
Vehicle and Component Service Training
Prototype Vehicle Testing
Service Training
Simulation Lab Manufacturing Process Training, Changes and Problem Solving

**PL Hours**
0 – 40

**MANUFACTURING SKILLS (limited ratio 1:2)**

- EV Manufacturing and Assembly Processes
- EV Powertrain Manufacturing and Assembly Processes
- Body Shop Equipment Operation, Welding Equipment Operation, Maintenance and Workspace Management
- Product Excellence, Manufacturing Fit and Finish (quality and aerodynamics)
- Manufacturing Equipment Maintenance and Servicing
- Computer Programming and Software Maintenance
- Welding Equipment Operation and Maintenance
- Aluminum and Plastics Adhesive and Riveting Applications
- Stamping Operations and Maintenance
- Paint Operations, Equipment and Maintenance
- Paint Types (e.g., water borne, low VOC) and Techniques of Application
- Paint Quality, Defects, Prevention and Repair
- Plastics Shop Equipment and Operation for Bumpers and Components
- Plastic Vehicle Components Production Processes
- Robotics Operations and Maintenance
- Aluminum Welding, Adhesive and Riveting Processes
- High/low Pressure Die Casting Equipment Operation and Quality Control
- Tool & Die Operations and Maintenance
- Machining Operations and Maintenance
- Coatings Operations and Maintenance
- Vehicle and Component Service Training
- Prototype Vehicle Testing

**CBT Hours**
0 – 12

**MANUFACTURING SKILLS**

- Model S Certification (1.5 hours)
- Crane Training Simulator (4-12 hours)

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. PL is capped at 40 hours per-trainee.
Training Proposal for:

The Clorox Company

Agreement Number: ET16-0165

Panel Meeting of: September 25, 2015

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

PROJECT PROFILE

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

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

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

<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 1,427</th>
<th>U.S.: 5,014</th>
<th>Worldwide: 7,670</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>14%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers/Supervisors: (% of total trainees)</td>
<td>15%</td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$475,200</td>
<td>$0</td>
<td>$0</td>
<td>$475,200</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required: $593,890
The Clorox Company  September 25, 2015  ET16-0165

TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineep Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mfg. Skills</td>
<td>1,100</td>
<td>8-200</td>
<td>0-20</td>
<td>$432</td>
</tr>
</tbody>
</table>

Minimum Wage by County: $16.44 for Alameda and $15.07 for Solano County
Health Benefits: ☒ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.

Used to meet the Post-Retention Wage?: ☒ Yes ☐ No ☐ Maybe
Up to $1.25 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production</td>
<td>150</td>
<td></td>
</tr>
<tr>
<td>Accounting, Buyer, Planner, Finance, Analyst</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>Marketing, Sales, Admin, Support Staff</td>
<td>300</td>
<td></td>
</tr>
<tr>
<td>Scientist, Engineer</td>
<td>150</td>
<td></td>
</tr>
<tr>
<td>Technical Director</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Project/Program Manager, IT</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>95</td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>75</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Established in 1913 in Oakland, The Clorox Company (Clorox) manufactures household cleaning supplies, food products, charcoal, insecticides, cat litter, water filtration systems and personal care products. Its major customers are Albertsons, Target Corporation and Wal-Mart Stores and its products are sold in more than 70 countries. Clorox has 1,427 employees in California working at its headquarters in Oakland and at three manufacturing and research and development locations in Fairfield, Pleasanton and Los Angeles.

PROJECT DETAILS

This proposal will be Clorox’s third Agreement with ETP, but the first in more than five years. Clorox states that to capture and retain customers, it must establish a lean, efficient and integrated workforce. In 2013, a new corporate strategy was established and four strategy accelerators were identified in late 2014 to meet the new corporate strategy objectives.
The four accelerators focus on technology, innovation, portfolio momentum, and accelerate a culture of growth. The accelerators are summarized below:

(1) Technology - Create a product that consumers will desire which creates repeat purchases and loyal customers,
(2) Innovation - Ensure consumers are delighted with the products which drive desire and also create “word of mouth” marketing,
(3) Portfolio - Packaging and branding to ensure consumers choose the Company’s product on the shelf among the many options on the store shelves, and
(4) Grown - Build employee and leadership capability to support the new corporate strategy.

To meet these objectives, Clorox must retrain its employees in systems and processes effectiveness by striving for supply chain optimization excellence; expanding its market through innovation, partnership, and acquisitions; utilizing intelligence and data sharing systems; and seeking sustainable solutions for product packaging. The training herein will assist Clorox in creating a more agile and effective workforce.

**Frontline Managers/Supervisors**

Technical Directors are individuals who spend over 51% of their time producing products or services. They are higher-salaried engineers with a Director title but they do not make corporate policy or manage other employees directly. Likewise, Project/Program Managers spend over 51% of their time providing services. As such, these occupational titles meet the ETP definition of a “frontline worker” and do not count toward the 20% cap on Managers/Supervisors.

**Training Plan**

Training will be provided at the employer sites and will include employees from the Oakland, Pleasanton and Fairfield facilities. Business Skills, Computer Skills, and Continuous Improvement training will be delivered via Class/Lab and Computer-Based Training methods.

**Business Skills (20%)**: Training will be offered to all occupations in company products, accounting, superior customer service, sales, marketing strategies and project efficiency. Training related to Marketing, Sales and R&D will include new product development, consumer trends, new research methods, and e-commerce.

**Computer Skills (20%)**: Training will be offered to all occupations as new programs such as SharePoint and Yammer are introduced and implemented. As print advertising change into digital media, Sales/Marketing Staff will need to learn the best ways to use social media as a new means of advertising products. Production Staff will learn various aspects of the SAP manufacturing software systems to control product warehousing, track production and improve delivery times. All occupations need adequate training to operate various desktop tools to increase output and accuracy.

**Continuous Improvement (40%)**: Training will be offered to all occupations to learn teambuilding, identify ways to improve product quality, identify and resolve production issues, eliminate waste, reduce costs, improve efficiency, and increase productivity. Leadership and coaching skills will help Managers and Supervisors lead staff in the right direction to improve work flow, social collaboration and process improvement.

**Manufacturing Skills (20%)**: Training will be offered to Production Staff, Engineers, Managers and Supervisors. Topics include equipment operation efficiency, product labeling process & controls, Lean manufacturing techniques, packaging, shipping, inventory processes, workflow,
testing and troubleshooting, warehouse and Inventory processes. The goal is to improve manufacturing processes while producing quality products at a lower cost. Production Staff will also be cross-trained on different product lines.

**Commitment to Training**

Clorox has an annual training budget of approximately $700,000 for the California facilities, which includes new-hire orientation, compliance training, health & safety and basic computer skills. 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 HR Manager and training team will oversee the implementation of the training program and be responsible for internal administration. An administrative subcontract will be hired to assist with project administration.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**DEVELOPMENT SERVICES**

California Training Administration in Rocklin assisted with development of this proposal for $8,500.

**ADMINISTRATIVE SERVICES**

California Training Administration will also perform administrative services in connection with this proposal for a fee not to exceed 10% of payment earned.

**TRAINING VENDORS**

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200

Trainees may receive any of the following:

BUSINESS SKILLS
- Research & Development/Engineering
  - Create/Manage Global Capability
  - Develop/Test Biodegradable Plastics
  - Discovery into New Product Categories
  - Green Product Design
- Healthcare Products Regulatory Processes (Aplicare, HealthLink)
  - Open Innovation/New Technologies
  - Packaging Innovation and Engineering
  - Product/Packaging Design
  - Product Innovation & Engineering
  - R&D Team Planning & Technology (Research tools and Techniques)
- Marketing Solutions & Strategies
  - Advanced Analytics
  - eCommerce/Consumer Trends
  - Global Insights & Foresights
  - GreenWorks Product Awareness
  - Global Strategic Sourcing Process
  - Integrated 3D (decide, desire, delight) Insights
  - Integrated Marketing Communications
  - Marketing Intelligence Department Process
  - New Product Marketing
  - Product Supply Organization Process
  - Sense and Respond Marketing
  - Social Media/Digital Media
  - Syndicated Data & Systems Training (for Marketing)
- Finance and Accounting Techniques
  - Budget and Forecast Updates
  - Clorox Financial Statements
  - Cost: Buy, Make, Ship Lab
  - Directional Estimates
  - Foreign Exchange and How it Impacts Clorox
  - Impact of Taxes on Financial Success
  - Introduction to Pricing
  - Investor Relations – How to Better Compete Financially
  - Planning Cycle Overview
  - Pricing Profit and Loss Usage
  - Risk and Controls
  - Strategic Planning and Analysis
  - Total Deliver Cost Overview
  - Trade Funds: Sales, Forecasting
  - Treasury: Cash Forecasting – Uses and Sources of Cash
  - Valuation Techniques – Concept of Time Value of Money
• Business Acumen
• Change Management
• Customer Satisfaction/Client Services Techniques
• IT Budget & Forecasting Application (Apptio)
• IT Business Processes
• IT Vendor Governance
• Negotiating Fundamentals
• Presentation Skills
• Process Improvements/Workflow
• Program/Project Management
• Strategic Planning

**COMPUTER SKILLS**
• APO (Supply Chain Management Tool)
• Business Intelligence (OBIEE, IDR)
• CAS (Shelving Assortment System)
• Collaboration Tools/Yammer, Jive, GoToMeeting
• End to End (Sales & Planning) Total Delivered Cost
• ERP (Enterprise Software)
• eTime (Payroll Tracking System)
• Financial/Accounting Tools
• Government Management Tools for Risk Analysis
• Human Capital Management Systems
• Hyperion Financial System
• Master Data Management Tools
• Microsoft Office Tools (Intermediate/Advanced)
• Oracle Tools
• Packaging Technical Design Tools
• Product Data Management System
• Product Lifecycle Management Tool
• Project Support/IS Road-mapping
• SAP Integration & Tools
• SharePoint/Ishare
• Siebel (Customer Relations Management Tool)
• Systems Management Access Reporting Tool
• Social Media/Digital Media (yahoo, google, facebook)
• Supply Relations Management Tool
• Technical Solutions (Designs & Integration)
• Trade Promotion Management Tool
• Trade Promotion Optimization Tool
• Trade Spending Reporting Tools
• Transportation Management System (Nistevo) - Logistics
• Treasury System
• Tru-Cost
• Web Conferencing - Microsoft Link, Movi, GoToMeeting, Webex
• World Class Close
CONTINUOUS IMPROVEMENT
- Agile Enterprise
- Agile Scrum Master
- High Performing Work Teams
- Quality 101 Concepts (Lean, SPC, Six Sigma, Kaizen)
- Risk Management
- Safety, Product Quality, Availability, Costovation, Enabling Innovation
- Teams & Work-Group Problem Solving
- Workplace Communications
- IT Service Management
  - IT Infrastructure Library Foundation
  - IT Infrastructure Library Service Strategy
  - IT Infrastructure Library Service Design
  - IT Infrastructure Library Service Transition
  - IT Infrastructure Library Service Operation
  - IT Infrastructure Library Continuous Improvement
- Leadership Development and Coaching
  - Diamond Leadership Training
  - Effectiveness & Diversity
  - Employee Effectiveness and Efficiency
  - Employee Engagement
  - Individual Contributor Capability Development
  - People Manager Capability
  - Performance Improvements
  - The Clorox Leadership Model Design & Implementation

MANUFACTURING SKILLS
- Clean Room (Bleach, Chlorine, Mercury, Lead)
- Cross Training Production Equipment
- Equipment Operation/SafeStart
- Lean Manufacturing Techniques
- Packaging/Shipping/Inventory Processes
- Product Labeling Process & Controls – Labeling Products
- Product Transfer/WorkFlow
- Production Floor Processes
- Restricting of Hazardous Substances
- Technical Qualifications and Certifications
- Testing and Troubleshooting Skills
- Warehouse and Inventory
- World Class Organization
CBT Hours
0-20

BUSINESS SKILLS
- Basic Presentation Skills: Creating a Presentation (1)
- Basic Presentation Skills: Delivering a Presentation (1)
- Basic Presentation Skills: Planning a Presentation (1)
- Basic Projects within Organizations (PMBOK Guide Fifth Edition) (1.5)
- Budgeting (2)
- Business Writing: Know Your Readers and Your Purpose (1)
- Change Management (2)
- Customer Service in the Field (1)
- Customer Service over the Phone (1)
- Customer Service: Building Rapport in Customer Relationships (1)
- Customer Service: Confrontation and Conflict (1)
- Decision Making: Making Tough Decisions (1)
- Decision Making: The Fundamentals (1)
- Decision Making: Tools and Techniques (1)
- Developing & Using Strategic Thinking Skills: Seeing the Big Picture (1)
- Generating Creative and Innovative Ideas: Maximizing Team Creativity (1)
- Internal Customer Service (1)
- Interpersonal Communication: Being Approachable (1)
- Interpersonal Communication: Communicating Assertively (1)
- Interpersonal Communication: Communicating with Confidence (1)
- Interpersonal Communication: Listening Essentials (1)
- Interpersonal Communication: Targeting Your Message (1)
- Leading Innovation (1)
- Leading with Emotional Intelligence (1)
- Managing a Mobile Team (2)
- Managing Projects within Organizations (PMBOK Guide Fifth Edition) (2)
- Motivating Employees (1)
- National Merchandising Vehicle Forecast (2)
- Negotiating (3)
- New Manager Transitions (2)
- Principles of Accounting and Finance for Non-Financial Professionals (1)
- Process Improvement (1)
- Project Management Overview (PMBOK Guide Fifth Edition) (1.5)
- Public Speaking Strategies: Confident Public Speaking (1)
- Public Speaking Strategies: Preparing Effective Speeches (1)
- Sales Volume Planning (2)
- Siebel training for Sales (1)
- Strategic Thinking (2)
- Strategy Execution (2)
- Time Management: Analyzing Your Use of Time (1)
- Time Management: Avoiding Time Stealers (1)
- Time Management: Planning and Prioritizing Your Time (1)
- Trade Funds Management (2)
COMPUTER SKILLS

- Advanced Customization in Excel 2007 (2)
- Advanced Data Management in Excel 2007 (1.5)
- Advanced Formatting in Excel 2007 (2)
- Analyzing Data in Excel 2007 (3.5)
- Excel 2007 Charts, Pictures, Themes and Styles (1.5)
- Excel 2007 Formulas and Functions (2)
- Exchanging Data with Excel 2007 (3)
- Manipulating and Formatting Data and Worksheets in Excel 2007 (3)
- Protecting and Sharing Excel 2007 Workbooks (2)
- myLearning: How to Use for Learners and Managers (1)
- HR Sap Reporting (1)
- Accounting Policies and Procedures Overview (.25)
- Balance Sheet Account Reconciliation (.25)
- Balance Sheet Reconciliation for Cost (.25)
- Consumer Budget Sales Reporting (.5)
- Cost Savings (.25)
- Cost Savings Forecast and Close (.25)
- Category Performance Fund Rate Check – Forecasting Trade Funds (.25)
- Demand Creation Sales Finance Overview (.25)
- Forecast Price Check (.25)
- Gap Forecast (.5)
- Graphics Set-Up Charges (.25)
- Hyperion Financial Management Late Entries (.25)
- Impact of US GAAP Adjustments to Effective Tax Rate (.25)
- Intercompany Process Overview Transactions Between 2 or More Clorox Legal Entities (.25)
- Inventory Effect (.25)
- Inventory Reporting (.25)
- LIFO Reserve – Gap between FIFO and LIFO Costs (.25)
- Operating at Standard calculates the operating expense on the P&L Related to Shipment/Sales in a Given Period (.25)
- Over/Under Absorption Impact of Plant Over/Under Spending on Financial Statements (.5)
- Personnel Pay Reports (.25)
- Profit Improvement Team (PIT) (.25)
- Pivot Tables Workshop: Part 1 (.5)
- Pivot Tables Workshop: Part 2 (.5)
- Product Costing Overview (.5)
- Production Variance (.25)
- Purchase Price Variance (.25)
- R/3 Load Loading Forecasting Data into SAP and Adjustments into SEM (.5)
- Rebates (.25)
- SAP Basics (.25)
- SAP Tips and Tricks (.25)
- Stat Factors Providing a Common Unit of Measurement Across Brands (.25)
- Total Delivered Cost Rate Variance (.25)
- Topline Creation Summary of Key Change Business Drivers (.75)
- Transfer Pricing (.25)
- U.S. GAAP International Income Tax Accounting - Part 1 (.25)
- U.S. GAAP International Income Tax Accounting - Part 2 (.25)
- Volume, Mix, and Assortment – the Change in Profit Due to Selling in a Different Quantity or Mix of Products (.25)

**CONTINUOUS IMPROVEMENT**
- Applying Lean in Service and Manufacturing Organizations (1)
- Being an Effective Team Member (1)
- Building Your Influence as a Leader (1)
- Developing a High-Performance Organization (1)
- Innovation and Creativity (2)
- Intro to Lean for Service and Manufacturing Organizations (1)
- Lean Tools and Techniques for Flow and Pull (1)
- Problem Solving: Determining and Building Your Strengths (1)
- Problem Solving: Digging Deeper (1)
- Problem Solving: The Fundamentals (1)
- Reducing Waste and Streamlining Value Flow Using Lean (1)
- Using Lean for Perfection and Quality (1)
- Value Stream Mapping in Lean Business (1)

**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.
RETRAINED - JOB CREATION

Training Proposal for:

Bell Brother’s Heating and Air, Inc.

Agreement Number: ET16-0177

Panel Meeting of: September 25, 2015

ETP Regional Office: Sacramento

Analyst: M. Jones

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>HUA</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Job Creation Initiative</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Veterans</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Counties Served:</td>
<td>Sacramento, Stanislaus</td>
<td>Repeat Contractor:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
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<tr>
<td></td>
<td></td>
<td>Repeat Contractor:</td>
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<tr>
<td>Union(s):</td>
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<td>Union(s):</td>
<td>No</td>
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<tr>
<td>Turnover Rate:</td>
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<tr>
<td>Managers/Supervisors:</td>
<td>7%</td>
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</table>

FUNDING DETAIL

Program Costs

| $560,000 |

(Substantial Contribution) | $0 |

(High Earner Reduction) | $0 |

= Total ETP Funding

| $560,000 |

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

<p>| $598,000 |</p>
<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials, OSHA 10/30, PL Commercial Skills</td>
<td>144</td>
<td>8-200</td>
<td>0</td>
<td>$2,520</td>
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<tr>
<td>2</td>
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<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials, OSHA 10/30, PL Commercial Skills</td>
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<td>4</td>
<td>Job Creation Initiative</td>
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<td>10</td>
<td>8-200</td>
<td>0</td>
<td>$3,850</td>
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</table>
Minimum Wage by County: Job Number 1: $15.75 for Sacramento County
Job Number 2 (HUA): $11.30 for Stanislaus County
Job Number 3 (Job Creation): $13.13 for Sacramento County and $12.33 for Stanislaus County
Job Number 4 (Veteran): $13.13 for Sacramento County and $12.33 for Stanislaus County

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

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

Up to $2.29 per hour may be used to meet the Post-Retention Wage for Jobs 1 - 4.

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
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</thead>
<tbody>
<tr>
<td><strong>Job Number 1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technician</td>
<td></td>
<td>55</td>
</tr>
<tr>
<td>Administrative Staff</td>
<td></td>
<td>20</td>
</tr>
<tr>
<td>Sales Staff</td>
<td></td>
<td>13</td>
</tr>
<tr>
<td>Installer</td>
<td></td>
<td>35</td>
</tr>
<tr>
<td>Plumber</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td>11</td>
</tr>
<tr>
<td><strong>Job Number 2:</strong></td>
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<td></td>
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<tr>
<td>Technician</td>
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<td>5</td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td><strong>Job Number 3 (Job Creation):</strong></td>
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<td></td>
</tr>
<tr>
<td>Technician</td>
<td></td>
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<tr>
<td>Sales Staff</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Installer</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Plumber</td>
<td></td>
<td>9</td>
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<tr>
<td>Manager</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td><strong>Job Number 4 (Veterans):</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technician</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Administrative Staff</td>
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<td>2</td>
</tr>
<tr>
<td>Sales Staff</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Installer</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Plumber</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>
INTRODUCTION

Founded in 1991 and headquartered in Mather, Bell Brother’s Heating and Air, Inc. (Bell Brother’s) provides heating, ventilation, air conditioning, plumbing installation, and repair, diagnostic services to residential homeowners or tenants.

PROJECT DETAILS

California Code of Regulations, Title 24, Part 6, California Building Standards Code, also titled The Energy Efficiency Standards for Residential and Nonresidential Buildings, was created by the California Building Standards Commission in 1978 to reduce California energy consumption. The standards are updated periodically by the California Energy Commission to allow consideration and possible incorporation of new energy efficiency technologies and methods.

Need For Training

This will be the second Agreement between ETP and Bell Brother’s. The first contract focused on specific segments of Commercial Skills training. In this proposal Bell Brother’s plans to institute plumbing and glass installation training, HVAC training and remaining training that didn’t occur during the current agreement to all incumbent and newly hired trainees. Bell Brother’s had successfully trained only a small portion of the prior curriculum leading to the weighted average training hours needing to be increased. This would allow more training per trainee.

Bell Brother’s has exhausted all funding in their current contract. Bell Brother’s created a curriculum to follow the regulations and guidelines of Title 24 as well as the expected standards of the Company to be trained to all staff. As of January 1, 2016, the expected changes to Title 24 will go into effect thus, creating more need for training. Although not all changes are known, some however have been recently adopted such as:

- Increased requirement for documentation, charts, calculations and verifications in home build design, ductwork, airflow and equipment sizing
- All building air leak thresholds. Current levels of air leak inefficiencies at 15% will now be reduced to 5%
- Cold weather charging and verification in front of Herz rater and confirm the metering device is working correctly, weigh in charging rules and specifications
- Adding of insulation to locations previously not needed

Green/Clean

Bell Brother’s is involved in Green, Clean technology with several recent changes to California Title 24 which requires substantial increases in heat and cooling efficiency along with air quality and ventilation systems. Bell Brother’s services and installs systems known as “Nano air” that uses nanotechnology to eliminate the use of common refrigerants such as CFC/HCFC. This technology harnesses Nano particles and doesn’t use cooling agents like fluorocarbons, thus cutting the carbon footprint by 50%, and toxic CO2 emissions are reduced by 57%.

Retrainee – Job Creation

In support of job creation, the Panel is offering incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate, and trainees will be subject to a lower post-retention wage.
Bell Brother’s has committed to hiring 51 new employees as shown in Job Numbers 3 and 4. The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract.

Bell Brother’s plans to train newly-hired staff to achieve competence with technology, installation and repair methods in its full service training center located at the Mather location. Additionally, Bell Brother’s has expanded its operations taking on plumbing installation, whole house fans, residential glass and pool pumping systems, which will all require training. The Company has created an extensive and in depth training plan for new hires that includes 120 hours of training in the first 6 weeks of employment and 80 hours of additional training within the first year because it was discovered that the technicians trained in traditional programs or by trade schools lacked the necessary skills to perform up to company standards. Bell Brother’s expanded operations into the Central Valley with a new facility in Manteca that opened in May and another training facility in Elk Grove opening within the next six months. With the expansion, additional staffing will be required which is currently underway, and those newly hired employees will need extensive training.

**PROJECT DETAILS**

**Training Plan**

**Business Skills** (20%) - Training will be offered to all occupations. Courses include sales procedures and strategies, customer needs, communication, negotiation skills, conflict management, marketing, and presentation skills. This training will focus on advanced sales techniques, improving customer interaction, and upgrading transaction processes.

**Commercial Skills** (20%) - Training will be offered to Technicians and Installers to meet energy efficiency standard changes. Training will include topics such as mini-splits, inverter technology, smart system controllers, compression fittings, trenchless replacements, plumbing for mobile homes, metal sash, residential glass code and glass layout. Training will focus on new technology, equipment, and tools to install, repair, and diagnose energy efficient HVAC systems, plumbing and glass installations.

**Computer Skills** (5%) - Training will be offered to all occupations. Courses include Successware and regulatory code research techniques. This training will provide the Administrative and Sales Staff with necessary skills to facilitate the logistical and managerial aspects of the business, and the Technicians the skills to research methods to ascertain code parameters with regard building codes.

**Continuous Improvement** (20%) - Training will be offered to all occupations to increase operational efficiency, improve quality control, build effective teams, and implement lean strategies. Courses include Team Building, Root Cause Analysis, Logistical Efficiency and Lean Production.

**Hazardous Material** (5%) - Training will be offered to Technicians and Installers to understand proper handling and disposal of hazardous material.

**OSHA 10/30** (10%) – Training will be offered to Technicians, Installers, Plumbers, and Administrative Staff.

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

**Productive Laboratory**

PL trainees may produce goods for profit as part of the PL training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training, and special attendance rosters will be used to assist in monitoring.

Installers and Technicians will receive PL training on thermal dynamics, heat pump systems, smart systems, copper pipe fittings, corrugated stainless steel tubing, water heaters, back flow systems, water supply treatment systems, and metal sash. Bell Brother's will provide up to 60 hours of PL in HVAC, Plumbing and Glass to its trainees from the approved ETP Curriculum.

The Company determined that hands-on training, when paired with classroom training, is the best training technique for trainees. PL training will have a ratio of either 1:1 or 1:2 as some training requires a “team” of 2 trainees. For instance, the installation of a heat pump or air conditioning unit will require 2 technicians to perform the task. As such, the ratio would need to increase in this and similar situations.

**Commitment to Training**

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

The Company currently spends approximately $666,500 on training annually. The Company currently provides basic sales, phone etiquette, customer service and software training to Administrative and Sales Staff. Newly-hired Technicians and Installers receive core technical training within the first six weeks of employment. Bell Brother's also provides job-specific regulatory training, and company-wide ethics and values initiatives.

**High Unemployment Area**

All trainees Job Number 2, 3 and 4 work in a High Unemployment Area (HUA), regions with unemployment exceeding the state average by at least 25%. The Company’s locations in Stanislaus County qualify for HUA status under these standards. For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages.

Bell Brother’s is asking for a wage modification for trainees in Job Number 2.

**Veterans Program**

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Currently Bell Brother’s is working with California Workforce Services for the hiring of veterans as well as other veteran service locations.
Curriculum

At least 50% of total training in Job Number 4 must consist of vocational skills training. The remaining hours may consist of literacy training, as an exception to the standard 45% limitation.

ACTIVE PROJECTS

The following table summarizes performance by Bell Brother’s under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
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</thead>
<tbody>
<tr>
<td>ET15-0195</td>
<td>$154,584</td>
<td>07/01/14 – 06/30/16</td>
<td>113</td>
<td>12</td>
<td>0</td>
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</tbody>
</table>

Based on ETP Systems, 9,002 reimbursable hours have been tracked for potential earnings of $154,584 (100% of approved amount). To date, Bell Brother has earned $48,060 with two Pay 2 Invoices totaling $72,106.50 pending approval. The Retention period will end September 22, 2015, and Contractor will submit the Final Invoice September 23, 2015. The Contractor projects final earnings of 100%.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Bell Brother’s retained Synergy Management Consultants, LLC in Grass Valley to assist with development of this proposal for a flat fee of $33,600.

ADMINISTRATIVE SERVICES

Bell Brother’s also retained Synergy Management Consultants, LLC to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Sales Procedures and Strategies
- Communication
- Customer Needs Assessment and Relationship Training
- Negotiation Skills
- Conflict Management
- Marketing
- Presentation Skills

**COMMERCIAL SKILLS**

**HVAC:**
- Thermal Dynamics
- Switches and Electrical Components
- Heat Pump Systems
- Air Conditioning Systems
- Metering Devices
- System Controls/Smart System Controllers
- Motors
- Inverter Technology
- Digital Tools
- Wiring
- Thermostats
- Tune-Up Procedures
- Field Tools/Gauges
- Digital Tools/Gauges
- Air Quality Diagnostics and Methodologies
- Inverter Type Motors
- Ventilation Systems
- Insulating/Barriers Methodologies
- Barriers Methodologies

**PLUMBING:**
- Plumbing Safety
- Basic Tools
- Specialized Tools
- Drawings/Plans
- Pipes and Fittings including Install
- Compression Fittings
- Fixtures and Faucets including Install
- Disposals
- Drains-Roof/Floor and Area
- Valves
- Water Heaters
• On Demand Hot Water Systems
• Pipes and Supply Lines
• Gas and Fuel Systems
• Back Flow Systems
• Sewage and Pump Systems
• Venting
• Water Pressure Booster and Recirc Systems
• Water Supply Treatment Systems
• Plumbing for Mobile Homes
• Diagnostics
• Septic Systems
• Video Inspection
• Trenchless Replacements
• Plumbing Codes

GLASS:
• Glass Materials
• Diagnostics and Measuring
• Cutting Tools
• Cutting and Handling Glass
• Metal Sash
• Mirror, Shower Doors and Tub Enclosures
• Safety Glass Procedures
• Sealants
• Residential Glass Code
• Remodel Replacement
• Encapsulated Glass Procedures
• Glass Layout
• Building Design
• Title 24 Standards

COMPUTER SKILLS
• Successware (proprietary HVAC management software) skills
• Regulatory Code Research Techniques

CONTINUOUS IMPROVEMENT
• Leadership skills
• Team Building
• Root Cause Analysis
• Quality Control/Systems
• Logistics Efficiency
• Kaizen Event Strategy and Implementation.
• Lean Production

HAZARDOUS MATERIALS
• Coolant Systems - HAZMAT Handling
• HAZMAT Safety
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 cap does not apply to OSHA 10/30)

Productive Lab Hours

0 - 60

COMMERCIAL SKILLS (limited ratio 1:2)

HVAC:
- Switches and Thermal Dynamics
- Electrical Components
- Heat Pump Systems
- Air Conditioning Systems
- Metering Devices
- System Controls/Smart System Controllers
- Motors
- Inverter Type Systems/Technology
- Whole Home Fans
- Digital Tools
- Wiring
- Thermostats
- Tune-Up Procedures
- Air Quality Diagnostics and Methodologies
- Ventilation systems
- Barriers Methodologies
- Diagnostics
- Customer Engagement/Retention
- Conflict Management
- Scheduling/Logistics

PLUMBING:
- Drawings/Plans
- Pipes and Fittings including Install
- Copper and Fittings
- Cast Iron Pipe and Fittings
- Corrugated Stainless Steel Tubing
- Fixture and Faucets Including Install
- Disposals
- Drains-Roof/Floor and Area
- Valves
- Water Heaters
- On Demand Hot Water Systems
- Pipes and Supply Lines
- Gas and Fuel Systems
- Back Flow Systems
• Sewage and Pump Systems
• Locating Buried Water/Sewer Lines
• Venting
• Water Pressure Booster and Recirc Systems
• Water Supply Treatment Systems
• Plumbing for Mobile Homes
• Septic Systems
• Video Inspection
• Trenchless Replacements

**GLASS:**
• Glass Materials
• Diagnostics and Measuring
• Cutting Tools
• Cutting and Handling Glass
• Metal Sash
• Mirror, Shower Doors and Tub Enclosures
• Safety Glass Procedures
• Sealants
• Residential Glass Code
• Remodel Replacement

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

Training Proposal for:

Fowler Packing Company, Inc.

Agreement Number: ET16-0210

Panel Meeting of: September 25, 2015

ETP Regional Office: Sacramento

Analyst: W. Sabah

**PROJECT PROFILE**

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraining Retrainer</th>
<th>Priority Rate</th>
<th>HUA RESPOND (Core Funds)</th>
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</thead>
<tbody>
<tr>
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<table>
<thead>
<tr>
<th>Industry Sector(s):</th>
<th>Agriculture</th>
<th>Manufacturing</th>
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<tbody>
<tr>
<td>Priority Industry:</td>
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</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
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</table>

<table>
<thead>
<tr>
<th>Repeat Contractor:</th>
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<th>☐ No</th>
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</table>

<table>
<thead>
<tr>
<th>Union(s):</th>
<th>☐ Yes</th>
<th>☑ No</th>
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<table>
<thead>
<tr>
<th>Number of Employees in:</th>
<th>CA: 400</th>
<th>U.S.: 401</th>
<th>Worldwide: 401</th>
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<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>5%</th>
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</table>

<table>
<thead>
<tr>
<th>Managers/Supervisors: (% of total trainees)</th>
<th>17%</th>
</tr>
</thead>
</table>

**FUNDING DETAIL**

All funding is from the "core" Employment Training Fund as authorized for the RESPOND program.

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$348,750</td>
<td>$0</td>
<td>$0</td>
<td>$348,750</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In-Kind Contribution:</th>
<th>100% of Total ETP Funding Required</th>
<th>$352,125</th>
</tr>
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</table>
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority Rate HUA</td>
<td>Computer Skills, Continuous Improv, Mfg Skills</td>
<td>155</td>
<td>8-200</td>
<td>0</td>
<td>$2,250</td>
</tr>
</tbody>
</table>

*It will be made a condition of contract that the trainees in this Job Number will never be paid less than the statewide minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table.*

**Minimum Wage by County:** $11.30 per hour for Job Number 1 in Fresno County.

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

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

Up to $1.61 per hour may be used to meet the Post-Retention Wage.

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative Staff</td>
<td></td>
<td>60</td>
</tr>
<tr>
<td>Sales Staff</td>
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<td>7</td>
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<tr>
<td>Accountant</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>Shipping Staff</td>
<td></td>
<td>20</td>
</tr>
<tr>
<td>Production Lead</td>
<td></td>
<td>10</td>
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<tr>
<td>Maintenance Staff</td>
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<td>Quality Control Staff</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>Supervisor</td>
<td></td>
<td>27</td>
</tr>
</tbody>
</table>

**RESPOND/Drought**

The Rapid Employment Strategies Pilot on Natural Disasters (RESPOND) pilot program was adopted by the Panel in early 2014 to fund training in designated drought areas. The drought is impacting several key industry sectors (e.g. agriculture) and could lead to loss of jobs. Hardest hit are the San Joaquin Valley and Central Coast areas, although a total of 24 counties have been identified by the Governor’s Office. The RESPOND pilot is intended to support displaced workers; avert layoffs; and help employers transition to more sustainable operations and practices.

**INTRODUCTION**

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

Fowler Packing has been faced with unprecedented challenges to many agricultural services in Northern California. In addition, the fresh produce industry (a volatile market with fluctuating prices) is highly competitive as buyers demand the highest quality and lowest pricing.

**PROJECT DETAILS**

Fowler Packing plans to remain competitive in the industry by providing staff with the knowledge to properly utilize new technology. Many of the Company’s employees have never been educated on computers or trained on the key components of new machines. This training plan will address this challenge in an effort to help the Company reach its goals of decreasing water usage and increasing efficiencies.

Fowler Packing upgraded its Enterprise Resource Planning (ERP) software to improve efficiencies and increase productivity. Most departments were not utilizing the former ERP software and used manual processes to accomplish day-to-day tasks. Training will enable the Company to automate its processes and improve business functions such as harvest and production planning, budgeting, inventory management, accounting, purchasing, sales, and more.

Additionally, Fowler Packing will expand its original 24 lane fruit processing line to a 48 lane processing line. Training on the larger grading, sorting and sizing processing lines will allow employees to save more fruit and increase quality of fruit boxes being shipped. The Company will also install efficient nozzles in these processing lines to monitor water usage and ultimately conserve water.

Lastly, the Company recently purchased an automated irrigation system for the table grapes and mandarin fields. The wireless pump controllers will allow the Company to monitor soil moisture and optimize irrigation across 15,000 acres with a simple computer application. Staff will be able to control the startup and shutdown of the pump remotely. They will also receive consistent feedback from the sensors to monitor soil moisture so that they can water only when needed. This will allow the Company to water only when necessary.

**Training Plan**

**Computer Skills** (50%): Training will be offered to all occupations to improve internal processes and increase employee’s proficiency in the use of various business software solutions. Training on the newly updated Enterprise Resource Planning (ERP) software will allow trainees to plan, schedule and adjust business processes in a single system.

**Continuous Improvement** (10%): Training will be offered to Production Leads, Maintenance Staff, Quality Control Staff and Supervisors. Training will enable staff to enact continual changes during the main harvest season rather than during a period when changes have minimal impact.

**Manufacturing Skills** (40%): Training will be offered to Shipping Staff, Production Leads, Maintenance Staff, Quality Control Staff and Supervisors. Staff will receive training on the new grading, sorting and sizing equipment and Automated Irrigation System to increase the quality of fruit. It will also allow trainees to safely handle new equipment.
Commitment to Training

Fowler Packing currently has an annual training budget of $174,000, which includes state mandated compliance and food safety training. Fowler Packing represents that 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

Fowler Packing has identified three employees that will administer the ETP project. The employees will coordinate with managers of each project to schedule training as new equipment and software are introduced. Trainers will be in-house specialists who are experts in their fields.

High Unemployment Area

The 155 trainees in Job Number 1 work in Fresno County, a High Unemployment Area (HUA) with unemployment exceeding the state average by 25%. The Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. Fowler Packing is requesting a wage modification to $11.30 per hour, inclusive of health benefits, for Maintenance Staff and Quality Control Staff and $12.47 per hour for Supervisors.

Impact/Outcome

Training is expected to improve water usage efficiencies and increase staff knowledge in Computer and Manufacturing Skills. Employees will receive certifications on different types of equipment after they have been deemed competent. After the completion of training, the Company will use less water for farming and improve internal processes with the addition of new technology.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

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

COMPUTER SKILLS
• Computerized Scheduling
• Sales Forecasting
• Material Resource Planning
• Supply Chain Management
• Inventory Control
• Purchase Order Tracking
• Cost Accounting
• Payroll
• General Accounting
• Enterprise Resource Planning (ERP)
• Warehouse Management
• Farm Costing
• Resource Planning
• Microsoft Dynamics NAV
• Microsoft Office Suite (Intermediate/Advanced)

CONTINUOUS IMPROVEMENT
• Analyzing and Reporting Data
• Analyzing Improvement Opportunities
• Effective Meetings
• Eliminating Waste
• Just-in-Time Processes
• Production Scheduling

MANUFACTURING SKILLS
• Automated Packaging Equipment
• Automated Irrigation System
• Box Forming Equipment
• Control Systems
• Conveyor Systems
• Documenting Traceability
• Electronic Graders
• Electronic Systems
• Equipment Set-Up and Testing
• Food Safety*
• Forklift
• Good Manufacturing Practices
• Grading Systems for Fruit
• Inspection for Quality
• Inventory Control
• Load Accuracy
• Machine Guarding
• Machine Operation
• Mechanical Systems
- Operating Automated Palletizers
- Operating Automated Shrink Wrapping Systems
- Preventive Maintenance
- Quality Control Systems
- Receiving Process
- Refrigeration Systems
- Sanitation Procedures
- Shipping Process
- Sizing Systems for Fruit
- Sorting Systems
- Troubleshooting
- Wash System
- Safe Working Conditions*
- Safety Leadership*

*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:
Siemens Industry, Inc.
Agreement Number: ET16-0187

Panel Meeting of: September 25, 2015
ETP Regional Office: Sacramento
Analyst: M. Mazzone

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Job Creation Initiative Retrainee Priority Rate Veterans</th>
<th>Industry Sector(s):</th>
<th>Manufacturing Engineering</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Sacramento</td>
<td>Repeat Contractor:</td>
<td>Yes</td>
</tr>
<tr>
<td>Union(s):</td>
<td>□ Yes □ No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Number of Employees in: CA: 2,134 U.S.: 18,785 Worldwide: 343,000

Turnover Rate: 3%
Managers/Supervisors: 2%

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$599,760</td>
<td>$0</td>
<td>$0</td>
<td>$599,760</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $1,147,720
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Impv., Hazardous Materials, Literacy Skills, Mgmt. Skills, Mfg Skills, OSHA 10/30, PL - Mfg Skills</td>
<td>327</td>
<td>8-200</td>
<td>0-60</td>
<td>$720</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Job Creation Initiative Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Impv., Hazardous Materials, Literacy Skills, Mgmt. Skills, Mfg Skills, OSHA 10/30, PL - Mfg Skills</td>
<td>242</td>
<td>8-200</td>
<td>0-60</td>
<td>$1,460</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Retrainee Job Creation Initiative Veteran Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Impv., Hazardous Materials, Literacy Skills, Mgmt. Skills, Mfg Skills, OSHA 10/30, PL - Mfg Skills</td>
<td>10</td>
<td>8-200</td>
<td>0-60</td>
<td>$1,100</td>
</tr>
</tbody>
</table>

Minimum Wage by County: Job Number 1: $15.75 per hour (Retrainees); Job Number 2: $13.13 per hour (Job Creation); and Job Number 3: $13.13 per hour (Veteran).

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 $2.02 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Number 1 (Retrainees)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fitter/Welder</td>
<td>72</td>
<td></td>
</tr>
<tr>
<td>Assembler</td>
<td>150</td>
<td></td>
</tr>
<tr>
<td>Job Number 2 (Job Creation)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>----------</td>
<td></td>
</tr>
<tr>
<td>Fitter/Welder</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Assembler</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td>Painter</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Blaster</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Primer</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Spackler</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>CNC Machinist</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Certified Welding Inspector</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Inspector</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Equipment Operator</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Robot Operator</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Material Handler</td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Number 3 (Veteran – Job Creation)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Welder</td>
<td>10</td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Siemens Industry, Inc. (Siemens) is a subsidiary of Siemens AG, a global technology powerhouse that has stood for engineering excellence, innovation, quality and reliability for more than 165 years.

Founded in 1972 and located in Sacramento is Siemens’ Mobility Division, a leading producer of rail vehicles for the transport of people and goods. Siemens’ Mobility division designs and manufactures across the entire spectrum of rolling stock (rail transportation vehicles), including commuter and regional passenger trains, light-rail and streetcars, metros, locomotives, passenger coaches and high speed trainsets. Customers such as cities and railroad companies...
also rely on Siemens to provide traction-power substations and electricity transmission, as well as signaling and control technology for freight and passenger rail and transit systems.

**NEED FOR TRAINING**

Siemens has committed a substantial amount of time and resources to update their Sacramento facility. Expansion and updates to this facility were required to meet an increased demand for rolling stock. Siemens has secured multiple new contracts for the production of over 362 rolling stock units including light-rail vehicles, locomotives, passenger cars, diesel-electric locomotives, and electric locomotives. For at least the next ten years, Siemens is expecting to produce 4 locomotives per month. The average time to build one locomotive is 6,000 hours.

Investments were made in the following areas to allow the flexibility to produce a wider array of products and to meet an increase in customer demand:

- New equipment including Robotic Weld Machines (10/14), MIG Welding Machines (1/15) and Welding Templates (6/15)
- Plant expansion to prepare for production of diesel electric locomotives. The expansion includes two new buildings totaling an additional 165,000 square feet of production area
- Upgrade of current facility’s welding, machining and painting departments to support the production of newly awarded contracts
- Purchase of adjacent 22 acre property to allow for the construction of a high-speed rail center (construction planned for 2017)

All trainees will receive job specific manufacturing training in the areas of Equipment Operation, Welding, Machining and Measurement, Electrical Sub Assembly, Final Assembly, Finishing, and Warehousing. This training includes topics that are entirely new processes to Siemens. The Sacramento facility has new production lines and will begin producing diesel-electric locomotives and stainless steel passenger coaches. The welders will perform stainless steel welds on the passenger coaches, the first of their kind in the United States.

Siemens will also train staff in the area of Lean Manufacturing to improve efficiencies, quality and to reduce waste. In addition, many of the current production managers were promoted from within, and Siemens has plans to provide formal management skills training to foster an environment of high performance and high production.

**Retrainees - Job Creation**

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

Siemens has committed to hiring 242 new employees (Job Number 2) and ten Veterans (Job Number 3). 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.

Siemens was recently awarded production contracts with All Aboard Florida, San Francisco Municipal Transportation Agency, the City of Calgary, Illinois Department of Transportation, and Amtrak. To support the demand of customers, an extensive workforce headcount plan has been developed for the next three years, which takes into account all of the training times and
estimated production requirements. Siemens has expanded their production facilities and will be bringing on many new employees to staff the new production lines.

To meet staffing needs, Siemens has been working in collaboration with Sierra College, Yuba College, Consumnes River College, and American River College to train and create a pipeline of welding talent. The welder trainees will complete a training curriculum and welding qualification testing at the college facilities. The welding training curriculum was developed by Siemens and will be instituted by the colleges. To support the training at the colleges, Siemens provided the colleges with funding and materials for training. Once the students have completed the coursework successfully, Siemens may offer the student a temporary-to-permanent position.

**Veterans**

The Panel has established a higher reimbursement rate and other incentives for training California veterans.

Siemens is working in collaboration with the Sacramento Employment and Training Agency (SETA), (http://sacramentoworks.org/job-seekers/welding/), where a pathways education program has been developed to create an optional pipeline of welders. SETA has partnered with Consumnes River College to offer an eight week welding boot camp, which will provide veterans with the technical welding skills needed to be employed at Siemens. After completion of the boot camp, veterans will be enrolled in a Capstone course at a participating local college to further expand their welding knowledge. Both the boot camp and Capstone training programs are Non-ETP funded. ETP funded training will begin once the trainee has completed the Capstone training and is selected by Siemens to work in a Temporary-to-Permanent status. SETA will be solely focusing on the training and placement of California Veterans.

Orion International, the nation’s leading provider of Best-in-Class-Military Talent Programs, is also working with Siemens to provide full time employment for service men and women after the completion of their active service. Veterans who are exiting military service may be hired directly by Siemens if the veteran is able to pass a pre-employment quality test.

- **Curriculum**

  At least 50% of total training in Job Number 3 must consist of vocational skills training. The remaining hours may consist of literacy training.

**PROJECT DETAILS**

**Training Plan**

**Business Skills** (5%): Training will be delivered to all occupations. Siemens business skills training will improve communication and employee relation skills internally between staff members and departments. Training topics will include Understanding the Process of Conflict, High Impact Communication: Shaping your Message, Communicating – Connecting to People, Supporting your Team Members through Change, and How to Run Meetings Efficiently. All business skills training will be delivered by the Computer-based training delivery method.

**Continuous Improvement** (15%): Training will be delivered to all occupations to meet Siemens adopted Defects per Unit program’s goals. In addition, Siemens continuous improvement training will increase efficiency, safety and quality throughout all departments. Training topics will include Problem Solving and Decision Making, Kaizen, 5S, Lean
Manufacturing, Standardized Work, Product Quality and Control, Root Cause Analysis, and Creating Continuous Flow.

**Manufacturing Skills (60%)**: Training will be delivered to all occupations, focused on the production of Siemens rolling stock. Siemens has developed a structured training plan for incumbent and job creation staff to expand the trainee’s skill set. Staff will receive job specific production training in the areas of General Manufacturing Skills, Equipment and Safety, Welding, Machining and Measurement, Electrical Sub Assembly, Final Assembly, Finishing, Warehousing, and Production Planning. Training topics will include Tool Selection and Usage, Forklift Driving, Blueprint Reading, Welding Metallurgy, Gas Tungsten Arc Welding, Flux Core Arc Welding, Welding Equipment Maintenance, Principles of CNC Programming, Paint Processes, Adhesive Materials, and Sand Blasting.

**Management Skills (5%)**: Training will be offered to Managers to improve management skills. Many of Siemens production managers have been promoted from within with little to no formal management training. This training will address management’s lack of experience and knowledge to improve teamwork, motivation, performance management skills, communication skills, and leadership skills. Training topics will include Employee Engagement, Coaching Skills, Establishing Performance Objectives, Developmental Planning, Dynamic Leader, Developing High Performance Teams, and Key Management Skills.

**Computer Skills (5%)**: Job specific training will be delivered to all occupations to improve software skills. Training will focus on enterprise resource planning (ERP) software and materials addressing system to improve material control and performance. Computer Skills training topics will include JD Edwards Software, Materials Addressing System, and eSlic Software.

**Hazardous Materials (5%)**: Training will be delivered to all occupations; however, training will be job specific. Hazardous Materials training will provide staff with the skills necessary to work with and properly dispose of potentially hazardous materials. Training course topics will include Emergency Response Team Training, Hazardous Materials Handling, Hazardous Materials Storage, and Hazardous Materials Disposal.

**Literacy Skills (5%)**: Training may be delivered to any occupation. Literacy Skills training will focus on staff members that require improved understanding of the English language pertinent to job duties. Trainees will receive Vocational English as a Second Language including Basic Math, Reading and Comprehension Skills training.

**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 PL training. All PL training will have a trainer-to-trainee ratio of 1:1 and PL training may not exceed this ratio.

Siemens will utilize PL as a delivery method to deliver Manufacturing Skills training to Fitters/Welders, Straighteners, CNC Machinists, Equipment Operators, Certified Welding Inspectors, Assemblers, Blasters, Painters, Spacklers, Primers, and Robot Operators. Production is expected to be slowed by half and material waste will increase during training. PL training will supplement Class/Lab training to strengthen employees’ understanding of how to perform production manufacturing and equipment related tasks. At a cost of approximately $400,000, Siemens built a Welding Education Center where welds can be taught in a laboratory setting. Welders will be required to meet a qualification standard in laboratory training prior to
receiving PL training on the production floor. To build upon skills obtained in classroom training, other occupations will receive PL training for their specific job duties.

Incumbent Staff in Job Number 1 and Job Creation Staff in Job Numbers 2 and 3 will receive between 0-60 hours of PL training. PL trainers will observe, coach, and mentor the trainee as the trainee completes the production task. After a specified number of successful completions of the task, the trainer will determine that training has been completed and that the trainee is competent in the task.

**Computer-based Training (CBT)**

CBT is capped at 50% of total training hours per trainee. CBT will be provided to supplement Siemens’ curriculum, and for some training topics is a more convenient means of delivering basic training. Trainees in Job Numbers 1 – 3 will receive between 0-60 hours of CBT.

**Commitment to Training**

Siemens represents that ETP funds will not displace the existing financial commitment to training. The annual training budget for Siemens’ Sacramento facility ranges from approximately $500,000 to $700,000. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

- Training Infrastructure

Siemens is working in collaboration with local colleges and SETA to significantly increase their workforce. To promote welding training at the colleges, Siemens has financially supported the schools by providing funding and raw materials for laboratory training at a reduced cost. Internally, Siemens has upgraded their Welding Education Center and has three welding educators on staff dedicated to training incoming welders.

**Impact/Outcome**

Training will allow Siemens to meet production requirements for recently agreed upon production contracts. With the expansion of the Sacramento facility and training of its staff, Siemens will be able to maintain and increase market share within their industry.

**Temporary to Permanent Hiring**

Trainees in Job Number 2 and Job Number 3 come under Panel guidelines for “temporary-to-permanent” employment. Siemens has retained these employees through a temporary agency, with the intention of hiring them into full-time, permanent positions after training.

These trainees must be determined eligible to participate in ETP-funded training before the start of training, while on payroll with the temporary agency. However, the retention and post-retention wage requirements cannot be satisfied until after they have been hired by Siemens. Until then, Siemens will not receive progress payments.

For the duration of Siemens’ hiring phase all temporary-to-permanent staff will be placed by the staffing company Superior Group. Superior Group has a full time recruiter and project manager on-site at Siemens. In addition, Superior Group’s location in Sacramento will assist in the recruitment of and placement of temporary-to-permanent staff.
RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET09-0500</td>
<td>Sacramento</td>
<td>05/01/09 – 04/30/11</td>
<td>$74,880</td>
<td>$23,413 (31%)</td>
</tr>
</tbody>
</table>

ET09-0500 – Siemens found it extremely challenging to locate eligible candidates to be hired into full-time welder positions at the Sacramento facility. To be hired as a welder at Siemens, applicants must be able to pass a weld quality test. Additionally, Siemens utilizes multiple welds, which are more advanced and are not taught in welding schools. The Sacramento area did not have a sufficient supply of qualified welders to fill all open positions at Siemens in the ET09-0500 contract.

For this training proposal, Siemens is confident that all funding requested will be fully utilized. An extensive workforce headcount plan has been developed for the next three years and training time has been built into the facility’s work plans. To ensure that there are a sufficient number of candidates to fill the expected 60 new welder positions, Siemens has partnered with multiple local colleges, SETA and Orion International, to provide a pipeline of welding candidates. Candidates will receive training at the local colleges on a curriculum designed by Siemens prior to taking the quality welding test. The eight week training course will prepare welders to meet Siemens production quality standards. To ensure welders are retained after being brought in on a temp-to-perm status, Siemens has invested in a Welding Education Center (WEC). The WEC will be fully staffed by internal weld educators to bring temp-to-perm staff to a satisfactory level of quality.

By the end of August 2015, 27 candidates completed the eight week welding training course, of which 15 candidates have been designated as high performers. The high performers will be the first batch of welders to be brought into Siemens in a temp-to-perm status. The next welding training course at the participating colleges will be completed in December 2015.

All other job creation occupations are not required to complete a pre-employment training class; however, detailed training will be delivered to these trainees once hired. To meet production needs Siemens will hire an estimated 192 production employees in occupations other than welders.

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:

MANUFACTURING SKILLS

General Manufacturing Skills

- Work Orders and Work Order Numbering
- Work Packages
- Identifying Drawings
- Non-conforming Material (red-tag)
- Autocrib Usage
- Calibration System
- Print Reading
- Bills or Materials and Part Numbers
- Measuring Devices
- Measurement and Measuring Devices
- Torque
- Drill and Tap
- Recycling
- Tool Selection and Usage
- Understanding Takt Time

Equipment & Safety Training

- Forklift Driving
- Crane Operation
- Fall Prevention / Protection
- Respirator Training and Fitting
- Pallet Jack Operation
- Aerial Lift Operation
- Rigging
- Kumbruch
- Electrical Safety
- Chop Saw
- Table Saw
- Lockout / Tag out

Welding

- Welding Module 1
- Welding Module 2
- Blueprint Reading
- Weld Symbols
- Welding Procedure Specifications (WPS)
- Measurement Methods and Equipment
- Layout Techniques
- Weld Rework Techniques
- TIG Welding
- Weld Joint Configurations
Fundamentals of Welding Techniques
Mathematics for Welding Techniques
Introduction to Welding
Introduction to Welding Metallurgy
Welding Inspection
Shielded Metal Arc 1 Welding (stick)
Shielded Metal Arc Welding 2 (stick)
Advanced Pipe Welding in Shielded Metal Arc
Gas Tungsten Arc Welding
Gas Tungsten Arc Welding – Pipe
Flux Core Arc Welding
Symbol Reading, Layout and Fabrication
Welding Equipment Maintenance
Code Welding
PAPR Helmet
Stainless Steel Welding
Metric Tolerancing
Euronorm
American Welding Society (AWS) Certification

Machining and Measurement

Faro Arm Measurement
Principles of CNC Programming
Clamping
Laser Tracking
Dual Arm CMM
Fundamentals of Wheel Pressing

Electrical Sub Assembly

Read and Interpret Engineering Electrical Drawings
Read and Interpret Engineering Wire Lists
Use of Metric Measurement Devices
Use and Calibration of Torque Measurement Tools
Identification of Wire Types
Wire Stripping Techniques and Common Tools
Wire Crimping Techniques and Common Tools
Installation of Cable Clamps and Cable Ties
Harness Boards
Electrical Assembly Methods

Final Assembly

Read and Interpret Engineering Assembly Drawings
Use of Metric Measuring Devices
Use an Calibration of Torque Measurement Tools
Identification of Hardware Types
Proper Hardware Applications
Identification and Use of Common Non-Powered Hand Tools
Drilling Techniques
Proper Use of Tapes and Dies
Assembly Methods
Finishing

- Adhesion / Surface Prep Prior to Paint
- Paint Materials
- Paint Processes
- Paint Equipment
- Paint Work Instructions
- Paint Quality Assurance
- Adhesion / Surface Prep Prior to Bonding
- Adhesive Materials
- Adhesive Processes
- Adhesive Equipment
- Adhesive Work Instructions
- Adhesive Quality Assurance
- Sand Blasting Equipment, Set-up, and Processing Parameters

Warehouse

- Receive and Stock Material
- Pick Lists and Work Orders
- Cycle Counting
- Stock Purge
- Material Delivery Zones

Production Planners & Production Controllers

- Manufacturing BOM Creation
- Creating, Opening, and Closing Work Orders
- Material Status Investigation

COMPUTER SKILLS

- eSlic Software
- JDE Software
- Materials Addressing System

CONTINUOUS IMPROVEMENT

- Problem Solving and Decision Making
- Kaizen Training
- 5S
- Lean Manufacturing
- Lean Manufacturing Methodology
- Understanding Waste
- Value Stream Mapping
- Standardized Work
- Lean Sigma Yellow Belt
- Lean Sigma Green Belt
- Statistics with Minitab
- Product Quality and Control
- Key Performance Indicators
Creating Continuous Flow
Kanban Control
5 Why’s and Root Cause Analysis

HAZARDOUS MATERIALS

Emergency Response Team Training
Hazardous Materials Handling, Labeling, Storage and Disposal
Completing Material Safety Data Sheets (MSDS)
Hazardous Materials Clean-up

MANAGEMENT SKILLS (Managers Only)

Employee Engagement
Coaching Skills
Establishing Performance Objectives
Developmental Planning
Dynamic Leader
Developing High Performance Teams
Key Management Skills

OSHA 10/30 (Certified OSHA Instructor)

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

LITERACY SKILLS

Vocational English as a Second Language
Basic Math, Reading and Comprehension 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).

Productive Lab Hours

0-60

MANUFACTURING SKILLS (1:1 Trainer-to-Trainee Ratio)

Light Rail Carshell Welding
Locomotive Carshell Welding
Coach Welding
Bogie Welding
Blasting
Painting
Cladding
Bonding
Spackling
Electrical Sub Assembly
Light Rail Final Assembly
Locomotive Final Assembly
Coach Final Assembly
Bogie Final Assembly
DITMCO Testing
Static Testing
Dynamic Testing

CBT Hours

0-60

BUSINESS SKILLS

- How to Run Meetings Efficiently (30 minutes)
- Leading a Brainstorming Session (30 minutes)
- Developing Team Performance (30 minutes)
- Successfully Running a Training Course (45 minutes)
- Understanding the Process of Conflict (45 minutes)
- Monitoring Delegation (30 minutes)
- High-Impact Communication: Shaping Your Message (30 minutes)
- Communicating – Connecting to People (30 minutes)
- How to be Assertive in Difficult Situations (30 minutes)
- Day-to-day Management of a Planned Change (30 minutes)
- Supporting your Team Members through Change (30 minutes)

MANAGEMENT SKILLS

- A Basic Grounding in Effective People Management (60 minutes)
- Using Different Management Styles (30 minutes)

MANUFACTURING SKILLS

- Hot Work / Welding Safety (25 minutes)
- Shop Safety (30 minutes)
- Personal Protective Equipment (40 minutes)
- Hearing Conservation (30 minutes)
- Back Injury Prevention (25 minutes)

CONTINUOUS IMPROVEMENT

- Identifying the Root Cause of a Performance Issue (30 minutes)
- Lean Manufacturing Introduction (60 minutes)
- 5S Introduction (60 minutes)
- Standardization Work Introduction (60 minutes)
- DMAIC Problem Solving Introduction (60 minutes)

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10 (Requires completion of 10 hours)
- OSHA 30 (Requires completion of 30 hours)
Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery. CBT is capped at 50% of total training hours, per trainee excluding OSHA 10/30, HAZWOPER or HAZMAT. PL is capped at 60 hours per-trainee.
Training Proposal for:
Chaffey Community College District
Agreement Number: ET16-0196

Panel Meeting of: September 25, 2015
ETP Regional Office: North Hollywood Analyst: E. Fuzesi

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Industry Sector(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retraineepriority Rate SB &lt;100</td>
<td>Manufacturing Services</td>
</tr>
<tr>
<td>Medical Skills Training SET</td>
<td>Transportation/Logistics</td>
</tr>
<tr>
<td></td>
<td>Aerospace and Defense</td>
</tr>
<tr>
<td></td>
<td>Healthcare</td>
</tr>
<tr>
<td></td>
<td>Priority Industry: Yes No</td>
</tr>
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<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Bernardino, Riverside, Los Angeles, Orange, San Diego</td>
<td>Yes No</td>
</tr>
</tbody>
</table>

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

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

FUNDING DETAIL:

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$527,352</td>
<td>$36,465 8%</td>
<td>$563,817</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 50% of Total ETP Funding Required $697,536
# TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB&lt;100 Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Impr., Literacy Skills, HazMat, OSHA 10/30, Mgmnt. Skills, Mfg. Skills</td>
<td>120</td>
<td>8-200</td>
<td>$444</td>
<td>$15.07</td>
</tr>
<tr>
<td>2</td>
<td>Retraine Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Impr., Literacy Skills, HazMat, OSHA 10/30, Mgmnt. Skills, Mfg. Skills</td>
<td>50</td>
<td>8-200</td>
<td>$256</td>
<td>$15.07</td>
</tr>
<tr>
<td>3</td>
<td>Retraine SET Priority Rate</td>
<td>Medical Skills Didactic</td>
<td>316</td>
<td>8-200</td>
<td>$308</td>
<td>$20.55</td>
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<tr>
<td>4</td>
<td>Retraine SET Priority Rate</td>
<td>Medical Skills</td>
<td>50</td>
<td>8-200</td>
<td>$128</td>
<td>$27.40</td>
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<td>5</td>
<td>Retraine SET</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Impr., Literacy Skills, HazMat, OSHA 10/30</td>
<td>731</td>
<td>8-200</td>
<td>$539</td>
<td>$15.07</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** Job Number 1, 2 and 3: $15.07 in San Bernardino and Riverside Counties; $15.93 in San Diego County; $16.02 in Orange County; and $15.97 in Los Angeles County. Job Number 4: $20.55 statewide. Job Number 5: $27.40 statewide.

**Health Benefits:** ✗ Yes ☐ No  This is employer share of cost for healthcare premiums.

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

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

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Numbers 1-3:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Logistics Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial Electrical Technician</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturing Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 4:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Licensed Vocational Nurse (LVN)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registered Nurse (RN)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Therapist</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Job Number 5:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frontline Supervisor</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### INTRODUCTION

Chaffey Community College District (Chaffey) (www.chaffey.edu), founded in 1883, is a two-year public community college and is accredited by the Western Association of Schools and Colleges. Operating through its own Workforce Training Institute (Institute), Chaffey has three campuses offering credit courses in Rancho Cucamonga, Fontana, and Chino; two off-site training centers in Chino. Chaffey is eligible for ETP funding as a public training agency. This is Chaffey’s sixth training proposal for ETP funding.

Chaffey serves participating employers primarily in San Bernardino, Riverside, Los Angeles, and Orange counties, and maintains relationships with manufacturing and logistic industry groups. Chaffey also collaborates with local chamber of commerce boards, workforce preparation programs, economic development departments, the County of San Bernardino, the Workforce Development Board of San Bernardino County, business advisory boards, and non-profit agencies to further promote economic growth within the Inland Empire. Chaffey’s involvement with these groups allows it to stay abreast of current and changing business needs in multiple industries.

This proposal is targeted to train 1,267 incumbent workers in large and small, priority and non-priority businesses with out-of-state competition in manufacturing, aerospace, logistics, distribution, electrical, and service industries. Training will also be provided to healthcare, and other employers without out-of-state competition under the Panel’s SET program. The majority of the participating employers will be located in San Bernardino and Riverside Counties, but training will be extended to companies in surrounding areas as needed. The core group of
employers represents over 100% of the planned trainees. They represent various sized businesses from the aforementioned industries.

**Union Support**

Included in the core group of employers, trainees are represented by two collective bargaining units. The letters from these unions supporting the training have been submitted to ETP.

**PROJECT DETAILS**

Chaffey’s staff conducted several assessments with business representatives to identify and quantify regional respective training needs. In the manufacturing industry, organizations tend to hire entry-level workers who require a good deal of training for highly technical positions. These trainees need a substantial amount of training before they can perform their jobs without assistance. According to Chaffey, the participating employers prefer to promote from within, which necessitates additional training to help the transition into new positions.

In addition, in recent years, small businesses have experienced a tremendous amount of growth in business demand, and anticipate this trend to increase exponentially over the next two years. At the same time, many small businesses lack computer, literacy, and business skills for their front-line workers. As such, small businesses are seeking to train their entry level, lead, and middle managers to be able to handle the anticipated production growth and to bridge the skills gap.

Overall, the primary needs identified are improving job-specific skills to meet productivity goals and client demands, and to develop electrical/mechanical skills for workers for manufacturing and logistics. Employers are also looking for ways to develop leadership skills for frontline workers.

ETP-funded training will target specific technical, computer, literacy, quality, leadership, and business skills requested by participating employers. Training will be customized to suit the needs of each employer, where 50% of it is anticipated to take place at employers’ worksites, and 50% is anticipated to be center-based at college facilities. All trainers are aptly qualified by education and experience.

**Training Plan**

**Business Skills** (15%) – Training will provide Administrative Staff, Logistics Staff, Maintenance Staff, Manufacturing Staff, Production Staff, Operators, Frontline Supervisors, and Managers/Supervisors the ability to generate business and financial reports, improve written and verbal communications, increase product knowledge, build leadership skills, and improve quality customer service.

**Commercial Skills** (15%) – Training for Logistics Staff, Industrial Electrical Technician, Maintenance Staff, Manufacturing Staff, Operators, Production Staff, Frontline Supervisors, and Managers/Supervisors will be customized to meet the individual needs of each business. Training will cover the automotive, HVAC and electrical industries.

**Continuous Improvement** (20%) – Training is designed to help Administrative Staff, Logistics Staff, Maintenance Staff, Manufacturing Staff, Operators, Production Staff, and Frontline Supervisors, Managers/Supervisors reach business and production goals, increase productivity and product quality, develop teamwork strategies to enhance performance, and improve business processes.
Computer Skills (10%) – Training for Administrative Staff, Logistics Staff, Maintenance Staff, Manufacturing Staff, Operators, Production Staff, Frontline Supervisors, and Managers/Supervisors will be customized to meet the individual needs of each business. In addition, training will be provided to improve basic computer literacy skills of frontline workers.

Manufacturing Skills (5%) – Training for Maintenance Staff, Manufacturing Staff, Operators, Production Staff, and Managers/Supervisors is designed to improve productivity, efficiency, quality and reduce waste. These skills will help improve employee proficiency in equipment operation, assembly procedures, and warehousing, as well as empower frontline workers to identify and resolve production problems in order to improve processes.

Management Skills (10%) – Training will provide Managers/Supervisors with the skills they need to coach teams and individuals, improve team and individual performance, and track process improvement.

Literacy Skills (5%) – Training for Administrative Staff, Logistics Staff, Maintenance Staff, Manufacturing Staff, Operators, and Production Staff will include basic math and VESL training and will be offered primarily to help staff improve job skills, overall performance, and communication with supervisors and co-workers. Training will be customized based on individual trainee needs and will not exceed 45% of the total number of hours per trainee.

Medical Skills – Didactic Training (15%) – Training will be offered to LVNs, RNs, and Therapists to increase skills in Advanced Cardiac Care, Concentrated Rhythm Strips, Ventilator Training, Telemetry Technician Monitoring, Physical Assessment, and other topics identified by the client.

Certified Safety Training

OSHA 10/30 (3%) – Training will be provided to Logistics Staff, Maintenance Staff, Manufacturing Staff, Operators, Production Staff, Frontline Supervisors, and Managers/Supervisors. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom training for frontline workers and 30 hours for frontline supervisors. The coursework is geared to construction and manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Hazardous Materials (HAZMAT) (2%) – Training will provide Manufacturing Staff, Operators, Production Staff, and Frontline Supervisors with the skills needed to safely handle and dispose of hazardous materials on the jobsite. This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and will be delivered by classroom training. Completion of the training results in a certificate that expands employment opportunities.

Impact/Outcome

The proposed comprehensive training programs will help companies find innovative ways to meet and exceed their goals, increase the skills of their workforce and improve effectiveness, efficiency, and strategic performance. This, in turn, will help organizations grow and remain competitive in a global marketplace. ETP funds will facilitate employer access to training through a combination of customized center-based and on-site courses. The skills employees
gain through ETP-funded training will allow entry level workers to remain employed while other employees are promoted from within the Company.

Chaffey assesses results through successful completion of the assigned training, mastery of subject matter as documented through evaluations and trainer assessments, utilization of the skills learned as the trainee returns to the workplace, and the successful completion of the 90-day retention period as defined by ETP.

Every trainee receives a certificate of professional development documenting the training type and number of hours completed. Six Sigma Green and Black Belt projects are certified by project and exam by the Six Sigma Master Black Belt trainer. Medical Skills trainings are provided certification through assessment by the subject matter expert.

**Commitment to Training**

Chaffey represents that ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The training needs expressed above are ones that employers are unable to meet with their existing, in house training resources. Typical employer-provided and covered training include new-hire orientation or onboarding, job specific training, job shadowing, harassment preventions, diversity, and state and federally mandated training courses.

➢ Training Infrastructure

This program will be administered in-house by Chaffey. One part-time and two full-time employees will be responsible for marketing, recruitment, needs assessment, coordinating and scheduling training, and complying with ETP recordkeeping requirements. The infrastructure of a community college setting allows Chaffey to facilitate effective and efficient business practices.

**Apprenticeship Evaluation**

The curriculum for the Industrial Electrical Technicians/Maintenance Mechanics has been reviewed and compared with Electrical Apprenticeship programs offered through Joint Apprenticeship Training Committees in the Inland Empire (Riverside and San Bernardino counties). The curriculum does not duplicate courses offered through an established union apprenticeship program offered in these counties.

**Marketing and Support Costs**

Chaffey markets and recruits employers via local Chambers of Commerce, HR Network Groups, local Workforce Development Departments, the Inland Empire Desert Regional Consortium, through the Manufacturer’s Council of the Inland Empire meetings, and email blasts/phone calls to their employer database as well as individual meetings with clients. Additionally, representatives of the College regularly reside on workforce investment boards, business advisory and non-profit agency boards to further promote economic growth within the Inland Empire.

One full-time employee is dedicated to recruiting employers, while many referrals come from existing clients, various industry groups, consortiums, and councils in which Chaffey participates. Many of these clients have received training in the past, and maintain regular contact regarding new and advanced educational opportunities for their workers. Chaffey also
offers a continual calendar of center based training requested by industry to multiple employers year-round. Small employers have easy access to training, since for the most part they are unable to fill an entire class with only their employees. Additionally, customized, on-site training is added to the schedule as the need and interest arises.

Chaffey is requesting 8% support costs to cover the cost of recruiting additional participating employers, assessing their specific training needs, developing job-specific curricula and training schedules, and conducting necessary follow-up during retention. This will be an ongoing activity throughout the duration of the Agreement. Staff recommends the 8% Support Costs.

Special Employment Training

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period (Job Number 5). For priority industries such as healthcare, the modified statewide average hourly wage is $20.55 for trainees in Job number 4.

SET Frontline Worker

SET participating employers may use several job classifications with a “Supervisor” or “Manager” in the title. These frontline supervisors do not have the ability to hire or fire, and spend the majority of their work hours as frontline workers performing the same responsibilities as other employees in their occupation. Based on the nature and scope of their job duties, these employees are not exempt from overtime compensation. Therefore, they meet the Panel’s definition of frontline workers. As such, Frontline Supervisors will participate in training to be able to develop work teams and effectively coach and mentor team members.

Substantial Contribution

Certain repeat contractors with payment earned in excess of $250,000 per facility within the past five years will be subject to substantial contribution. Accordingly, reimbursement for trainees at these facilities will be reduced by 15% to reflect the Company’s Substantial Contribution to the cost of training. If the repeat contractor with payment earned in excess of $250,000 had a former Substantial Contribution at the 15% level, reimbursement for trainees at this facility will be reduced by 30%.

Tuition Reimbursement

In accordance with ETP Regulations, Chaffey represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.
ACTIVE PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
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</thead>
<tbody>
<tr>
<td>ET14-0170</td>
<td>$1,021,010</td>
<td>11/1/13-10/31/15</td>
<td>630</td>
<td>482</td>
<td>177</td>
</tr>
</tbody>
</table>

Based on ETP Systems, Chaffey’s reimbursable hours have been tracked for potential earnings of $592,186 (58% of approved amount). The Contractor projects final earnings of 58% if all trainees are eligible for reimbursement. The current proposal has been “right-sized” against this amount.

Chaffey’s level of performance was partly due to a leadership transition and partly to a shift in the organizational structure of the department soon after the approval of the project. As a result, minimal training occurred during the first six months of the contract. New staff’s learning curve in marketing and project administration posed additional delays in performance.

Chaffey now has a dedicated and experienced team in place, and established the following processes to ensure success:

- Improved marketing efforts include renewed connections with the local municipal economic development departments, chambers of commerce, and business service representatives.
- Chaffey revamped its website to make it more user friendly for employers and potential trainees.
- Chaffey created an internal guide for employers to help them succeed in the project.
- Chaffey was recently awarded a federal grant to develop a regional training center. This center is currently being constructed at the California Steel Industries in Fontana (a participating employers’ site). This “Industrial & Technical Learning Center of the Inland Empire” is anticipated to be one of the training sites for Chaffey’s new ETP contract. With the attraction of this new center and the resources of this grant, Chaffey anticipates both marketing and training enrollments to increase in the upcoming two years and beyond.
- Chaffey has recruited many new participating employers for the proposed Contract who are eager to benefit from training, along with previous employers who are also ready to send new trainees.
- Chaffey has redesigned the staff positions which support ETP to ensure that full-time, permanent staff is dedicated to the program, which offers stability and lessens the chances of staff turnover.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>Payment Earned %</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0116</td>
<td>Rancho Cucamonga</td>
<td>8/27/12 – 8/26/14</td>
<td>$650,597</td>
<td>$647,258</td>
<td>(99%)</td>
</tr>
<tr>
<td>ET11-0248</td>
<td>Rancho Cucamonga</td>
<td>6/1/11 – 5/31/13</td>
<td>$394,807</td>
<td>$394,269</td>
<td>(99%)</td>
</tr>
<tr>
<td>ET10-0234</td>
<td>Rancho Cucamonga</td>
<td>9/28/09 – 9/27/11</td>
<td>$345,700</td>
<td>$344,357</td>
<td>(99%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

N/A
ADMINISTRATIVE SERVICES
N/A

TRAINING VENDORS
To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200, Job numbers 1-3 and 5

BUSINESS SKILLS
• Behavioral Interviewing
• Business Impact
• Communication Skills
• Conflict Management
• Customer Service
• Decision-Making
• Finance for the Non-Financial Manager
• Getting Business Results
• Group Effectiveness
• Interpersonal Skills
• Inventory Control
• Negotiation
• Personal Effectiveness
• Product Knowledge
• Project Management
• Scheduling, Budgeting, and Cost Control
• Telephone Skills
• Time Management

COMMERCIAL SKILLS
• AC & DC Variable Speed Drives
• Analog Communications
• Automotive Repair
• Aviation Mechanical Skills/Aircraft Maintenance
• Basic/Intermediate PLCs
• Cable Networking the Physical Layer
• Electro-Pneumatics I & II
• Fiber Optic Cabling the Physical Layer
• HVAC EPA 608 & 609
• Hydraulics I & II
• Industrial Electrical Safety Training
• Instrumentation & Process Controls I & II
• Intermediate – Advanced Electricity & Motor Operation for Manufacturing Technicians
• Semiconductor Devices
• Transistor Amplifier Circuits
• Transistor Feedback Circuits
• Transistor Power Amplifiers
• Troubleshooting Electrical Control Circuits

COMPUTER SKILLS
• Budgeting
• Company-Specific Software
• Computer Networking
• Cost Tracking
• Document Control
• Inventory Control
• Managing E-mail
• Manufacturing Resource Planning/Material Resource Planning
• Microsoft Office (Intermediate & Advanced)
• MS Project
• Payroll
• Purchase Order Tracking
• Shipping Solutions or Related Logistic Software
• World-Wide Web

CONTINUOUS IMPROVEMENT
• 5S
• Basic Logistics Standard Practices
• Certified Logistics Associate
• Certified Logistics Technician
• Change Management
• Coaching/Motivating Employees
• Communicating Effectively
• Communicating Effectively with ELL (English Language Learners)
• Cost and Analysis
• Cost Reduction
• Interaction Management
• Inventory Control
• Leadership Skills for Frontline Workers
• Lean Manufacturing/Operations
• Monitoring
• Problem Solving
• Process Corrective Action
• Quality Technician Certification
• Resource Management Certification
• Scheduling and Planning
• Six Sigma:
  o Green Belt Certification
  o Yellow Belt Certification
  o Black Belt Certification
• Strategic Planning
• Supervisor/Lead Role
• Supply Chain Elements
• Teambuilding
• Time Studies & Line Balancing
• Total Quality Management (TQM)
• Understanding Work Group Dynamics

HAZARDOUS MATERIALS
• HazMat

LITERACY SKILLS
• Basic Math
• Language Comprehension
• Reading Letters and Reports
• Shop/Workplace Math
• Understanding Numbering Systems
• Understanding Verbal Direction and Instruction
• Workplace English (Vocational English – VESL)
• Writing Letters and Reports

Must be job related and hours are capped at 45% of a trainee’s total training hours.

**MANAGEMENT SKILLS (Management Trainees Only)**
• Conflict Management for Managers
• Effective Leadership/Supervisory & Management Skills
• Essential Interviewing Skills
• Leadership for Managers
• Managing a High Performance Workplace
• Planning
• Project Management for Managers

**MANUFACTURING SKILLS**
• Assembly Procedures
• Blueprint Reading
• CNC Machining
• Cross-Functional Production/Equipment Skills
• Equipment Operation
• Food Processing
• Geometric Dimensioning & Tolerancing
• Inspection Techniques
• Manufacturing Practices
• Production Operation
• Warehousing

**OSHA 10/30 (Certified OSHA Instructor)**
• OSHA 10 (requires 10hr. completion)
• OSHA 30 (requires 30hr. completion)

**Class/Lab Hours**
8-200, Job Number 4

**MEDICAL SKILLS - DIDACTIC**
• Advanced Cardiac Care
• American Heart Association Advanced Cardiac Life Support Certification
• Concentrated Rhythm Strips
• IV Certification and Blood Withdrawal
• Physical Assessment Series
• Telemetry Technician Monitoring Skills
• Ventilator Training

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
Participating Employers in Retraineef
Multiple Employer Contracts

Contractor’s Name: Chaffey College  
CCG No.: ET16-0196
Reference No: 15-0266  
Page 1 of 6

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Able Industrial Products
Address: 2006 S. Baker Avenue -
City, State, Zip: Ontario, CA 91761-7709
Collective Bargaining Agreement(s): n/a
Estimated # of employees to be retrained under this Agreement: 20
Total # of full-time company employees worldwide: 75
Total # of full-time company employees in California: 43

Company: Ardent Mills, LLC
Address: 19684 Cajon Blvd.
City, State, Zip: San Bernardino, CA 92407
Collective Bargaining Agreement(s): n/a
Estimated # of employees to be retrained under this Agreement: 2
Total # of full-time company employees worldwide: 2400
Total # of full-time company employees in California: 125

Company: California Steel Industries
Address: 1 California Way
City, State, Zip: Fontana, CA 92335
Collective Bargaining Agreement(s): n/a
Estimated # of employees to be retrained under this Agreement: 60
Total # of full-time company employees worldwide: 980
Total # of full-time company employees in California: 980

Company: Closet Maid
Address: 5150 Edison Ave.
City, State, Zip: Chino, Ca 91719
Collective Bargaining Agreement(s): n/a
Estimated # of employees to be retrained under this Agreement: 50
Total # of full-time company employees worldwide: 1676
Total # of full-time company employees in California: 117
<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s)</th>
<th>Estimated # of employees to be retrained under this Agreement</th>
<th>Total # of full-time company employees worldwide</th>
<th>Total # of full-time company employees in California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crown Paper Converting</td>
<td>1380 S Bon View Ave.</td>
<td>Ontario, CA 91761</td>
<td>n/a</td>
<td>15</td>
<td>40</td>
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</tr>
<tr>
<td>DPI Specialty Foods</td>
<td>601 Rockefeller Ave.</td>
<td>Ontario, CA 91761</td>
<td>n/a</td>
<td>50</td>
<td>1685</td>
<td>640</td>
</tr>
<tr>
<td>Em El Inc.</td>
<td>13891 Oaks Ave.</td>
<td>Chino, CA 91710</td>
<td>n/a</td>
<td>15</td>
<td>15</td>
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<tr>
<td>FV USA, LLC</td>
<td>1560 Sierra Ridge Dr.</td>
<td>Riverside, CA 92507</td>
<td>n/a</td>
<td>5</td>
<td>3500</td>
<td>30</td>
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<tr>
<td>Company: Ivar’s Cabinet Shop, Inc.</td>
<td>Address: 2314 E. Locust Ct.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-----------------------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>City, State, Zip: Ontario, CA 91761</td>
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<tr>
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<td></td>
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</tr>
<tr>
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<td></td>
</tr>
<tr>
<td>Total # of full-time company employees worldwide: 70</td>
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<tr>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Company: Kern Engineering &amp; Manufacturing Corp.</th>
<th>Address: 13912 Mountain Ave.</th>
</tr>
</thead>
<tbody>
<tr>
<td>City, State, Zip: Chino, CA 91710</td>
<td></td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s): n/a</td>
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<tr>
<td>Estimated # of employees to be retrained under this Agreement: 15</td>
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<tr>
<td>Total # of full-time company employees worldwide: 55</td>
<td></td>
</tr>
<tr>
<td>Total # of full-time company employees in California: 55</td>
<td></td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Company: Northrop Grumman Technical Services</th>
<th>Address: PO Box 11159</th>
</tr>
</thead>
<tbody>
<tr>
<td>City, State, Zip: Ft. Irwin, CA 92310</td>
<td></td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s): Teamsters 160</td>
<td></td>
</tr>
<tr>
<td>Estimated # of employees to be retrained under this Agreement: 400</td>
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<tr>
<td>Total # of full-time company employees worldwide: 68000</td>
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<tr>
<td>Total # of full-time company employees in California: 5000</td>
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<table>
<thead>
<tr>
<th>Company: OHL</th>
<th>Address: 13277 San Bernardino Ave.</th>
</tr>
</thead>
<tbody>
<tr>
<td>City, State, Zip: Fontana, CA 92335</td>
<td></td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s): n/a</td>
<td></td>
</tr>
<tr>
<td>Estimated # of employees to be retrained under this Agreement: 42</td>
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<tr>
<td>Total # of full-time company employees worldwide: 7000</td>
<td></td>
</tr>
<tr>
<td>Total # of full-time company employees in California: 700</td>
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</table>
## Participating Employers in Retraining
### Multiple Employer Contracts

<table>
<thead>
<tr>
<th>Contractor’s Name: Chaffey College</th>
<th>CCG No.: ET16-0196</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No: 15-0266</td>
<td>Page 4 of 6</td>
</tr>
</tbody>
</table>

**PRINT OR TYPE IN ALPHABETICAL ORDER**

<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip:</th>
<th>Collective Bargaining Agreement(s):</th>
<th>Estimated # of employees to be retrained under this Agreement:</th>
<th>Total # of full-time company employees worldwide:</th>
<th>Total # of full-time company employees in California:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providence Healthcare Inland Empire</td>
<td>800 East Fifth St.</td>
<td>Ontario, CA 91760</td>
<td>n/a</td>
<td>400</td>
<td>2336</td>
<td>800</td>
</tr>
<tr>
<td>Riverside Cement Co.</td>
<td>19409 National Trails Highway</td>
<td>Oro Grande, CA 92368</td>
<td>n/a</td>
<td>15</td>
<td>1674</td>
<td>187</td>
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<tr>
<td>Sears Holding Corp.</td>
<td>14650 Miller Ave.</td>
<td>Fontana, CA 92336</td>
<td>n/a</td>
<td>75</td>
<td>6000</td>
<td>600</td>
</tr>
<tr>
<td>Sport Chalet</td>
<td>2285 S. Ponderosa Ave.</td>
<td>Ontario, CA 91761</td>
<td>n/a</td>
<td>100</td>
<td>3000</td>
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*ETP 100B (1/09)*
<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s)</th>
<th>Estimated # of employees to be retrained under this Agreement</th>
<th>Total # of full-time company employees worldwide</th>
<th>Total # of full-time company employees in California</th>
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</thead>
<tbody>
<tr>
<td>Teamwork Packaging (Ocean Blue)</td>
<td>494 E. Commercial Rd.</td>
<td>San Bernardino, CA 92408</td>
<td>n/a</td>
<td>2</td>
<td>25</td>
<td>25</td>
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<tr>
<td>Telamon Corp.</td>
<td>4411 Schaefer Ave.</td>
<td>Chino, CA 91710</td>
<td>n/a</td>
<td>40</td>
<td>624</td>
<td>80</td>
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<tr>
<td>Thermal Dynamics</td>
<td>4850 E. Airport Dr.</td>
<td>Ontario, CA 91761</td>
<td>SMWU 170</td>
<td>25</td>
<td>100</td>
<td>85</td>
</tr>
<tr>
<td>TST, Inc.</td>
<td>13428 Benson Ave.</td>
<td>Chino, CA 91710</td>
<td>n/a</td>
<td>30</td>
<td>350</td>
<td>260</td>
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</table>
**Participating Employers in Retrainees**

**Multiple Employer Contracts**

<table>
<thead>
<tr>
<th>Contractor's Name:</th>
<th>Chaffey College</th>
<th>CCG No.:</th>
<th>ET16-0196</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference No.:</td>
<td>15-0266</td>
<td>Page:</td>
<td>6 of 6</td>
</tr>
</tbody>
</table>

**PRINT OR TYPE IN ALPHABETICAL ORDER**

<table>
<thead>
<tr>
<th>Company:</th>
<th>Universal Container and Packaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address:</td>
<td>14880 Monte Vista Ave.</td>
</tr>
<tr>
<td>City, State, Zip:</td>
<td>Chino, CA 91710</td>
</tr>
<tr>
<td>Collective Bargaining Agreement(s):</td>
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<td>Estimated # of employees to be retrained under this Agreement:</td>
<td>15</td>
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<tr>
<td>Total # of full-time company employees worldwide:</td>
<td>20</td>
</tr>
<tr>
<td>Total # of full-time company employees in California:</td>
<td>20</td>
</tr>
</tbody>
</table>
July 1, 2015

State of California ETP.

Dear State of California ETP:

We are aware that employees of Thermal Dynamics will receive training funded through the Employment Training Panel (ETP) and we concur with the proposed training.

We feel that the ETP-funded training will assist employees of Thermal Dynamics Corp. to obtain the skill to enable them to remain competitive in the manufacturing industry and improve the job security of their employees.

Sincerely,

Ernesto Tolentino
Business Manager
DON HENLEY
Trustee
RE: California Employment Training Panel (ETP) for Chaffey College

Dear Mr. Calderon,

Teamsters Local 166 hereby endorses the Company's (Northrop Grumman's) efforts to secure additional interpersonal skills training for our Teamsters Local 166 members employed at Fort Irwin, Ca. through the ETP.

The Union understands that the training will be assigned and given in accordance to the current Collective Bargaining Agreement as it pertains to seniority rights for volunteering, etc...

If you have any further questions feel free to contact me.

Sincerely,

J. Hodge
Vice President
Teamsters Local 166
jhodgeteamsterslocal166@aol.com
Cell- 760-881-7579
Training Proposal for:
Professionals In Human Resources Association

Agreement Number: ET16-0166

Panel Meeting of: September 25, 2015

ETP Regional Office: North Hollywood
Analyst: L. Vuong

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes</th>
<th>Industry Sector(s):</th>
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<tbody>
<tr>
<td>Priority Rate</td>
<td>Manufacturing</td>
</tr>
<tr>
<td>Retrainee</td>
<td>Transportation/Logistics</td>
</tr>
<tr>
<td>SB &lt;100</td>
<td>Technology/Other</td>
</tr>
<tr>
<td>SET</td>
<td>Healthcare</td>
</tr>
<tr>
<td>HUA</td>
<td>Wholesale Trade</td>
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<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor:</th>
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<tr>
<td>Statewide</td>
<td>☐ Yes ☐ No</td>
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<table>
<thead>
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<th>Union(s):</th>
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<tr>
<td>☐ Yes ☐ No</td>
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<table>
<thead>
<tr>
<th>Turnover Rate:</th>
<th>Managets/Supervisors: (% of total trainees)</th>
</tr>
</thead>
<tbody>
<tr>
<td>≤20%</td>
<td>≤20%</td>
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FUNDING DETAIL:

<table>
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<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
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<tbody>
<tr>
<td>$448,160</td>
<td>$31,002</td>
<td>$479,162</td>
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In-Kind Contribution: 50% of Total ETP Funding Required

$410,000
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineep Priority Rate</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10/30</td>
<td>200</td>
<td>8-200</td>
<td>0</td>
<td>$1,097</td>
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<tr>
<td></td>
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<td></td>
<td></td>
<td>Weighted Avg: 57</td>
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</tr>
<tr>
<td>2</td>
<td>Retraineep</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10/30</td>
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<td>8-200</td>
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<td>$914</td>
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<tr>
<td>3</td>
<td>Retraineep Priority Rate SB&lt;100</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10/30</td>
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<td>$1,557</td>
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<tr>
<td>4</td>
<td>Retraineep SB&lt;100</td>
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<td>20</td>
<td>8-200</td>
<td>0</td>
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</tr>
<tr>
<td>5</td>
<td>Retraineep SET HUA</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10/30</td>
<td>18</td>
<td>8-200</td>
<td>0</td>
<td>$721</td>
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<tr>
<td></td>
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</tr>
<tr>
<td>6</td>
<td>Retraineep SB&lt;100 SET HUA</td>
<td>Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10/30</td>
<td>18</td>
<td>8-200</td>
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<td>Weighted Avg: 45</td>
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</table>
Minimum Wage by County: Job Numbers 1, 2, 3 & 4: $16.44 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara Counties; $15.97 per hour for Los Angeles County; $16.02 per hour for Orange County; $15.93 per hour for San Diego County; $15.75 per hour for Sacramento County; $15.56 per hour for Alpine County; and $15.07 per hour for all other counties.

Job Numbers 5 and 6 (SET-HUA): $12.33 per hour for Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara Counties; $11.98 per hour for Los Angeles County; $12.02 per hour for Orange County; $11.95 per hour for San Diego County; $11.81 per hour for Sacramento County; $11.67 per hour for Alpine County; and $11.30 per hour for all other counties.

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

Used to meet the Post-Retention Wage?: ☑ Yes ☐ No ☑ Maybe Participating employers may use health benefits to meet the Post-Retention Wage and will vary by participating employer.

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping Staff</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Operator I</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Operator II</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Engineer I</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Engineer II</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Production Staff I</td>
<td>90</td>
<td></td>
</tr>
<tr>
<td>Production Staff II</td>
<td>40</td>
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<tr>
<td>Maintenance Staff I</td>
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<td></td>
</tr>
<tr>
<td>Maintenance Staff II</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Shop Lead</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Technician</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Administration Staff</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Manager/Supervisor I</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Manager/Supervisor II</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Sales Staff I</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Sales Staff II</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Small Business Owners</td>
<td>20</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Established in 1944, and headquartered in Gardena, Professionals In Human Resources Association (PIHRA) (www.pihra.org) is a non-profit membership organization dedicated to providing business education, networking and advocacy with an emphasis on the human resources environment. PIHRA has 17 locations throughout California, located in Los Angeles, Orange, Riverside, San Bernardino and Ventura counties. Headquartered in Gardena, PIHRA
is the largest affiliate of the Society for Human Resources Management Organization. PIHRA serves approximately 4,000 members in California. This includes private businesses, non-profit organizations, government agencies and workforce services. [Note: Only private-sector for-profit businesses will participate in this proposal.] PIHRA works with various industries including aerospace, agriculture, automotive, biotechnology, pharmaceutical, construction, distribution, education institute, manufacturing, oil and gas refinery, restaurant and food services and technology.

PIHRA provides yearly educational seminars in human resources-related topics for existing and new members, for businesses to stay current and up-to-date on issues relevant to human resource professionals. In addition, PIHRA has indicated that members have expressed a need to be more competitive, enhance job skill sets, and maintain a healthy workforce. The training proposed in this Agreement will assist in accomplishing these objectives.

**PROJECT DETAILS**

ETP-funded training will provide employers the opportunity to sustain their competitiveness, grow their businesses, meet customer demand, and remain current on rapidly changing technology. PIHRA is focused on providing opportunities to companies that do not have the resources available to provide needed training to their employees.

**Training Plan**

Training outlined in this proposal will be customized, based on employer needs assessments and training objectives. PIHRA conducts interviews with employers and training experts to maintain a comprehensive curriculum that is relevant and responsive to the needs. In addition, participating employers are encouraged to complete post-training evaluations. This feedback is used by PIHRA to measure the quality of training and meets employer demands.

This proposal will assist incumbent workers to improve job-related skills, productivity, reduce waste, and keep up with technological changes. The majority of training (90%) will be conducted at participating employer worksites; the remainder will be center-based.

**Business Skills** (25%) – Training will be provided to all occupations to improve communication skills, customer relations and business problem solving.

**Computer Skills** (20%) – Training will be provided to all occupations to learn how to effectively use the Company’s internal software applications to design, program, implement and troubleshoot new computer software programs and platforms such as social media, accounting software, and Microsoft Suite.

**Continuous Improvement** (30%) – Training will be provided to all occupations to promote teamwork and improve workflow, troubleshooting, and problem solving. Training includes process mapping, Lean Enterprise topics, and ISO Auditor compliance training.

**Management Skills** (10%) – Training will provide Managers/Supervisors with leadership and supervisory skills. Training will help staff become effective leaders in high performance workplaces.

**Manufacturing Skills** (10%) – Training will provide Shipping Staff, Operators, Production Staff, Maintenance Staff, Shop Leads, Technicians, and Small Business Owners with skills pertaining to operate new equipment, blueprint reading, inventory management and aircraft assemblies.
OSHA 10/30 (5%) - OSHA 10/30 is a series of courses “bundled” by industry sector and occupation. OSHA 10 will be provided to Shipping Staff, Operators, Production Staff, Maintenance Staff, Shop Leads, and Technicians. OSHA 30 training will be provided to Managers and Supervisors to ensure a safe work environment.

Certified Safety Training

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

Impact/Outcome

PIHRA anticipates assisting participating employers to prepare for certification programs such as ISO, OSHA 10/30 and Lean Enterprises that are typically awarded based on training and internal improvement. These certifications often lead to new market opportunities, new customers, and increased sales, which will ultimately help companies, grow and provide workforce stability.

Commitment to Training

PIHRA represents that ETP funds will not displace the existing financial commitment to training made by the participating employers. Safety training is provided in accordance with all pertinent requirements under state and federal law.

Most of the participating employers lack the resources and funding to conduct formal and structured training, especially small companies. The majority provide on-the-job, one-on-one training to new employees, safety, and off-site seminar training. ETP funding will allow these companies to introduce new business practices and services in order to sustain growth and remain competitive in California. PIHRA will only provide training to participating employers in subjects that are outside of their expertise.

Special Employment Training/High Unemployment Area

Under Special Employment Training (SET), a participating employer is not required to demonstrate out-of-state competition and trainees are not required to meet eligibility standards for retraining. This proposal has been identified for SET funding under Job Numbers 5 and 6.

All trainees in Job Numbers 5 and 6 work in a High Unemployment Area (HUA) with unemployment exceeding the state average by at least 25%. Companies located in Kern, Los Angeles, Riverside, San Bernardino, and Ventura Counties (Bakersfield, Compton, Hawthorne, City of Industry, Inglewood, Perris City, Hesperia City, Oak View CDP) qualify for HUA status and thus, qualify for the Standard Minimum Wage instead of the Statewide Average Hourly Wage.

➢ Wage Modification

For trainees in Job Numbers 5 and 6, the Panel may modify the ETP Standard Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. PIHRA is asking for a wage modification to the HUA Minimum Wage ($11.30 to $12.33) for these trainees.
Marketing and Support Costs

PIHRA has established relationships with Society for Human Resource Management and collaborative networks of businesses. PIHRA hosts conventions, meetings, mixers, and uses newsletters, websites, and email communication to promote business opportunities, procurement news, and various networking events. PIHRA has two employees dedicated to marketing, recruiting, assessment, scheduling, and training; therefore, PIHRA seeks full support cost of 8% to fund extensive marketing efforts to recruit additional participating employers and assessment activities of employers. Staff believes 8% support costs are justified in this proposal.

Substantial Contribution

PIHRA serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer has received the benefit of training with payment earned in excess of $250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 15% to reflect a substantial contribution to the cost of training. Funding for any employer that has previously been assessed a substantial contribution will be reduced by 30%. Small businesses are not subject to this provision.

Trainer Qualifications

PIHRA reports that 50% of training will be provided by in-house staff with training vendor, Custom Corporate Communications. In-house Staff are competent in the subject matter and have completed all classes required for the proficiency in each topic of training prior to delivery of training on that topic (see Training Vendor below). The other half will be delivered in-house by the participating employers.

Training Coordinator

PIHRA has designated two staff member to be responsible for all administrative responsibilities, including recording and tracking training. PIHRA will also utilize a third party vendor with ETP experience to aid in this endeavor (see Administrative Services below).

Tuition Reimbursement

PIHRA represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

DLI & Associates LLC in San Juan Capistrano assisted with development at no cost.

ADMINISTRATIVE SERVICES

DLI & Associates LLC will also perform administrative services for a fee not to exceed 13% of payment earned.
TRAINING VENDORS

Custom Corporate Communications of Redondo Beach has been retained to provide 50% of the training in Continuous Improvement, Business and Manufacturing Skills.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS
- Business Writing Skills
- Customer Service
- Communication Skills
- Leadership Skills
- Goal Setting
- Managing Change
- Performance Management Skills
- Problem Solving
- Project Coordination
- Team Building
- Time Management
- Change Management Skills
- Project Management
- Sales Skills

COMPUTER SKILLS
- Microsoft Office Suite (Intermediate and advanced)
- QuickBooks and Accounting Software
- Computer Design Software
- E-Commerce
- Enterprise and Manufacturing Management Systems

CONTINUOUS IMPROVEMENT
- Lean Enterprise
- Lean Manufacturing
- Lean Office
- Kaizen 7S
- Process Improvement
- Process Mapping
- Problem Solving
- Root Cause Analysis
- Set-Up Time Reduction
- ISO Auditor Training
- Process Management
- Quality Engineering
- Six Sigma
- Statistical Process Control
- Team Building

MANAGEMENT SKILLS (Managers/Supervisors Only)
- Leadership Skills
MANUFACTURING SKILLS
- Inventory Management
- Blueprint Reading
- Advanced Measurement Tools and Techniques
- Electrical Fundamentals
- Drive Systems Maintenance
- Programmable Logic Controllers

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

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
## Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Professionals In HR Association

<table>
<thead>
<tr>
<th>Reference No: 15-0289</th>
<th>CCG: ET16-0166</th>
</tr>
</thead>
</table>

PRINT OR TYPE IN ALPHABETICAL ORDER

| Company: AFS dba Ironman Parts and Services |
| Address: 2535 Anselmo Drive |
| City, State, Zip: Corona, CA 92879 |
| Collective Bargaining Agreement(s): No |
| Estimated # of employees to be retrained under this Agreement: 35 |
| Total # of full-time company employees worldwide: 47 |
| Total # of full-time company employees in California: 47 |

| Company: Cambro Food Service Equipment and Supplies |
| Address: 5801 Skylab Road |
| City, State, Zip: Huntington Beach, CA 92647 |
| Collective Bargaining Agreement(s): No |
| Estimated # of employees to be retrained under this Agreement: 80 |
| Total # of full-time company employees worldwide: 781 |
| Total # of full-time company employees in California: 781 |

| Company: CB Technologies Inc. |
| Address: 750 The City Drive, #225 |
| City, State, Zip: Orange, CA 92862 |
| Collective Bargaining Agreement(s): No |
| Estimated # of employees to be retrained under this Agreement: 15 |
| Total # of full-time company employees worldwide: 39 |
| Total # of full-time company employees in California: 21 |

| Company: C.L. Hann Industries |
| Address: 1020 Timothy Drive |
| City, State, Zip: San Jose, CA 95133 |
| Collective Bargaining Agreement(s): No |
| Estimated # of employees to be retrained under this Agreement: 17 |
| Total # of full-time company employees worldwide: 17 |
| Total # of full-time company employees in California: 17 |

ETP 100B (1/09)
<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s):</th>
<th>Estimated # of employees to be retrained under this Agreement:</th>
<th>Total # of full-time company employees worldwide:</th>
<th>Total # of full-time company employees in California:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynaroll</td>
<td>12640 Bradley Ave.</td>
<td>Sylmar, CA 91342</td>
<td>No</td>
<td>35</td>
<td>68</td>
<td>68</td>
</tr>
<tr>
<td>EM Coating Services Surface Technologies</td>
<td>20751 Superior Street</td>
<td>Chatsworth, CA 91311</td>
<td>No</td>
<td>45</td>
<td>1,200</td>
<td>115</td>
</tr>
<tr>
<td>Graphic Research</td>
<td>9334 Mason Ave.</td>
<td>Chatsworth, CA 91311</td>
<td>No</td>
<td>25</td>
<td>45</td>
<td>45</td>
</tr>
<tr>
<td>HOSA</td>
<td>6650 Caballero Blvd.</td>
<td>Buena Park, CA 90620</td>
<td>No</td>
<td>15</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td>Company</td>
<td>Address</td>
<td>City, State, Zip</td>
<td>Collective Bargaining Agreement(s)</td>
<td>Estimated # of employees to be retrained under this Agreement</td>
<td>Total # of full-time company employees worldwide</td>
<td>Total # of full-time company employees in California</td>
</tr>
<tr>
<td>---------</td>
<td>---------</td>
<td>-----------------</td>
<td>------------------------------------</td>
<td>---------------------------------------------------------------</td>
<td>-----------------------------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>ITO Inc. dba Kikka Sushi</td>
<td>431 Isis Ave.</td>
<td>Inglewood, CA 90301</td>
<td>No</td>
<td>150</td>
<td>1,700</td>
<td>814</td>
</tr>
<tr>
<td>Measurement Specialties Inc.</td>
<td>206 Plummer Street</td>
<td>Chatsworth, CA 91311</td>
<td>No</td>
<td>80</td>
<td>3,200</td>
<td>200</td>
</tr>
<tr>
<td>MedXM</td>
<td>1241 E. Dyer Road, #146</td>
<td>Santa Ana, CA 92705</td>
<td>No</td>
<td>38</td>
<td>250</td>
<td>250</td>
</tr>
<tr>
<td>Pentair Pool &amp; Spa</td>
<td>10951 W. Los Angeles Ave.</td>
<td>Moorepark, CA 93021</td>
<td>No</td>
<td>85</td>
<td>30,000</td>
<td>1,500</td>
</tr>
<tr>
<td>Contractor’s Name: Professionals In HR Association</td>
<td>CCG: ET16-0166</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------------</td>
<td>---------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reference No: 15-0289</td>
<td>Page 4 of 4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Company: Pitney Bowes Presort Services Unit       |
| Address: 250 Airport Circle, Suite 101            |
| City, State, Zip: Corona, CA 92880                |
| Collective Bargaining Agreement(s): No            |
| Estimated # of employees to be retrained under this Agreement: 95 |
| Total # of full-time company employees worldwide: 14,907 |
| Total # of full-time company employees in California: 334 |

| Company: Plastic Engineering and Development       |
| Address: 2731 Loker Ave., West                     |
| City, State, Zip: Carlsbad, CA 92010              |
| Collective Bargaining Agreement(s): No            |
| Estimated # of employees to be retrained under this Agreement: 50 |
| Total # of full-time company employees worldwide: 99 |
| Total # of full-time company employees in California: 99 |

| Company: Ricoh Printing Systems America Inc       |
| Address: 2390 Ward Avenue, Suite A               |
| City, State, Zip: Simi Valley, CA 93065          |
| Collective Bargaining Agreement(s): No            |
| Estimated # of employees to be retrained under this Agreement: 40 |
| Total # of full-time company employees worldwide: 87 |
| Total # of full-time company employees in California: 84 |
Training Proposal for:
Riviera, Inc. dba The Enterprise U
Agreement Number: ET16-0186

Panel Meeting of: September 25, 2015
ETP Regional Office: North Hollywood    Analyst: E. Wadzinski

PROJECT PROFILE

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

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Repeat Contractor: Yes □ No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Los Angeles, Orange, San Diego, San Francisco, Santa Clara, Tulare</td>
<td></td>
</tr>
</tbody>
</table>

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

| Turnover Rate:       | ≤20%                         |

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

FUNDING DETAIL:

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$850,000</td>
<td>$59,000</td>
<td>$909,000</td>
</tr>
</tbody>
</table>

8% In-Kind Contribution: 50% of Total ETP Funding Required $1,553,305
### TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineepriority Rate</td>
<td>Business Skills, Computer Skills, Continuous Imp., Literacy Skills, Mfg. Skills, Adv. Technology</td>
<td>400</td>
<td>8-200</td>
<td>0</td>
<td>$1,155</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraineepriority Rate</td>
<td>Business Skills, Computer Skills, Continuous Imp., Literacy Skills, Mfg. Skills, Adv. Technology</td>
<td>200</td>
<td>8-200</td>
<td>0</td>
<td>$1,123</td>
</tr>
<tr>
<td>3</td>
<td>Retraineepriority Rate</td>
<td>Business Skills, Computer Skills, Continuous Imp., Literacy Skills, Mfg. Skills, Adv. Technology</td>
<td>200</td>
<td>8-200</td>
<td>0</td>
<td>$1,112</td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** $16.44 per hour for San Francisco and Santa Clara Counties; $15.97 per hour for Los Angeles County; $16.02 per hour for Orange County; $15.93 per hour for San Diego County; and $15.07 per hour for Tulare 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 $5.00 per hour may be used to meet Post-Retention Wage.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOB NUMBERS 1 - 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounting and Finance</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Administration and Operations</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>Information Technology and Engineering</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Managers</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Marketing and Sales</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Production</td>
<td>200</td>
<td></td>
</tr>
</tbody>
</table>
INTRODUCTION

Riviera, Inc. dba The Enterprise U (The Enterprise U) was founded in 2001 to help companies, governments, and individuals acquire and sustain a competitive advantage through learning. The Enterprise U provides training services, consulting, coaching, and software solutions to clients in the industries of manufacturing, entertainment, technology, logistics, and biotechnology.

The Enterprise U (www.theenterpriseU.com) is eligible for ETP funding as a for-profit private training agency. The core participating employers qualify as manufacturers or other companies facing out-of-state competition. All training will be conducted at participating employer worksites. This is Enterprise U’s seventh ETP Contract.

PROJECT DETAILS

The Enterprise U is seeking a new contract as the funds for their most recent Agreement will be exhausted by early October 2015. Participating employers have expressed a need for training as a result of continuing pressure from out-of-state competition, and the continued struggles to keep up with technology and industry competitors. These employers are expressing the need to build employees’ skills to work in this continuously changing environment. Many are investing in automated systems and software packages to increase productivity, efficiency, and accuracy within their companies. In addition, some employers are reorganizing operations to meet procurement, development, and technology changes.

Curriculum Development

The Enterprise U’s curriculum has been shaped through many years of consultation with participating employers and leading economic development groups. The curriculum courses are customized according to specific business improvement goals and employee skills assessments. The Enterprise U meets with employer representatives and department heads to define goals and devise curriculum topics that address company-specific training objectives. The Enterprise U also relies on feedback from management and frontline workers to measure the effectiveness of training and to help define strategies for prospective skills development opportunities.

Training Plan

Training is designed to help employers maximize productivity and operational efficiency. The Enterprise U will deliver a customized training plan to each participating employer by integrating company-specific examples and exercises, along with real-world problem solving techniques. In addition to the Company specific benefits for training that have been articulated, the proposed training assessments will also promote the retention and expansion of California’s manufacturing workforce. The “core” group of employers represents over 90% of requested funding.

Business Skills (54%) – Training will be offered to all trainees. Training in customer service, communication, strategic thinking, negotiation techniques, and presentation skills will teach trainees to interact more effectively with internal and external customers and enhance business performance.

Computer Skills (15%) – Training will be offered to all occupations. Trainees will learn how to be more proficient with multiple office productivity applications, computer graphics, project applications, and computer troubleshooting.
Continuous Improvement (10%) – Training will be offered to all occupations. Training is designed to enhance teamwork, problem solving, and decision making skills. These modules will provide workers with the skills needed to implement new processes, improve productivity, and become stronger leaders through teambuilding.

Literacy Skills (1%) – Training will be offered to Production, Administration and Operations Staff. This training is intended to help employers improve written and verbal communication skills for those individuals for whom English is their second language.

Manufacturing Skills (5%) – Training will be offered to Production Staff and Managers. This training is designed to improve production efficiencies, enhance inventory control measures, and reduce waste in the manufacturing process.

Advanced Technology (15%)
Training will be offered to Information Technology (IT) and Engineering Staff. These occupations are responsible for job functions such as designing and maintaining networks, ensuring IT security, programming applications, analyzing complex data, and managing enterprise databases. This training will help IT professionals improve their technical skills with multiple platforms, enable them to effectively troubleshoot network issues, and prepare them to address the specific infrastructure needs of their respective companies.

The Enterprise U reports that the AT courses are far more costly to deliver than less complex, generalized subject matter. The cost for highly skilled, technical trainers is estimated to be approximately $125.00 per hour. Due to the added costs associated with specialized training on expensive network equipment and sophisticated software, The Enterprise U is requesting increased reimbursement for the AT courses identified in the curriculum. The 1:10 trainer-to-trainee ratio will be maintained for AT training to allow for in-depth coverage of complex course material and personal attention from the instructor.

Commitment to Training
The Enterprise U represents that ETP funds will not displace the existing financial commitment of training by participating employers. The smaller participating employers have very limited training resources and ETP funding will allow them to offer formal, on-site training to their employees. For the larger employers targeted for this project, most of their existing training resources are utilized to cover basic training, such as human resource topics, general computer skills, and on-the-job training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

Training Agency Certification
The Enterprise U is eligible as a training agency licensed by the Bureau for Private Postsecondary Education.

Marketing and Support Costs
The Enterprise U’s marketing and recruitment efforts include networking with human resource professionals and various training and development entities such as Professionals in Human Resources Association, American Society for Training and Development, and the Society for Human Resources Association. The Enterprise U’s outreach activities consist of newsletters, e-mail/online marketing campaigns, and direct contact via telephone. These activities help The Enterprise U keep its program aligned with the needs of its employer community.
The Enterprise U also allocates resources to perform needs assessments, curriculum customization, and return on investment analyses. The Enterprise U is requesting support costs to fund extensive marketing efforts and the recruitment of additional participating employers. Staff believes 8% Support Costs are justified for the reasons set forth above.

**Substantial Contribution**

The Enterprise U serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer (over 100 full-time employees) has received the benefit of training with payment earned in excess of $250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 15% to reflect that employer’s substantial contribution to the cost of training. Funding for any employer that has previously been assessed a substantial contribution will be reduced by 30%. Small businesses with 100 or fewer full-time employees (Job Number 3) are not subject to this provision.

**Tuition Reimbursement**

The Enterprise U represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

The following table summarized performance by Riviera under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0221</td>
<td>$410,600</td>
<td>09/02/2014-09/01/2016</td>
<td>250</td>
<td>395</td>
<td>364</td>
</tr>
</tbody>
</table>

Based on ETP Systems, 18,760 reimbursable hours have been tracked for potential maximum earnings of $396,014 (97% of the $410,600 Agreement amount) of which $375,507 (91%) is for trainees who have completed training and retention. Although the Agreement term date ends on 09/01/16, the Contractor expects to complete all training by October 2015 (11 months early) to earn 100% of the Agreement amount.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>Payment Earned %</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0357</td>
<td>Statewide</td>
<td>05/01/2013-04/30/2015</td>
<td>$303,266</td>
<td>$303,266</td>
<td>(100%)</td>
</tr>
<tr>
<td>ET11-0275</td>
<td>Statewide</td>
<td>06/06/11 – 06/05/13</td>
<td>$398,061</td>
<td>$388,541</td>
<td>(98%)</td>
</tr>
</tbody>
</table>
DEVELOPMENT SERVICES
N/A

ADMINISTRATIVE SERVICES
N/A

TRAINING VENDORS
N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8–200

Trainees may receive any of the following:

BUSINESS SKILLS
- Customer Service Skills
- Accountability, Empowerment, & Delegating
- Effective Meeting Skills
- Dynamic Presentation Skills
- Effective Communication Skills
- Negotiation Techniques
- Maximizing Interpersonal Skills
- Time Management & Managing Productivity
- Sales & Marketing Performance
- Relationship Building
- Strategic Thinking & Planning
- Creative Thinking & Problem Solving
- Effective Decision Making
- Financial Fundamentals
- Effective Goal-Setting
- Competitive Product, Market, or Technology Knowledge
- Project Management
- Managing Change
- Performance Management
- Organizational Development
- Knowledge Management
- Focusing, Executing, & Getting Things Done
- Success in the Workplace
- Creating a Continuous Learning Culture
- Creating a Culture of Innovation
- Business Analysis & Critical Thinking
- Appreciating Our Differences
- Emotional Intelligence

COMPUTER SKILLS
- Desktop and Cloud Applications
- Office Productivity Applications – (Intermediate and Advanced Level
  Microsoft Office Suite, Lotus Notes, and Google)
- Computer Graphics
- Operating Systems
- Project Applications
- System, Web and Mobile Tools
- Working in the Cloud
Accounting
- Accounting Theory
- Accounting Applications
- Accounting Practices

PC Troubleshooting, Maintenance, and Repair
- Electronics Theory
- Devices
- Diagnosing Problems
- Maintaining Your Equipment and Finding Service

CONTINUOUS IMPROVEMENT
- Levels of Performance
- Performance Management
- Change Management
- Process Management
- Total Quality Management
- Process Mapping
- Quality Assurance
- Six Sigma Concepts
- Lean Concepts
- Statistical Process Engineering

Team Building
- Team Building, Dynamics, & Leadership
- Leadership Skills
- Employee Engagement
- Motivating Others
- Recognizing Performance
- Coaching
- Setting Expectations & Giving Feedback
- Building Successful Teams

LITERACY SKILLS
- Vocational English & Math
  - Reading and Writing Business Documents
  - Business English
  - Business Math

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

MANUFACTURING SKILLS
- Production Operations
  - Fluid Mechanics
  - Machine Shop Basics
  - Motor Controls
  - Power Transmission
- Inventory Control
- Warehousing

Safety Training is capped at 10% of a trainees total training hours.
ADVANCED TECHNOLOGY

Software Engineering
- Programming in Visual Basic
- Programming in C
- Programming in C++
- Programming in C# and .NET
- Programming in Java
- Programming in SQL
- Software Lifestyle Methodologies

Database Engineering
- Oracle Databases
- SQL Databases
- DB2 Databases

Software Platforms
- Oracle/PeopleSoft Software Platform
- SAP Software Platform
- IBM/Lotus Software Platform

Business Intelligence
- Reporting and Analyzing Data Using Statistics and Metrics
- Scorecarding with Key Performance Indicators and Strategic Objectives

Web
- HTML
- Ruby and Ruby on Rails
- Dreamweaver
- Flash
- ColdFusion
- JavaScript
- CSS
- SharePoint
- XML/XST
- Service Oriented Architecture, REST APIs
- Python/Django
- PHP
- ASP.NET

Computer Graphics Imagery
- Maya
- Animation Techniques
- Physics and Art Topics
- Photoshop Techniques

Computer Technical Imagery
- Computer-Aided Drafting/Manufacturing/Engineering
- Revit
- SketchUp
- SolidWorks
Network Engineering
  - Electronics Overview
  - Microsoft Technology in Networking
  - Cisco Technology in Networking

Operating Systems
  - Windows Operating System in the Network
  - Novell Operating System in the Network
  - UNIX Operating System in the Network

Security Issues
  - Network Security Essentials, Key Principles and Concepts
  - Risk Assessment and Auditing
  - Security Incident Handling
  - Securing Business Applications
  - Web Security

Note: Reimbursement for retraining is capped at 200 total training hours per trainee regardless of the method of delivery.
<table>
<thead>
<tr>
<th>Company</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>Collective Bargaining Agreement(s)</th>
<th>Estimated # of employees to be retrained under this Agreement</th>
<th>Total # of full-time company employees worldwide</th>
<th>Total # of full-time company employees in California</th>
</tr>
</thead>
<tbody>
<tr>
<td>American Technologies, Inc.</td>
<td>210 Baywood Ave</td>
<td>Orange, CA 92865</td>
<td>None</td>
<td>100</td>
<td>600</td>
<td>200</td>
</tr>
<tr>
<td>DTS</td>
<td>5220 Las Virgenes Rd</td>
<td>Calabasas, CA 91302</td>
<td>None</td>
<td>100</td>
<td>385</td>
<td>251</td>
</tr>
<tr>
<td>Microfabrica</td>
<td>7911 Haskell Ave</td>
<td>Van Nuys, CA 91406</td>
<td>None</td>
<td>50</td>
<td>103</td>
<td>103</td>
</tr>
<tr>
<td>New Hampshire Ball Bearings</td>
<td>9700 Independence Ave</td>
<td>Chatsworth, CA 91311</td>
<td>None</td>
<td>100</td>
<td>1521</td>
<td>356</td>
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<tr>
<td>Company</td>
<td>Address</td>
<td>City, State, Zip</td>
<td>Collective Bargaining Agreement(s):</td>
<td>Estimated # of employees to be retrained under this Agreement:</td>
<td>Total # of full-time company employees worldwide:</td>
<td>Total # of full-time company employees in California:</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>--------------------------------</td>
<td>--------------------------------</td>
<td>--------------------------------------</td>
<td>---------------------------------------------------------------</td>
<td>--------------------------------------------------</td>
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<tr>
<td>Panasonic Appliances Refrigeration System Corporation of North America</td>
<td>2055 Sanyo Ave</td>
<td>San Diego, CA 92154</td>
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<td>50</td>
<td>300,000</td>
<td>70</td>
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<td>Printronix</td>
<td>15345 Barranca Parkway</td>
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<td>100</td>
<td>385</td>
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<td>Red Ribbon Bakeshop</td>
<td>16125 E Valley Blvd</td>
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<td>100</td>
<td>624</td>
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<td>Staar Surgical</td>
<td>1911 Walker Ave</td>
<td>Monrovia, CA 91016</td>
<td>None</td>
<td>150</td>
<td>311</td>
<td>200</td>
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</table>
Training Proposal for:

Southern California Heat & Frost Insulators and Asbestos Workers Joint Apprenticeship Committee
Agreement Number: ET16-0912

Panel Meeting of: September 25, 2015
ETP Regional Office: North Hollywood
Analyst: M. Paccerelli

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retraining</th>
<th>Priority Rate</th>
<th>Apprenticeship</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
</tr>
</thead>
</table>

| Counties Served: | Imperial, Inyo, Kern, Los Angeles, Orange, Riverside, San Bernardino, San Diego, San Luis Obispo, Santa Barbara, Ventura | Repeat Contractor: | ☒ Yes ☐ No |

| Union(s): | ☒ Yes ☐ No | International Association of Heat & Frost Insulators and Allied Workers Union Local No. 5 |

| Turnover Rate: | ≤20% |

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

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>+</th>
<th>Support Costs</th>
<th>=</th>
<th>Total ETP Funding</th>
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<tr>
<td>$429,600</td>
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<td>$29,720</td>
<td>8%</td>
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In-Kind Contribution: 50% of Total ETP Funding Required
Inherent
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Retrainee Apprentice</td>
<td>Commercial Skills, OSHA 10</td>
<td>160</td>
<td>8-200</td>
<td>0</td>
<td>$2,224</td>
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<td>Weighted Avg: 160</td>
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<tr>
<td>2</td>
<td>Retrainee Priority Rate Pre-Apprentice</td>
<td>Commercial Skills, OSHA 10</td>
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<td>8-200</td>
<td>0</td>
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<td>3</td>
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<tr>
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<td>Weighted Avg: 12</td>
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</tr>
<tr>
<td>4</td>
<td>Retraineex Priority Rate Technician</td>
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<td>20</td>
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</table>

**Minimum Wage by County:** $20.55 per hour SET Statewide wage for priority industries.

**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 $1.34 per hour may be used to meet the Post-Retention Wage in Job Numbers 1; up to $5.31 per hour in Job Number 2; and up to $3.85 per hour in Job Number 4.

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprentice Heat &amp; Frost Insulator and Asbestos Worker</td>
<td>160</td>
<td></td>
</tr>
<tr>
<td>Pre-Apprentice Heat &amp; Frost Insulator and Asbestos Worker</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Journeyman Heat &amp; Frost Insulator and Asbestos Worker</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Firestop Technician*</td>
<td>20</td>
<td></td>
</tr>
</tbody>
</table>

*The Firestop Technician classification has a separate pay scale from Journeymen and Apprentices. Firestop Technicians will meet the same post-retention wage as Apprentices and be reimbursed at the same rate as Journeymen.

### INTRODUCTION

The Southern California Heat & Frost Insulators and Asbestos Workers Joint Apprentice Committee (H&F/JAC) (www.awlocal5.com) was founded in 1962 by a consortium of labor and management organizations to provide training for Insulators and Asbestos workers in Southern California. The H&F/JAC is comprised of six members, three each appropriated by the Western Insulation Contractors Association; and the International Association of Heat & Frost Insulators.
& Allied Workers Union, Local No. 5. The same six JAC members serve as trustees over the H & F Joint Apprenticeship Trust.

This will be the third Agreement between ETP and the H&F/JAC. As a trade, Heat and Frost Insulators insulate mechanical structures, whether hot or cold, from ambient temperatures. A typical building has insulation on the hot and cold water pipes and equipment as well as the heating and air conditioning system and related mechanical equipment. Insulation materials conserve energy, reduce overall energy demand, reduce pollution, control condensation, eliminate mold, and improve workplace safety. Insulators and the contractors for which they work also perform asbestos removal work. In addition, they install fire stop material to seal openings and joints in fire-resistant rated walls.

Employer Demand for Training

The proposed training is designed to meet the signatory employers need to acquire an adequate number of skilled insulators to work on specialized projects, and to address. Overall, there are four paramount industry needs:

1. Apprentice training to prepare workers for careers in the industry - Increased requirements for technical training on a variety of materials and systems and the demand for new Apprentices combine to require additional funding. Demand for new Apprentices is driven in part by a recently enacted California law that requires apprentice training for workers in oil refineries. ETP support will enable the JAC to expand training to meet contractor demand and improve the quality of training.

2. Pre-Apprentice training to prepare workers to enter the Apprentice system - This training will ensure that new Apprentices are productive members of work teams from the first day of employment. It also will reduce turnover of probationary apprentices.

3. Journeymen need retraining to help experienced workers refresh their skills and learn to handle new insulation materials and systems that did not exist when they started out as Apprentices.

4. Training is needed for a new classification created through collective bargaining in June 2011. These are the allied workers classified as Firestop Technicians who act as helpers to Journeymen. They perform specialized jobs in fabricating and applying firestop or fireproofing materials. Because their skill level is less comprehensive, they do not require an Apprenticeship.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the program is four years, (48 months) for each of the three occupational titles.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC). A JATC is created through collective bargaining, with an equal number of members appointed by union and management with employer contributions to a training trust fund. The employers are not “participants” but are signatories to the Collective Bargaining Agreement.
RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (in this case Rio Hondo Community College). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice. (Journeymen are capped at 200 hours.) The trainer-to-trainee ratio for Apprentices is 1:25 and 1:20 for Journeymen.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5.00, reducing the priority industry rate form $18.00 to $13.00 per hour. In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (<100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26). [Note: This “blended rate” has been extended to Pre-Apprentices, for ease of administration.]

The ETP wage for Apprentices is no less than $20.55 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $20.55, as is the case in this proposal for Journeymen.

DAS Completion Rates

The average completion rate for Apprentices in the Heat and Frost Insulation industry is 61% as measured by DAS over the most recent five-year reporting period: CY2009 through CY2013. When the average completion rate for an apprenticeship program is less than half the industry average (benchmark), the Panel requires a justification for funding.

In this proposal, the DAS completion rate for Joint Apprenticeship Committee for the Heat & Frost Insulators & Allied Workers of Southern California is 73%, which exceeds the benchmark.

PROJECT DETAILS

Training Plan

Commercial Skills (95%) - Training will be offered to all occupations in installation and asbestos work. Pre-Apprentice training prepares workers for the Apprenticeship program. Training is an introduction to the trade, covering less complex skills and concepts. The Apprentice training conforms to the Curriculum approved by DAS with emphasis on safe working conditions, technical skills, communication and calculation to meet the needs of apprenticeship. The Journeyman training will help experienced workers upgrade their skills and learn to handle new insulation materials, and new systems. In addition, they will gain advanced layout and fabrication skills.

OSHA 10/30 (5%) - Training will be delivered to all occupations to ensure safe working conditions and fulfill current mandates by OSHA certified.
OSHA 10/30 is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of training for journey-level and 30 hours for frontline supervisors. OSHA 10 will be provided to Pre-Apprentices and Apprentices; and OSHA 10/30 for Journeymen and Firestop Technician based on their classifications.

This training is not required as a condition of doing business in California. However, the coursework must be approved by, and the instructors must be certified by Cal-OSHA. When delivery is by CBT all training hours must be delivered in a classroom over a finite amount of time, and the vendor must have a certified instructor present to confirm attendance.

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

Curriculum Development and Feedback

The curriculum was developed by the insulation industry with national and local input. Union and management are consulted through joint committees at all levels. The curriculum includes an introduction to the insulator’s trade with an emphasis on safe working conditions, technical skills, communication and calculation to meet the needs of Pre-Apprentices and Apprentices. Journeyman will receive training in advanced layout and fabrication sills.

The committee continuously reviews and updates the curriculum, training materials, and training facilities based upon the industry expertise of the membership.

Marketing and Support Costs

Employer demand is inherent in the apprenticeship agreements between the trainees and participating employers. Marketing is conducted through announcements, email and web posting to union members and signatory contractors.

The JAC is requesting 8% support costs to assist in Apprentice recruitment, employer outreach, and assessment of employer-specific job requirements. Although many of the participating employers have already been notified, additional outreach and needs assessments will take place throughout the Agreement term. Staff recommends the 8% support costs.

Commitment to Training

JAC represents that ETP funds will not displace the existing financial commitment to training of participating employers, and anticipates that the opportunity for enhanced training made possible by ETP funds will encourage an ongoing financial commitment in this area.

Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by the H&F/JAC under an active ETP Agreement:
Based on ETP Systems, 26,283 reimbursable hours have been tracked sufficient to support earnings of $312,380 (100% of approved amount). Of the 274 trainees who completed training, 28 have been retained and 246 are in retention.

**PRIOR PROJECTS**

The following table summarizes performance by the H&F/JAC under an ETP Agreement that was completed within the last five years:

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<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>Payment Earned %</th>
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<tbody>
<tr>
<td>ET11-0233</td>
<td>Los Angeles</td>
<td>6/15/11-6/14/13</td>
<td>$198,271</td>
<td>$161,962</td>
<td>(82%)</td>
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</tbody>
</table>

**DEVELOPMENT SERVICES**

Steve Duscha Advisories in Sacramento assisted with development of this proposal for a flat fee of $10,000.

**ADMINISTRATIVE SERVICES**

Steve Duscha Advisories will also perform administrative services for a fee not to exceed 12.2% of payment earned.

**TRAINING VENDORS**

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 200

Trainees may receive any of the following:

COMMERCIAL SKILLS

Pre-Apprentice Training
- Engineering science of the reduction of heat energy
- Function and purpose of insulation
- Types of insulation, finishes and covering
- Application to HVAC and other mechanical equipment
- Characteristics of insulation material
- Measurements
- Attachment methods
- Safe working procedures
- Using lifts
- Asbestos removal procedures and safety
- Protective devices
- Effective communications
- Lead removal procedures and safety

Apprentice
- Asbestos removal, advanced practices
- LEED building basics
- Layout and fabrication: unequal tee
- Layout and fabrication: elbows
- Layout and fabrication: beveled and flat end caps
- Layout and fabricate square to round
- Insulation equipment
- Insulation materials
- Layout and fabricate: concentric reducers
- Layout and fabricate: equal tee
- Layout and fabricate: eccentric reducer
- Blueprint reading
- Codes and specifications
- Layout and fabrication: advanced skills
- Lead abatement
- Working with lifts, advanced practices
- Construction math

Journeyman
- Advanced Layout
- Advanced fabrication
- Products and specifications
- LEED building concepts and applications
- Energy surveys
- Asbestos removal
- Lead awareness and abatement
- Working in confined spaces
- Handling hazardous waste
Firestop Technician
- Compartmentation
- Total fire protection
- Firestopping role in compartmentation
- Safe working procedures
- Using lifts
- Protective devices
- Tools and equipment
- Plans and specifications
- Basic construction techniques and materials
- Code review and firestop testing
- Compartmentation assemblies
- Through-penetration identification and system selection

OSHA 10/30 (Certified OSHA Instructor)
- OSHA 10 (requires 10 hours completion)
- OSHA 30 (requires 30 hours completion)

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 hours per trainee, regardless of the method of delivery.
Training Proposal for:
Southern California Roofers and Waterproofers Joint Apprentice and Training Fund

Agreement Number: ET16-0909

Panel Meeting of: September 25, 2015
ETP Regional Office: North Hollywood  Analyst: M. Webb

PROJECT PROFILE

<table>
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<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Priority Rate</th>
<th>Apprenticeship</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
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</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Los Angeles, Orange, Riverside, Ventura, San Bernardino, Santa Barbara, San Luis Obispo</td>
<td>Repeat Contractor:</td>
<td>☑ Yes ☐ No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Union(s):</td>
<td>☑ Yes ☐ No United Union Roofers, Waterproofers and Allied Workers Local Unions 36 and 220</td>
<td>Turnover Rate:</td>
<td>&lt;20%</td>
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<tr>
<td></td>
<td></td>
<td>Managers/Supervisors: (% of total trainees)</td>
<td>N/A</td>
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<td></td>
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FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>$420,464</th>
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<tbody>
<tr>
<td>Support Costs</td>
<td>$28,868 8%</td>
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<tr>
<td>Total ETP Funding</td>
<td>$449,332</td>
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In-Kind Contribution: 50% of Total ETP Funding Required
Inherent
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine Apprentice</td>
<td>Commercial Skills, Computer Skills, Literacy Skills, OSHA 10</td>
<td>200</td>
<td>8-210</td>
<td>0</td>
<td>$1,223</td>
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<td></td>
<td></td>
<td></td>
<td>$20.55</td>
</tr>
<tr>
<td>2</td>
<td>Retraine Priority Rate Journeymen</td>
<td>Commercial Skills, Computer Skills, Literacy Skills, HazMat, HAZWOPER OSHA 10/30</td>
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<td></td>
<td></td>
<td></td>
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<td>$29.12</td>
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Minimum Wage by County: SET/Priority Industry: $20.55 per hour

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

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

Up to $4.28 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
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</thead>
<tbody>
<tr>
<td>Apprentice Roofer/Waterproofer</td>
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<td>200</td>
</tr>
<tr>
<td>Journeymen Roofer/Waterproofer</td>
<td></td>
<td>396</td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1959, the Southern California Roofers and Waterproofers Joint Apprenticeship and Training Fund (SoCal Roofers and Waterproofers JATF), is responsible for approximately 400 Apprentices and 600 Journeymen in Southern California. Training provided includes multiple aspects of the trade including damp, water and metal roofing; tiles, shingles, solar panels, solar roof tiles; integrated photovoltaic; and waterproofing systems and techniques.

SoCal Roofers and Waterproofers JATF have two training centers located Pomona and Riverside. This program is governed by a joint labor-management committee. The Board of Trustees is comprised of an equal number of Employer and Union Trustees. Participating Employers and the association of the JATC continue to support participation in ETP projects to fund training for union workers.

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). Training is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training.
Depending on the type of trade, apprenticeship programs vary in length. In this case the program is four years.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC). A JATC is created through collective bargaining, with an equal number of members appointed by union and management with employer contributions to a training trust fund. Employers are not “participants” but are signatories to the Collective Bargaining Agreement.

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (in this case Los Angeles Unified School District). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice. (Journeymen are capped at 200 hours.)

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5.00, reducing the priority industry rate form $18.00 to $13.00 per hour. In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (<100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26). [Note: This “blended rate” has been extended to Pre-Apprentices, for ease of administration.]

The ETP wage for Apprentices is no less than $20.55 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $20.55, for both Apprentices and Journeymen.

DAS Completion Rates

The completion rate for this DAS-approved program for 2009-2013 is 31.77% and exceeds the industry completion percentage of 21%. This meets Panel standards.

PROJECT DETAILS

SoCal Roofers and Waterproofers have the continued need to maintain and improve the skill sets of Journeymen and Apprentice workers in the industry. Tasks being asked of workers require familiarity with materials, and new equipment used in the roofing industry. There is also a growing need to replace retirees who will retire within the next few years. Trainees will receive training to make certain they can perform job duties as well as workers that are more experienced in the trade.

Work in the construction industry has increased over the last two to three years. As a result, trainees (apprentices and journeymen) must maintain and upgrade skills to remain up to date with new roofing techniques and technologies such as water recapturing systems, vector mapping, green renewable energy systems, and flood testing. Journeymen will also receive training in Hazardous Materials and HAZWOPER to address safety issues encountered when working more complex jobs.
Training Plan

Training provided will result in certifications to work in the Roofing and Waterproofing Industry. Courses provided include Certified Roofing Torch Applicator, Hazardous Materials Training, Green Techniques and Rigger Crane Operation.

Commercial Skills (80%): Training will be offered to Apprentice and Journeymen to develop and enhance skill sets required to earn certification in the roofing industry. Trainees will learn to identify products and materials, insulation methods, and other application techniques.

Computer Skills (4%): Training will be offered to all occupations to ensure workers are able to utilize computer tracking systems, create reports, and use computer programs in Microsoft Office (Excel, Word, Outlook).

Literacy Skills (5%): Training will be offered to all trainees who speak English as a second language (VESL). Curriculum provided will focus on vocabulary, equipment and safety standards used in the roofing industry.

OSHA 10/30 (5%): OSHA 10 training will be provided to Apprentices and OSHA 10/30 will be provided to Journeymen. Training will ensure workers are aware of the prevention of health hazards and safety in workplaces.

Hazardous Materials (3%): This training will be offered to Journeymen and includes environmental management skills for staff that develops and administer plans/systems for handling hazardous materials and industrial waste.

HAZWOPER (3%): Training will be offered to Journeymen. Training may 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.

Certified Safety Training

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

2. Hazardous Waste Operations and Emergency Response Standard (HAZWOPER): This training is also a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom or CBT training, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). Field training is also required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

3. Hazardous Materials (HAZMAT): This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT.
this proposal, Journeymen will receive up to 40 hours of training. Field training may be required, although not funded by ETP. Completion of the training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, certification is by certified trainers.

**Commitment to Training**

Employers will continue to contribute to the training association for every hour worked by employees. Safety training is provided in accordance with all pertinent requirements under state and federal law.

- **Training Infrastructure**

SoCal Roofers and Waterproofers JATF have designated one staff member to handle all administration duties for this project. This individual has experience with ETP requirements and has administered prior Agreements with success. Staff will schedule training, collect all training rosters, perform data entry, and maintain contact with ETP analysts to administer and assess progress throughout the duration of the contract.

**Marketing and Support Costs**

Informational flyers are distributed on an on-going basis either in person or via email/postage. Staff also maintains communication with participating employers and the roofing contractors association to recruit and keep them informed about training opportunities provided through SoCal Roofers and Waterproofers JATF.

To ensure training being delivered meets industry standards, the JATF continues to provide training evaluations to assess and implement changes to their program if needed. Participant feedback provides the JATF with a valid way to measure the program’s competency and overall effectiveness in providing a qualified workforce.

SoCal Roofers and Waterproofers JATF requests 8% support costs to assist in recruitment, employer outreach, and assessment of employer-specific job requirements. Assessments and recruitment will take place throughout the duration of the Agreement. Staff recommends the 8% support costs.

**Trainer Qualifications**

All trainers are Journeyman subject matter experts with up to 30 years of experience. Trainers are required to participate in training to upgrade skills and ensure they are delivering the latest methods and roofing techniques to trainees in the program.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**ACTIVE PROJECTS**

The following table summarizes performance by SoCal Roofers and Waterproofers JATF under an active ETP Agreement:
SoCal Roofers and Waterproofers JATF

September 25, 2015

ET16-0909

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0907</td>
<td>$537,000</td>
<td>12/23/13-12/22/15</td>
<td>700</td>
<td>*632</td>
<td>632</td>
</tr>
</tbody>
</table>

*Based on ETP Online Tracking, 33,536 reimbursable hours have been delivered. This is sufficient to support earnings at 93% of approved amount. *To date, 285 Apprentice and 347 Journeymen have completed all training hours.

PRIOR PROJECTS

The following table summarizes performance by SoCal Roofers and Waterproofers JATF under an ETP Agreement that was completed within the last five years:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
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<tbody>
<tr>
<td>ET12-0207</td>
<td>Pomona</td>
<td>12/26/11-12/25/13</td>
<td>$335,024</td>
<td>$284,653</td>
<td>(85%)</td>
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</tbody>
</table>

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200 Job Number 1

Trainees may receive any of the following:

Journeyman

COMMERCIAL SKILLS

- Ethylene Propylene Diene Monomer
  - Emphasis on Seam Details, Wall Details, Pipe Flashings, Curb Flashings, Corners
- Built-Up Roofing
  - Mopping Techniques and Applying of Drains, Curbs, Walls, Scuppers, Felt Machine Operation and Kettle Operation
- Coatings – For the Purpose of Damproofing and Waterproofing
  - Balconies
  - Deck Coating
  - Equipment Wells
  - Traffic Coating
- Electronic Vector Mapping Systems
  - Membrane Integrity Testing
  - Electronic Leak Detection
- Water Recapturing Systems
  - Advantages and Disadvantages
  - Equipment
  - Rain Water Harvesting
- Flood Testing Technology
  - Inspection and Testing of Construction Materials
  - Testing Labs
- Green Retrofit
  - Energy Efficiency Roofs
  - Applications
  - Moisture Treatment
- Infrared Moisture Detection
  - Nuclear Surveys
  - Analysis & Visualization of Collected Data
- Building Envelope Inspection
  - Below Grade
  - Walls and Windows
  - Roofs
- Hot Air Welding
  - Hot Air Welding of Seams, Curbs, Corners, Pipes, Drains and Machine Operation
- Insulation
  - Crickets
  - Sound
  - Wash Backs
- Modified
  - Atactic Polypropylene Torch Applied and Styrene Butadiene Mopped Applied Membranes
  - Drains, Pipe, Curb and Wall Flashings
- **Paver Systems**
  - Ballast Pavers
  - Concrete
  - Rack Systems
  - Stone Ballast
- **Seismic Retrofit**
  - Applications
  - Expansion Joints
  - Strengthen Structures
- **Shingles**
  - Installation of Shingles in a Valley and Around Chimneys, Dormers and Through Pipes and Vents
- **Single Ply**
  - Roof Deck Insulations
  - Techniques and Installation of Single Ply
- **Slate & Tile**
  - Proper Steps for Starting and Detailing Slate and Tile Roofs
  - Silica Training
- **Spray Polyurethane Foam**
  - Techniques and Installation Procedures
- **Standing Seam’s Application**
  - Detail
  - Field Set-Up
- **GAF Materials**
  - Learn the Latest GAF Materials Heat-Welding Details
- **Firestone Building Products**
  - Learn the Latest Specification Requirements for Their Roofing Systems
- **Johns Manville**
  - Heat Welding and Detail Requirements for Manville’s Membranes and Various Roofing Systems
- **Metal Roofing**
  - Application
  - Details
  - Systems
- **Sarnafil Roofing Systems**
  - Sarnafil’s Polyvinyl Chloride, Hot Air Welded Systems and Detail Requirements
  - Soprema Roofing Systems
  - Carlisle/Syntec Building Products
  - Product Details & Requirements for Roofing Systems
- **Certified Roofing Torch Applicator**
  - Certified Roofing Torch Applicator Program
  - Application Techniques, Known Facts of Propane Gas and Combustion on Torch Applied Membranes
  - Recertification Program
- **Torch Safety Techniques**
  - Accident Prevention
  - Application Techniques
  - Fire Safety
• Confined Space Entry
  o Confined Space Competent Person
  o Confined Space Entry
• Fall Protection Training
  o Fall Protection Competent Person
  o 8-Hour Fall Protection
• Scaffold Training
  o Dismantle
  o Fall Protection Awareness
  o How to Build/Code
  o Safety Guidelines
  o Scaffolding Competent Person
• Foreman Skills
  o Advanced Blueprint Reading
  o Budgeting/Scheduling
  o Leadership
  o Mentoring
• Construction Site Project Management
  o Emergency Response Planning
  o Foreman Responsibility for Communication, Documentation and Reporting
  o Worker Responsibility for Documentation and Reporting
• Forklift Training & Aerial Work Platform
  o Aerial Lifts
  o Boom Lift
  o Forklift (Gradall) Certification
  o Scissor Lift
  o Class 4 & 5
• GHS Labeling
  o Requirements
  o Signal Words
• Rigging & Signaling
  o Rigger In Crane Operation
  o Signal Persons Hand and Voice Signals
• Going Green/Green - Renewable Energy Systems
  o Design and Install Equipment for Energy Efficiency
  o Electricity
  o Energy Efficiency for Roofing
  o Green (Vegetated) Roofs
  o Green Roof Systems
  o Green Roofs
  o History of Solar Energy
  o Monolithic Membrane
  o Photovoltaic Cells
  o Photovoltaic System
  o Photovoltaic System Performance
  o Rooftop Solar PV
  o Solar Installation
  o Solar PV Systems
- Waterproofing & Damp proofing
  - Asphalt Overlay
  - Below Grade
  - Confined Space Training
  - Elastomeric Coatings
  - Excavations
  - Hot Applied
  - Hot Rubber
  - Interior & Exterior
  - Liners
  - Materials and Handling
  - Monolithic Membrane 6125
  - Planters
  - Sheet Applied
  - Split Slab Construction
  - Techniques and Applications
  - Vertical Waterproofing
- Weatherproofing Envelope Systems
  - Air Barrier System
  - Caulking
  - Climate Control
  - Commercial and Residential Exterior
  - Moisture Barrier System
- Asbestos Craft Worker/Class II Roofer Course
  - 8-Hour Asbestos Roofer Worker
- C.P.R & First Aid
  - Adult CPR
  - AED
  - First Aid
- Flagger Training
  - Construction Zone
  - Residential Zone
  - Traffic Zone
- Globally Harmonized Systems
  - Acclimatization

**OSHA 10/30** (Certified OSHA Instructor)
- OSHA 10 (Construction Outreach-requires 10 hrs)
- OSHA 30 (Construction Industry-requires 30 hrs)

**HAZARDOUS MATERIALS**
- Hazardous Waste
- Hazardous Materials
- Hazardous Chemical Cleaning
- Hazardous Waste Cleaning
- Hazardous Waste Operations and Emergency Response
HAZWOPER
- HAZWOPPER Instructor Certified Training (requires completion of certified course)

COMPUTER SKILLS
- Basic Computer Skills for Construction Industry
  - Creating Jobsite Reports
  - Data Entry in Tracking Systems
  - Microsoft Office (Outlook, Word, Excel, PowerPoint)
  - Email/Internet

LITERACY SKILLS
- Vocational English as a Second Language for Roofers & Waterproofers
  - Entering the Roofing Industry
  - Equipment
  - Roofing and Waterproofing Vocabulary
  - Safety
  - Tools

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 or OSHA 10/30)

Apprentice

Class/Lab Hours
8-210

COMMERCIAL SKILLS
- Ethylene Propylene Diene Monomer
  - Emphasis on Seam Details, Wall Details, Pipe Flashings, Curb Flashings, Corners
- Built-Up Roofing
  - Level 3A
  - Level 3B
  - Level 3C
  - Mopping Techniques and Applying of Drains, Curbs, Walls, Scuppers, Felt Machine Operation and Kettle Operation
  - Safety, Tools & Equipment
- Hot Air Welding
  - Hot Air Welding of Seams, Curbs, Corners, Pipes, Drains and Machine Operation
- Modified
  - Level 2A
  - Level 2B
  - Atactic Polypropylene Torch Applied and Styrene Butadiene Mopped Applied Membranes
  - Drains, Pipe, Curb and Wall Flashings
- **Shingles**
  - Installation of Shingles in a Valley and Around Chimneys, Dormers and Through Pipes and Vents

- **Slate & Tile Classes**
  - Proper Steps for Starting and Detailing Slate and Tile Roofs
  - Silica Training

- **Spray Polyurethane Foam**
  - Techniques and Installation Procedures

- **Single Ply**
  - Level 2A
  - Level 2B
  - Safety, Tools & Equipment
  - Techniques and Installation of Single Ply

- **GAF Materials**
  - Learn the Latest GAF Materials Heat-Welding Details

- **Firestone Building Products**
  - Learn the Latest Specification Requirements for Their Roofing Systems

- **Johns Manville**
  - Heat Welding and Detail Requirements for Manville’s Membranes and Various Roofing Systems

- **Sarnafil Roofing Systems**
  - Sarnafils Polyvinyl Chloride, Hot Air Welded Systems and Detail Requirements

- **Soprema Various Roofing Systems**

- **Carlisle/Syntec Building Products**
  - Products and Details Requirements for their Various Roofing Systems

- **Certified Roofing Torch Applicator**
  - Certified Roofing Torch Applicator Program
  - Application Techniques, Known Facts of Propane Gas and Combustion on Torch Applied Membranes

- **Certified Roofing Torch Applicator – Recertification**
  - 8-Hour Re-Certification

- **Torch Safety Techniques**
  - Accident Prevention
  - Application Techniques
  - Fire Safety

- **Fall Protection Training**
  - 8-Hour Fall Protection
  - Fall Protection Competent Person

- **Flagger Training**
  - Construction Zone
  - Residential Zone
  - Traffic Zone
• Scaffold User Training
  o Code
  o Dismantle
  o Fall Protection Awareness
  o How to Build
  o Safety Guidelines
  o Scaffolding Competent Person
• Forklift Training & Aerial Work Platform
  o Aerial Lifts
  o Boom Lift
  o Forklift (Gradall) Certification
  o Scissor Lift
  o Class 4 & 5
• GHS Labeling
  o Requirements
  o Signal Words
• Going Green
  o Design and Install Equipment for Energy Efficiency
  o Electricity
  o Energy Efficiency for Roofing
  o Green Roof Systems
  o Green Roofs
  o History of Solar Energy
  o Photovoltaic Cells
  o Photovoltaic System
  o Photovoltaic System Performance
  o Solar Installation
• Green - Renewable Energy Systems
  o Green (Vegetated) Roofs
  o Green Roof Systems
  o Rooftop Solar PV
  o Solar PV Systems
• Electronic Vector Mapping Systems
  o Membrane Integrity Testing
  o Electronic Leak Detection
• Water Recapturing Systems
  o Advantages and Disadvantages
  o Equipment
  o Rain Water Harvesting
• Flood Testing Technology
  o Inspection and Testing of Construction Materials
  o Testing Labs
• Globally Harmonized Systems Training
  o Acclimation
- Heat Illness Prevention
  o Outdoor
  o Indoor
- C.P.R & First Aid
  o Adult CPR
  o AED
  o First Aid
- Rigging & Signaling
  o Rigger in Crane Operations
  o Signal Persons Hand and Voice Signals
- Waterproofing
  o Confined Space Entry Training
  o Materials and Handling
  o Techniques and Applications
- Weatherproofing Envelope Systems
  o Air Barrier System
  o Climate Control
  o Commercial and Residential Exterior
  o Moisture Barrier System
- Asbestos Craft Worker/Class II Roofer Course
  o 8-Hour Asbestos Roofer Worker
- Foremen Training
  o Advanced Blueprint Reading
  o Budgeting/Scheduling
  o Leadership
  o Mentoring

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

**LITERACY SKILLS**
- Vocational English as a Second Language for Roofers & Waterproofers
  o Entering the Roofing Industry
  o Equipment
  o Roofing and Waterproofing Vocabulary
  o Safety in the Industry
  o Tools

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 OSHA 10)

Note: Reimbursement for training in capped at 210 total hours per trainee (200 hours RSI + 10 hours of OSHA) in Job Number 1 and capped at 200 total hours per trainee, including OSHA 10/30 in Job Number 2 regardless of the method of delivery.
Training Proposal for:
Ventura County Electrical Joint Apprenticeship and Training Trust Fund

Agreement Number: ET16-0911

Panel Meeting of: September 25, 2015

ETP Regional Office: North Hollywood
Analyst: M. Reeves

### PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Apprenticeship</th>
<th>Priority Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Sector(s):</td>
<td>Construction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Priority Industry:</td>
<td>☑ Yes</td>
<td>☐ No</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Counties Served:</th>
<th>Ventura</th>
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</thead>
<tbody>
<tr>
<td>Repeat Contractor:</td>
<td>☑ Yes</td>
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</tbody>
</table>

<table>
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<tr>
<th>Union(s):</th>
<th>☑ Yes</th>
<th>☐ No</th>
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<tbody>
<tr>
<td>International Brotherhood of Electrical Workers, Local 952</td>
<td></td>
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<table>
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<tr>
<th>Turnover Rate:</th>
<th>≤20%</th>
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<table>
<thead>
<tr>
<th>Managers/Supervisors:</th>
<th>(% of total trainees)</th>
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</thead>
<tbody>
<tr>
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<td>N/A</td>
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### FUNDING DETAIL:

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<th>+</th>
<th>Support Costs</th>
<th>=</th>
<th>Total ETP Funding</th>
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<td>$208,400</td>
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<td>$14,400</td>
<td>8%</td>
<td>$222,800</td>
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In-Kind Contribution: 50% of Total ETP Funding Required

Inherent
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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<tbody>
<tr>
<td>1</td>
<td>Retraineer Journeyman Priority Rate</td>
<td>Business Skills, Commercial Skills, Computer Skills, OSHA 10/30</td>
<td>50</td>
<td>8-200</td>
<td>0</td>
<td>$564</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 24</td>
<td>$41.11</td>
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<tr>
<td>2</td>
<td>Retraineer Apprentice</td>
<td>Commercial Skills, OSHA 10</td>
<td>70</td>
<td>8-210</td>
<td>0</td>
<td>$2,780</td>
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<tr>
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<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 200</td>
<td>$20.55</td>
</tr>
</tbody>
</table>

Minimum Wage by County: $20.55 per hour SET Statewide Priority Industry.
Health Benefits: ☑ Yes ☐ No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: ☑ Yes ☐ No ☐ Maybe

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journeyman Electrician/Inside Wireman</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Apprentice Electrician/Inside Wireman</td>
<td>70</td>
<td></td>
</tr>
</tbody>
</table>

INTRODUCTION

Founded in 1977, the Ventura County Electrical Joint Apprenticeship and Training Trust Fund (Ventura Electrical JATF) (www.vcjatc.org) is a joint effort of the International Brotherhood of Electrical Workers Local 952 and the National Electrical Contractors Association. The JATF is comprised of labor and management representatives and is governed by a Board of Trustees. With approximately 100 participating employers, the union represents over 400 electricians in Ventura County.

The five-year Apprenticeship program offers workers the opportunity to receive classroom and hands-on experience in installation, wiring methods and utilization systems. Apprentices attend classroom training twice a week (1,080 hours) and complete a total of 8,000 hours with electrical contractors throughout Ventura County. This work is performed in residential, commercial and industrial buildings.

Inside Wiremen are trained at the Ventura training facility to install and maintain electrical systems. These electrical systems are found in commercial and industrial facilities, electric vehicle stations and transit systems. In an effort to promote new advances in green technology, the JATF offers training opportunities to its members in solar panel installation. These courses focus on renewable energy and efficient electrical control systems.
Employer Demand for Training

Signatory employers and union representatives have identified the following reasons for Journeyman skills training, add new courses in Apprentice Related & Supplemental Instruction (RSI): new energy efficiency regulations, the need to reduce costs to remain competitive, higher quality standards, and the increasing complexity of construction projects. Specific construction projects that are generating demand for skilled Apprentices and Journeyman Electricians in the Ventura County region are shown below:

- Ventura County Medical Center
- Solar PV Installation at the Ventura County Government Center
- Elm Street Elementary School
- Parking Structure at Community Memorial Hospital
- La Entrada Housing Project
- Movie studios in Moorpark
- Multiple small school jobs
- Ongoing projects at the Proctor and Gamble paper plant in Oxnard
- Ongoing projects at Amgen Corporation in Newbury Park
- Ongoing projects at Baxter Pharmaceuticals in Thousand Oaks

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 Panel adopted the Apprenticeship Training Program as a pilot in March 2012. It is designed to supplement cost of delivery for the RSI portion of DAS-approved apprenticeship training.

Apprenticeships are a multi-year training program that results in DAS certification to work as a Journeyman. They are authorized in California under the Shelly-Maloney Apprenticeship Labor Standards Act of 1939. Apprentices commit to training under contract with an apprenticeship program sponsor. They advance through a series of apprenticeship levels as they complete modules of RSI and on-the-job training. Wages are paid for hours worked on the job, in progression with a series of advancements up to the Journeyman level.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC) created through collective bargaining, with an equal number of members appointed by union and employers.

Depending on the type of trade, apprenticeship programs vary in length, typically from 2-6 years for ETP funding. However, the first-year Apprentices are not eligible due to the higher drop-out rates associated with this entry-level. As noted earlier, this program runs five years.

Here, training is administrated by the trust fund that supports the JATC, and is also jointly managed between union and employers. The employers are not “participants” but are signatories to the Collective Bargaining Agreement.

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (in this proposal Ventura county Superintendent of Schools). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice.
For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

Because ETP funding cannot displace another source of government funds, the fixed fee rate is reduced by $5.00 to account for adult education funding appropriated each year for Apprentice training through the California Community College Chancellor's Office and Department of Education. This changes the ETP Priority Industry Rate from $18.00 to $13.00 per hour for all Apprentice Job Numbers.

In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (<100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26).

Under the Apprenticeship Training Program, the post-retention wage has been standardized to $20.55 per hour reflecting the Special Employment Training (SET) wage for Priority Industry. This wage was chosen for ease of administration. However, the actual wage rate will be used if higher, as is true for Journeyman in this proposal.

DAS Completion Rates

The completion rate for this DAS-approved program for 2009-2013 is 79.47% and exceeds the industry completion percentage of 66.31%. This meets Panel standards.

PROJECT DETAILS

To meet current and future demand for electrical industry workers, Ventura Electrical JATC will provide training for both large and small employers. The proposed training, entirely center-based, is scheduled to commence approximately a week following Panel approval.

Training Plan

The following classes will be offered to Journeymen:

Commercial Skills (80%) - Green training will be the focus due to the demand for energy efficient construction methods and technologies. Training will cover energy-efficient technologies and products such as green building materials, solar photovoltaic panels, new motor controls, advanced welding, green materials testing and audit equipment.

Business Skills (5%) - Electricians must understand new national building codes and green practices; follow certification guidelines; use more collaborative bidding and project development practices; meet budgets; interact with various types of construction workers; and implement green solutions in traditional work environments. Training will give workers the tools to plan, organize, and manage their construction projects more efficiently. Training will also include teambuilding and leadership skills so that electricians can lead teams in an effective and efficient manner.

Computer Skills (5%) - Training will include scheduling, planning and modeling software. AutoCAD and Job Tracking applications will provide trainees with the tools to modify blueprints,
look up project requirements, build budgets and timelines, design virtual buildings, and adjust computerized control systems.

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

This training provides a complete overview of occupational safety and health so that workers are more knowledgeable about workplace hazards and understand their rights as workers. Equipment and materials not used correctly can also lead to injuries for the worker and puts other people in the area in potential danger.

The following classes will be offered to **Apprentices**:

**Commercial Skills** (90%) - Apprentices will learn to install, maintain, and repair various types of electrical and electronic equipment in commercial, industrial and residential establishments. They will also learn to install, connect and test electrical wiring systems for lighting, heating, air conditioning and communications for any building or structure. This training will provide the skills to perform the following:

- Installing New Wiring and Repairing Old Wiring
- Installing Receptacles, Lighting Systems and Fixtures
- Troubleshooting and Repairing Electrical Systems
- Establishing Grounding Systems
- Installing Service to Buildings and Other Structures
- Providing Power and Controls to Motors, HVAC, and Other Equipment
- Installing Fire Alarm and Security Systems
- Installing, Maintaining and Repairing Lightning Protection Systems

**OSHA 10 (10%)** - Electricians work under extremely dangerous conditions which require considerable physical effort on the part of the Apprentice such as lifting, climbing, crouching, and working in cramped areas. With the potential for serious injury or death of workers and/or others in the vicinity of the work area, participating employers and property owners need electricians to undergo additional training to ensure that their skills are up to date and that work is performed with optimal efficiency and safety.

**Curriculum Development**

The Curriculum was developed and customized with input from both labor and management representatives to address the local needs of union members, participating employers and the industry as a whole. IBEW Local 952 was directly involved in the development of the Curriculum and training plan, and is in full support of the proposed training for its members.

The Apprentice program uses the National Joint Apprenticeship and Training Committee’s Curriculum which was developed for the exclusive use of IBEW-NECA JATCs.
Marketing and Support Costs

Ventura Electrical JATF conducts marketing through direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails and its website. Class information will be disseminated throughout the year to all apprentice and journeyman electricians within the jurisdiction, as well as to the electrical contractors who employ them.

Staff from the JATF office will assist with marketing, recruitment, needs assessments and scheduling. Ventura Electrical JATF is requesting 8% support costs to fund its staff in recruiting and qualifying additional participating employers for this program. Many participating employers have already been recruited; however, additional recruitment and assessment activities are anticipated. Staff recommends the 8% support costs.

Commitment to Training

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. Safety training is provided by the participating employers in accordance with all pertinent requirements under state and federal law.

➢ Trainer Qualifications

Ventura Electrical JATF has one full-time trainer and 15 part-time trainers. All trainers are former or current members of the trade and some have received Master Certification status by the National Joint Apprenticeship and Training Committee.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by Ventura Electrical JATF under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0908</td>
<td>$315,340</td>
<td>01/02/14 – 01/01/16</td>
<td>233</td>
<td>52</td>
<td>52</td>
</tr>
</tbody>
</table>

Based on ETP Systems to date, 14,663 reimbursable hours have been entered sufficient to earnings of $219,608 (70% of the approved Agreement amount). To date, 58 Journeymen and 72 Apprentices have completed the minimum required hours. Thus far, 52 Apprentices have completed training and retention. The proposed Agreement has been right-sized in alignment with projected earnings.

DEVELOPMENT SERVICES

California Labor Federation in Sacramento and Strategy Workplace Communications in Oakland assisted with development of this proposal at no cost.
ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8 – 200 (Job Number 1)

Trainees may receive any of the following:

JOURNEYMAN

COMMERCIAL SKILLS

- Codeology
  - National Electrical Code
  - Other Recognized Standards (Installation Changes)
  - Plan, Build, and Use
  - Related Standards (Mandatory and Permissive Rules)
  - Special Occupancies and Equipment
  - Arc Flash

- Analog/Digital Circuit (AC/DC) Principles
  - Math for Electricians
  - Ohm’s Law
  - Generators
  - Inductance/Reactance
  - Series/Parallel Circuits

- Grounding
  - Grounding and Bounding
  - National Electrical Code Article 100-Definitions and Provisions
  - National Electrical Code Article 110-Requirements
  - National Electrical Code Article 90-Introduction
  - National Electrical Code Article Chapters 1-4
  - Significant Changes to National Electric Code

- Fire Alarm Systems and Installations
  - Definitions and Systems
  - Initiating Devices and Notification Systems
  - National Electrical Code and Installation Requirements
  - Start Up and Check Out Procedures
  - National Fire Protection Act, 1972

- Fire Life Safety
  - National Electrical Code (Relating to Fire Alarms)
  - National Electrical Code Article 725
  - National Electrical Code Article 760
  - NFPA 72
  - Principles of Electronics

- Industrial Motor Control
  - Control Relays and Timers
- Jogging and Plugging Controls
- Manual Starters and Magnetic Coils
- Push Buttons, Selector Switches and Mechanical Devices
- Solid State Electronic Devices
- Variable Frequency Drives

- Programmable Logic Control
  - Developing Ladder Programming
  - Introduction to Programmable Equipment
  - Programming Programmable Logic Controllers
  - Using Timers and Counters in Logic Programs
  - Writing a Program

- Electrical Design
  - 3 and 4-Way Switching
  - Design of Electrical Circuits
  - Magnetic Motor Control and the Code
  - LonWorks and Building Automation
  - Transformers and the Code

- Voice, Data and Video
  - Audio Distribution
  - CCTV Security Surveillance
  - Computer Networking
  - Fiber Optics
  - Telephonic Interconnect

- Industry Specific Skills
  - Solar Panel Installation
  - Solar Photovoltaics
  - Building Automation Systems
  - Confined Space Entry
  - Specialized Tools
  - Conduit Bending
  - Rigging and Lifting
  - Firestop Installation
  - Blueprints and Schematics
  - Work Flow and Resources
  - Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)
  - Understanding New Technologies and Changes to Industry Standards (Green Training)
  - Proper Equipment Set-Up (Green Training)
  - Safe Working Practices
  - Advanced Instrumentation and Motor Controls
  - Programmable Logic Controllers
  - Advanced Welding
  - Architecture Designs and Advanced Plan Reading
- Management and Monitoring of Materials
- Testing Materials and Equipment–Proper Set-Up and Use (Green Training)
- Understanding Changes to Industry Standards (Green Training)

- California Advanced Lighting Control Program (CALCTP)
  - Advanced Lighting Control Systems
  - Lighting Control Strategies
  - Line Voltage Switching Controls
  - Low Voltage Switching Control
  - Dimming Controls
  - Occupancy Sensors
  - Photosensors

- CALCTP Acceptance Testing
- Electric Vehicle Infrastructure Training Program

**BUSINESS SKILLS**
- Teambuilding Skills
- Green Awareness Training and Green Certifications
- Leadership Skills
- Customer Service Skills
- Conflict Resolution
- Problem Solving
- Decision Making Skills
- Inventory Checklist
- Advanced Time Management
- Filling Out Work Documents and Reports Accurately
- Project Management
- Creating Project Bids

**COMPUTER SKILLS**
- Auto Computer-Aided Design (AutoCAD)
- Job Tracking System
- Scheduling & Planning Jobs

**OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)**
- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)
APPRENTICE

Class/Lab Hours
8 – 210 (Job Number 2)

COMMERCIAL SKILLS

- Safety
  - General Job-Site Safety awareness
  - First Aid/CPR Certification
  - Emergency Procedures
  - Compliance with OSHA, NFPA and EPA Regulations
  - Substance Abuse Awareness

- Tools, Materials and Handling
  - Proper Care and Use of Hand and Power Tools
  - Proper Rigging Methods
  - Proper Digging Techniques
  - Proper Use of Motorized Equipment; Platform Lifts, Fork-Lifts and Bucket Trucks
  - Proper Material Lifting and Handling

- Math
  - Appropriate Mathematical Calculations to Solve for Related Problems

- Electrical Theory
  - Basic Electro-Magnetic Principals
  - Ohm’s Law
  - AC/DC Theory
  - Series, Parallel and Combination Circuits
  - Characteristics of Circuits; Voltage, Current, Power, Resistance, Impedance, Capacitance and Reactance
  - Theory of Superposition and Solving for Multiple Voltage-Sourced Circuits
  - Operation and Characteristics of Three-Wire Systems
  - Operation and Characteristics of Three-Phase Systems
  - Use of Electronics in the Electrical Industry
  - Code Requirements
  - National Electrical Code and Local Codes

- Conductors
  - General Characteristics
  - Conductor Installation Codes and Techniques
  - Methods for Selecting Proper Size and Type of Conductors

- Conduit and Raceways
  - Terms Associated with Conduits and Raceways
  - Procedures for Laying Out Various Types of Bends
  - Procedures for Making Proper Bends when Fabricating Conduits
  - Conduit Support Systems Recognized by Code

- First Aid/CPR
vented County Electrical JATF ET16-0911

- Lighting Systems
  - Function, Operation and Characteristics of Various Lighting Systems
  - Lighting Distribution and Layout

- Installation and Connection of Fixtures
  - Over-Current Devices
  - Function, Operation and Characteristics of Over-Current Protection Devices
  - NEC Requirements for Over-Current Protection Devices
  - NEC Requirements for Ground-Fault and Arc-Fault Protection

- Grounding Systems
  - Functions, Operation and Characteristics of Grounding Systems
  - Sizing, Layout and Installation of Grounding Systems
  - Insulation and Isolation
  - Proper Grounding and Bonding Techniques
  - Special Circumstances

- Services and Distribution Systems
  - Function, Operation and Requirements for Various Panel Boards and Switch Gear
  - Grounding Requirements
  - Code Requirements

- Prints and Specifications
  - Creation of Blueprints Plans and Specification
  - Use of Blueprints, Plans and Specification
  - Recognizing Information Contained within Blueprints

- Motors, Motor Controllers and Process Controllers
  - Function, Operation and Characteristics of Motors (AC, DC, Dual-Voltage)
  - Proper Motor Installations
  - Motor Controllers, Control Circuits and Control Devices
  - Control Transformers, Switches and Relays
  - Instrumentation, Process Control Systems and Devices

- Generation and Power Supplies
  - Principles of Generating electricity
  - Principles of Alternative Energy Generating Systems
  - Installation and Maintenance of Uninterruptible Power Supplies
  - Installation and Maintenance of Emergency Battery Systems

- Transformers
  - Function, Operation and Characteristics of Transformers
  - Selection and Installation of Transformer Types
  - Transformer Grounding Techniques
  - Harmonics and Power Quality

- Personal Development
  - Orientation to Organization and Structures
  - Working with Others
  - Personal Financial Development
- Electrical Testing
  - Steps Used for Various Testing Processes
  - Proper Selection and Use of Test Meters
  - Utilizing the Results of Testing Procedures

- Specialty Systems
  - Fire Alarms
  - Security Systems

- CALCTP
  - Advanced Lighting Control Systems
  - Lighting Control Strategies
  - Line Voltage Switching Controls
  - Low Voltage Switching Control
  - Dimming Controls
  - Occupancy Sensors
  - Photosensors

- Electric Vehicle Infrastructure Training Program

**OSHA 10 (OSHA CERTIFIED INSTRUCTOR)**
- OSHA 10 (requires completion of 10 hours)

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee in Job Number 1 and 210 total training hours per trainee in Job Number 2, regardless of the method of delivery.
Training Proposal for:
Orange County Electrical Joint Apprenticeship
and Training Trust Fund
Agreement Number: ET16-0913

Panel Meeting of: September 25, 2015
ETP Regional Office: San Diego  Analyst: S. Godin

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Priority Rate Retrainee Apprenticeship SET</th>
<th>Industry Sector(s):</th>
<th>Construction Green Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Counties Served:</td>
<td>Orange</td>
<td>Repeat Contractor:</td>
<td>Yes No</td>
</tr>
<tr>
<td>Union(s):</td>
<td>Yes No</td>
<td></td>
<td>International Brotherhood of Electrical Workers (IBEW) Local 441</td>
</tr>
<tr>
<td>Turnover Rate:</td>
<td>≤20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors:</td>
<td>(%) of total trainees</td>
<td>≤0%</td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL:

Please choose an option from the list below. Please choose the “BLANK” if N/A.

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>Support Costs</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$446,820</td>
<td>$31,005 8%</td>
<td>$477,825</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 50% of Total ETP Funding Required  Inherent
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineef Journeyman Priority Rate SET</td>
<td>Commercial Skills, Business Skills, Computer Skills, Continuous Improvement, OSHA 30</td>
<td>50</td>
<td>8-200</td>
<td>0</td>
<td>$564</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 24</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraineef Apprentice SET</td>
<td>Commercial Skills, OSHA 10</td>
<td>165</td>
<td>8-210</td>
<td>0</td>
<td>$2,725</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 196</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Minimum Wage by County: $20.55 per hour for SET Statewide priority industry.

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

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

Up to $4.10 per hour will be used to meet the required SET priority industry wage of $20.55 per hour in Job Number 2.

Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Number 1: Journeyman</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Inside Wireman</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Transportation Systems Installer</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Sound Technician</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Job Number 2: Apprentice</td>
<td>165</td>
<td></td>
</tr>
<tr>
<td>Inside Wireman</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Transportation Systems Installer</td>
<td>65</td>
<td></td>
</tr>
<tr>
<td>3rd year Sound Technician</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

* Wages vary by union local.

INTRODUCTION

Created in 1950, the Orange County Electrical Joint Apprenticeship and Training Trust Fund (OC/TTF or Trust) (www.ocett.org) is administered jointly between the Orange County Chapter of the National Electrical Contractors Association (NECA) and the International Brotherhood of Electrical Workers (IBEW) Local 441. The Trust is located in Santa Ana. Its mission is to
provide up-to-date industry skills training and secure high-quality job opportunities for Journeymen and Apprentices in three electrical occupations.

At present, the OC/TTF serves approximately 1,200 Journeymen and 189 Apprentices. The Trust administers funds for three apprenticeship programs under two different JAC’s:

Orange County Electrical JAC
- Inside Wireman
- Intelligent Transportation Systems

Orange County Sound Technician JAC
- Sound Installer

Approximately 191 employers are signatory to the three collective bargaining agreements. These employers perform specialized construction work related to the design, installation and maintenance of commercial and residential electrical systems.

This is the third agreement between ETP and OC/TTF in the last five years. The Trust reports that as a result of ETP funding it graduated seven apprentices in 2013 and 67 apprentices in 2014. OC/TTF anticipates that 42 apprentices will graduate in 2015. Both the Inside Wiremen and Transportation Systems apprenticeship programs are five years, and the Sound Technician Installer program is three years, in duration.

PROJECT DETAILS

Employer Demand for Training

Signatory employers and union representatives have identified the following reasons for Journeymen training: new energy efficiency regulations, the need to reduce costs to remain competitive, higher quality standards, the increasing complexity of construction projects, and a retiring workforce in Orange County. OC/TTF will provide training to workers for commercial, industrial and residential projects with local signatory contractors.

Current and upcoming Orange County construction projects include: Broadcom Commercial/Industrial Complex; Irvine Company 20 story high rise office building; Energy Center Gas Turbine Plant; Yorba Linda Power Plant; Source Complex Buena Park Hotel & high-rise office building; San Clemente Retail Plaza; Newport Mesa School District Solarization Project; multiple Kaiser Hospital solarization projects and numerous smaller commercial projects.

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 Panel adopted the Apprenticeship Training Program as a pilot in March 2012. It is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training.

Apprenticeships are a multi-year training program that results in DAS certification to work as a Journeymen. They are authorized in California under the Shelly-Maloney Apprenticeship Labor Standards Act of 1939. Apprentices commit to training under contract with an apprenticeship
program sponsor. They advance through a series of apprenticeship levels as they complete modules of RSI and on-the-job training. Wages are paid for hours worked on the job, in progression with a series of advancements up to the Journeyman level.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC) as here. A JATC is created through collective bargaining, with an equal number of members appointed by union and management contributions to a training trust fund. The employers are not “participants” but are signatories to the Collective Bargaining Agreement.

Depending on the type of trade, apprenticeship programs vary in length. As noted earlier, here there are two five year programs and one three year program. They also vary in size, ranging from less than 10 to several hundred apprentices at any given point in time. Several types of trainees are eligible under the Apprenticeship Program: Apprentices (second-year), Journeymen and Pre-Apprentices. First-year Apprentices are not eligible due to the higher drop-out rates associated with this entry-level.

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency; in this proposal the LEA is Palomar Community College. The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

Because ETP funding cannot displace another source of government funds, the fixed fee rate is reduced by $5.00 to account for adult education funding appropriated each year for Apprentice training through the California Community College Chancellor’s Office and Department of Education. This changes the ETP Priority Industry Rate from $18.00 to $13.00 per hour for all Apprentice Job Numbers.

In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26).

Under the Apprenticeship Training Program, the post-retention wage has been standardized to $20.55 per hour reflecting the Special Employment Training (SET) wage for Priority Industry. This wage was chosen for ease of administration, recognizing that most Apprentices and all Journeymen exceed the highest ETP wage requirements. However, if the actual rate is higher, it will be used, as is true here for Journeymen.
DAS Completion Rates

The average completion rate for Apprentices in the Electrical Industry is 66.3% as measured by DAS over the most recent five-year reporting period (CY2009 through CY2013). The DAS completion rates for OC/TTF were 65.75% for its Inside Wiremen and Transportation Installers and 61.79% for its Sound Installers, both of which exceed the benchmark of no less than 50% of the industry average.

Training Plan

OC/TTF will provide its journey workers with OSHA 10/30 and a variety of Business, Commercial and Computer skills training topics included in the Agreement’s menu curriculum. Apprentices will receive Standard Related and Supplemental Instruction (RSI) in addition to OSHA 10. All training is center-based and will be delivered at the Trust’s training center in Santa Ana.

Journeyman Training

Commercial Skills (80%)

Green training is expected to be the centerpiece of the program because of the demand for energy efficient construction methods and technologies by participating employers and property owners. Training will cover energy-efficient technologies and products such as green building materials, solar photovoltaic panels, new motor controls, advanced welding, green materials testing and audit equipment.

OC/TTF will also offer a new journey level certification class: Instrumentation. The Instrumentation class is a joint Electrical and Pipefitter class teaching electricians how to calibrate and install electrical wiring in pipes. The course is critical for journeymen working in high industrial areas and in water treatment plants.

Business Skills (5%) - Electricians must understand new national building codes and green practices; follow certification guidelines; use more collaborative bidding and project development practices; meet budgets; interact with other types of construction workers; and implement green solutions in traditional work environments. The proposed training will give trainees the tools to plan, organize, and manage construction projects more efficiently. Training will also include team-building and leadership skills so that electricians can lead teams in an effective and efficient manner.

Computer Skills (5%) - Training will include scheduling, planning and modeling software and AutoCAD and Job Tracking applications that provide trainees with the tools to modify blueprints, look up project requirements, build budgets and timelines, design virtual buildings, and adjust computerized control systems.

Apprenticeship Training

Commercial Skills (95%)

Inside Wiremen and Transportation System Installer Apprentices learn to install, maintain and repair various types of electrical and electronic equipment in commercial, industrial and residential establishments. They will also learn to install connect and test: electrical wiring systems for lighting, heating, air conditioning and communications in any building or structure.
Sound Installer Apprentices learn to install, maintain and repair limited energy monitoring, communication and signaling systems. These may include: fire alarm, telephone, computer networks, access control, security, closed captioned television (CCTV), video sound systems and other signal, traffic, and communications systems.

**Certified Safety Training**

**OSHA 10/30** (10% Journeymen; 5% Apprentices) – OSHA 10/30 training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of training for Apprentices and 10 or 30 hours for journeymen. The coursework is geared towards construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. This training provides a complete overview of occupational safety and health so that workers are more knowledgeable about workplace hazards.

**Green Technology**

Training will cover energy-efficient technologies and products such as green building materials, solar photovoltaic panels, new motor controls, climate energy efficiency and green materials testing and audit equipment. This training will help electrical workers hone the new skills and knowledge necessary to work in green construction in the Orange County area.

**Curriculum Development**

The Apprentice program uses the National Joint Apprenticeship and Training Committee’s Curriculum which was developed for the exclusive use of IBEW-NECA. The Journeyman upgrade Curriculum is employer-driven to meet the needs of signatory Orange County employers. The Curriculum was developed and customized with input from both labor and management representatives to address the local needs of union members, participating employers, and the industry as a whole.

**Trainer Qualifications**

OC/TTF employs a total of 15 full and part-time trainers. All trainers are former or current members of the trade and some have received Master Certification status by the National Joint Apprenticeship and Training Committee. All trainers are approved by Santiago Canyon College.

**Marketing and Support Costs**

OC/TTF conducts marketing through direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and its website. Class information is disseminated throughout the year to all apprentice and journeyman electricians within the jurisdiction, as well as to the electrical contractors who employ them.

Application announcements for the Apprenticeship program are disseminated to local, state and federal agencies as well as to local high schools and community colleges; and community based organizations.

Four staff persons in the OC/TTF office will assist with marketing, recruitment, needs assessments, and scheduling of classes. The Trust requests 8% support costs to fund its staff in recruiting and qualifying additional participating employers for this program. Many participating employers have already been recruited; however, additional recruitment and assessment activities are anticipated. Staff recommends the 8% support costs.
Commitment to Training

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. General safety training is provided by the signatory employers in accordance with all pertinent requirements under state and federal law.

Impact/Outcome

OC/TTF offers certification classes in topics such as Green Audits, Arc Flash Safety Awareness, OSHA 10/30, Instrumentation, Electric Vehicle Infrastructure (EVIT) and California Advanced Lighting Control Program (CALCTP).

Retention Modification

For occupations in which workers are hired for short-term jobs, retention may be satisfied by employment of at least 500 hours within 272 days; or alternatively, full-time at 35 hours per week with one employer for 90 consecutive days.

Tuition Reimbursement

OC/TTF represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. This representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by OC/TTF under an active ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees (Estimated)</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0918</td>
<td>$335,299</td>
<td>5/05/14-5/04/16</td>
<td>254</td>
<td>341</td>
<td>71</td>
</tr>
</tbody>
</table>

The Trust reports that training under this Agreement was completed by 6/11/15. The ETP tracking system shows that 26,419 eligible reimbursable hours have been delivered to 341 trainees. This equates to $412,449, more than 100% of the Agreement amount. The Trust anticipates close-out of this Agreement by CY 2015.

PRIOR PROJECTS

The following table summarizes performance by OC/TTF under a previous ETP Agreement that was completed within the last five years:
<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
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</thead>
<tbody>
<tr>
<td>ET13-0903</td>
<td>Santa Ana</td>
<td>09/04/12-09/03/14</td>
<td>$336,789</td>
<td>$336,789 (100%)</td>
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**DEVELOPMENT SERVICES**

California Labor Federation in Sacramento and Strategy Workplace in Oakland assisted with the development of this proposal at no cost.

**ADMINISTRATIVE SERVICES**

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

**TRAINING VENDORS**

None
Exhibit B: Menu Curriculum

Trainees will receive any of the following

Class Lab Hours
8-200 (Job 1 Journeyman)

COMMERCIAL SKILLS

Codeology
- National Electrical Code
- Other Recognized Standards (Installation Changes)
- Plan, Build, and Use
- Related Standards (Mandatory and Permissive Rules)
- Special Occupancies and Equipment
- Arc Flash

Analog/Digital Circuit (AC/DC) Principles
- Math for Electricians
- Ohm’s Law
- Generators
- Inductance/Reactance
- Series/Parallel Circuits

Grounding
- Grounding and Bounding
- National Electrical Code Article 100-Definitions and Provisions
- National Electrical Code Article 110-Requirements
- National Electrical Code Article 90-Introduction
- National Electrical Code Article Chapters 1-4
- Significant Changes to National Electric Code

Fire Alarm Systems and Installations
- Definitions and Systems
- Initiating Devices and Notification Systems
- National Electrical Code and Installation Requirements
- Start Up and Check Out Procedures
- National Fire Protection Act, 1972 (NFPA 72)

Fire Life Safety
- National Electrical Code (Relating to Fire Alarms)
- National Electrical Code Article 725
- National Electrical Code Article 760
- NFPA 72
- Principles of Electronics
Industrial Motor Control

- Control Relays and Timers
- Jogging and Plugging Controls
- Manual Starters and Magnetic Coils
- Push Buttons, Selector Switches, and Mechanical Devices
- Solid State Electronic Devices
- Variable Frequency Drives

Programmable Logic Control (PLC)
- Developing Ladder Programming
- Introduction to Programmable Equipment
- Programming Programmable Logic Controllers
- Using Timers and Counters in Logic Programs
- Writing a Program

Electrical Design
- 3 and 4-Way Switching
- Design of Electrical Circuits
- Magnetic Motor Control and the Code
- LonWorks and Building Automation
- Transformers and the Code

Voice, Data, and Video
- Audio Distribution
- CCTV Security Surveillance
- Computer Networking
- Fiber Optics
- Telephonic Interconnect

Industry Specific Skills
- Solar Panel Installation
- Solar Photovoltaics
- Building Automation Systems
- Confined Space Entry
- Specialized Tools
- Conduit Bending
- Rigging and Lifting
- Firestop Installation
- Blueprints and Schematics
- Work Flow and Resources
- Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)
- Understanding New Technologies and Changes to Industry Standards (Green Training)
- Proper Equipment Set-Up (Green Training)
- Safe Working Practices (Training is capped 10% of a trainee’s total hours)
- Advanced Instrumentation and Motor Controls
- Programmable Logic Controllers
- Advanced Welding
- Architecture Designs and Advanced Plan Reading
- Management and Monitoring of Materials
- Testing Materials and Equipment – Proper Set-Up and Use (Green Training)
- Understanding Changes to Industry Standards (Green Training)

CALCTP (California Advanced Lighting Control Program)
- Advanced Lighting Control Systems
- Lighting Control Strategies
- Line Voltage Switching Controls
- Low Voltage Switching Control
- Dimming Controls
- Occupancy Sensors
- Photosensors

CALCTP Acceptance Testing
Electric Vehicle Infrastructure Training Program (EVITP)
Instrumentation Certification

BUSINESS SKILLS

- Teambuilding Skills
- Green Awareness Training and Green Certifications
- Leadership Skills
- Customer Service Skills
- Conflict Resolution
- Problem Solving
- Decision Making Skills
- Inventory Checklist
- Advanced Time Management
- Filling Out Work Documents and Reports Accurately
- Project Management
- Creating Project Bids

COMPUTER SKILLS

- Auto Computer-Aided Design (AutoCAD)
- Job Tracking System
- Scheduling & Planning Jobs

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)
**Class/Lab Hours**
8 - 210 (Job 2 Apprentices)

**COMMERCIAL SKILLS**

Safety
- General job-site safety awareness
- First Aid/CPR Certification
- Emergency Procedures
- Compliance with OSHA, NFPA and EPA Regulations
- Substance Abuse Awareness

Tools, Materials and Handling
- Proper care and use of hand and power tools
- Proper rigging methods
- Proper digging techniques
- Proper use of motorized equipment; platform lifts, fork-lifts and bucket trucks
- Proper material lifting and handling

Math
- Appropriate mathematical calculations to solve for related problems.

Electrical Theory
- Basic electro -magnetic principals
- Ohm’s Law
- AC/DC Theory
- Series, Parallel and Combination Circuits
- Characteristics of circuits; voltage, current, power, resistance, impedance, capacitance and reactance.
- Theory of superposition and solving for multiple voltage-sourced circuits
- Operation and characteristics of three-wire systems
- Operation and characteristics of three-phase systems
- Use of electronics in the electrical industry
- Code Requirements
- National Electrical Code and Local Codes

Conductors
- General characteristics
- Conductor installation codes and techniques
- Methods for selecting proper size and type of conductors

Conduit and Raceways
- Terms associated with conduits and raceways
- Procedures for laying out various types of bends
- Procedures for making proper bends when fabricating conduits
- Conduit support systems recognized by Code
  First Aid/CPR

**Lighting Systems**
- Function, operation and characteristics of various lighting systems
- Lighting distribution and layout

**Installation and connection of fixtures**
- Over-current Devices
  - Function, operation and characteristics of over-current protection devices
  - NEC requirements for over-current protection devices
  - NEC requirements for ground-fault and arc-fault protection

**Grounding Systems**
- Functions, operation and characteristics of grounding systems
- Sizing, layout and installation of grounding systems
- Insulation and isolation
- Proper grounding and bonding techniques
- Special circumstances

**Services and Distribution Systems**
- Function, operation and requirements for various panel boards and switch gear
- Grounding requirements
- Code requirements

**Prints and Specifications**
- Creation of blueprints plans and specification
- Use of blueprints, plans and specification
- Recognizing information contained within blueprints

**Motors, Motor Controllers and Process Controllers**
- Function, operation and characteristics of motors (AC, DC, Dual-Voltage)
- Proper motor installations
- Motor controllers, control circuits and control devices
- Control Transformers, switches and relays
- Instrumentation, process control systems and devices

**Generation and Power Supplies**
- Principles of generating electricity
- Principles of Alternative Energy Generating Systems
- Installation and maintenance of uninterruptible power supplies (UPS)
- Installation and maintenance of emergency battery systems

**Transformers**
- Function, operation, and characteristics of transformers
- Selection and installation of transformer types
- Transformer grounding techniques
- Harmonics and power quality
- Personal Development
- Orientation to organization and structures
- Working with others
- Personal financial development

Electrical Testing
- Steps used for various testing processes
- Proper selection and use of test meters
- Utilizing the results of testing procedures

Specialty Systems
- Fire Alarms
- Security Systems

CALCTP
- Advanced Lighting Control Systems
- Lighting Control Strategies
- Line Voltage Switching Controls
- Low Voltage Switching Control
- Dimming Controls
- Occupancy Sensors
- Photosensors

Electric Vehicle Infrastructure Training Program (EVITP)
Job Site Management Skills

**OSHA 10 (OSHA CERTIFIED INSTRUCTOR)**
OSHA 10 (requires completion of 10 hours)

---

Note: Reimbursement for Job Number 1 training is capped at 200 total training hours per trainee. Reimbursement for Job Number 2 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA10 for a total of 210 hours. Safety training cannot exceed 10% of total training hours for any individual trainee. This 10% safety training cap does not apply to Hazardous Materials or OSHA 10/30 training.
Training Proposal for:
San Mateo County Electrical Apprenticeship and Training Committee

Agreement Number: ET16-0910

Panel Meeting of: September 25, 2015

ETP Regional Office: San Francisco Bay Area  Analyst: D. Woodside

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Apprenticeship Priority Rate</th>
<th>Industry Sector(s):</th>
<th>Construction</th>
<th>Green Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Priority Industry:</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

| County Served:       | San Mateo  | Repeat Contractor:           | Yes                 | No           |
|                      |            |                              |                     |              |

| Union:               | Yes        | No International Brotherhood of Electrical Workers Local 617 |
|                      |            |                                                              |

| Turnover Rate:       | ≤20%       |                                                              |
|                      |            |                                                              |

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

FUNDING DETAIL:

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>$395,800</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Costs</td>
<td>$27,360</td>
</tr>
<tr>
<td></td>
<td>8%</td>
</tr>
<tr>
<td>Total ETP Funding</td>
<td>$423,160</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 50% of Total ETP Funding Required  Inherent
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Journeyman Priority Rate</td>
<td>Commercial Skills, Business Skills, OSHA 10/30</td>
<td>75</td>
<td>8-200</td>
<td>0</td>
<td>$564</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 24</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retrainee Apprentice</td>
<td>Commercial Skills, OSHA 10</td>
<td>137</td>
<td>8-210</td>
<td>0</td>
<td>$2,780</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 200</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Minimum Wage by County:** SET/Priority Industry: $20.55 per hour

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

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

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journeyman Electrician/Inside Wireman</td>
<td></td>
<td>75</td>
</tr>
<tr>
<td>Apprentice Electrician/Inside Wireman</td>
<td></td>
<td>137</td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1947, the San Mateo County Electrical Apprenticeship and Training Committee (SMJATC) ([www.smjatc617.org](http://www.smjatc617.org)) is located in San Carlos. SMJATC is governed by a Board of Trustees comprised of four labor and four management representatives, and is a joint effort of the International Brotherhood of Electrical Workers (IBEW) Local 617 and train National Electrical Contractors Association (NECA).

ETP funding will be used to train both Journeymen and Apprentices, all of whom are members of IBEW Local 617. The union currently represents over 927 Electricians in San Mateo County. The JATC is dedicated to provide up-to-date industry skills training, and secure long-term, high wage job opportunities for its members. More than 40 employers are signatory to the collective bargaining agreement. Of these, 75% are small businesses.

This is SMJATC’s fourth ETP Agreement. The JATC reports that with the assistance of ETP funding, it graduated 24 Apprentices in 2015 and expects 21 Apprentices will graduate in 2016. SMJATC also reports that the number of registered Apprentices has increased by 40% since the approval of its current ETP Agreement. Continued high demand for training and the fact that the SMJATC has delivered enough training under its current Agreement to earn 100% of the funds, is driving SMJATC’s new funding request.

SMJATC is requesting funding for Apprentice and Journeyman training. Apprentices will receive training on the Related and Supplemental Instruction (RSI) curriculum, which is required to
become Journeymen Electricians. ETP funding will allow the SMJATC to expand its upgrade training for journeymen to meet the needs of local employers and property owners.

**Employer Demand for Training**

The Inside Wiremen install and maintain all of the various types of electrical and conduit systems found in commercial and industrial facilities. The proposed training program will help employers meet the challenges of staying competitive.

Participating employers and union representatives have identified the following additional reasons for training: new energy efficiency regulations, out-of-state competition, the need to reduce costs, higher quality standards, retiring workforce, and increasing complexity of construction projects.

Electricians, both Journeyman and Apprentices, will be working on new construction and upgrades of libraries, schools, and colleges in San Mateo County, the San Francisco International Airport, and other commercial and public works projects for such entities as CalTrain (the commuter train serving San Mateo County), which is implementing increased electrification of its trains. All training provides skills required by electricians to work on any electrical related function at any of these construction sites.

**Green Technology**

This training will provide electrical workers with skills in new and emerging technologies including renewable energy and highly efficient electrical control systems. Green technology continues to provide work for many electricians in retrofitting local commercial buildings with outdated power systems. The goal of building owners is to reduce the use of energy by these older buildings. The equipment rooms in these buildings often contain energized equipment such as hubs, file servers, or telephone switches. These devices are configured and connected to the communications network that serves the building, and must not be interrupted because of work performed by unqualified workers.

**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 Panel adopted the Apprenticeship Training Program as a pilot in March 2012. It is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training.

RSI is delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (LEA) (in this case, the College of San Mateo). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5.00, reducing the priority industry rate from $18 to $13 per hour. ETP wage for Apprentices
cannot be less than $20.55 per hour. This is the Special Employment Training Statewide for 2015 as modified for priority industries, which is used for ease of administration. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $20.55.

**DAS Completion Rates**

The completion rate for this DAS-approved program for 2009-2013 is 94.32% and exceeds the industry completion percentage of 66.13%. This meets Panel standards.

**PROJECT DETAILS**

All training is center-based training. The SMJATC training facility is newly remodeled and offers hands-on class/lab sessions in advanced lighting technology, fire alarm installations, data/voice installations and installation of the energy efficiency technology. Additionally, the training facility is equipped to provide the latest training on energy efficiency in an ever-changing environment of power conservation.

**Journeyman Training**

**Commercial Skills (80%)**: Green training will be the focus because of the demand for energy efficient construction methods and technologies by participating employers and property owners. Training will include energy-efficient technologies and products such as green building materials, solar photovoltaic panels, new motor controls, advanced welding, green materials testing and audit equipment.

**Business Skills (5%)**: Training will include new national building codes and green practices; following certification guidelines; using more collaborative bidding and project development practices; meeting budgets; interacting with other types of construction workers; and implementing green solutions in traditional work environments. This training will give workers the tools to plan, organize and manage construction projects. Training will also include team-building and leadership skills to lead teams in an effective and efficient manner. A new class is being added, Code of Excellence. This 20-hour class will be an expansion of the foreman class, but with a focus on leadership practices for non-foreman workers.

**OSHA 10/30 (15%)**: OSHA 10/30 training is typically delivered to workers in the building trades. This training is not required as a condition of doing business in California. However, the coursework must be approved by, and the instructors must be certified by Cal-OSHA. The vendor must also have a certified instructor present to confirm attendance.

Completion of the training results in a certificate that expands employment opportunities. To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10 or 30-hour course. OSHA 10/30 is not included in the 10% limitation on safety training.

**Apprenticeship Training**

This is a 5-year program. During the term of apprenticeship, a worker may work 8,000 hours on the job with various San Mateo County electrical contractors. In addition, Apprentices attend school two nights per week for five years, totaling 800 hours. An Apprentice Electrician works directly under the supervision of a qualified journeyman electrician in installing or maintaining a variety of approved wiring methods.
**Commercial Skills** (90%): Apprentices will learn to install, maintain and repair various types of electrical and electronic equipment in commercial, industrial and residential establishments. Training will also include how to install, connect and test: electrical wiring systems for lighting, heating, air conditioning and communications in any building or structure.

SMJATC has added two new classes to the 5th year apprentice curriculum: (1) new Code of Excellence class and (2) Foreman class. Although these classes are not yet included in the DAS curriculum, many employers demand that senior Apprentices take leadership roles. Leadership skills, such as taking initiative, guiding others and being self-driven, help keep an Electrician employed after the apprenticeship is over. Funding for this type of additional RSI is allowed under the ETP Apprentice Program.

**OSHA 10** (10%): This training provides an overview of occupational safety and health so that apprentices are more knowledgeable about workplace hazards and stringent safety standards in the electrical industry.

**Curriculum Development**

SMJATC, with input from both labor and management representatives, has developed and customized the national electrical curriculum to address local needs. The national program, or National Joint Apprenticeship and Training Committee's (NJATC) curriculum, was developed for the exclusive use of IBEW-NECA JATC's.

The national program was created over 58 years ago. Since then local programs affiliated with the NJATC have trained over 300,000 apprentices nationwide. NJATC works directly with equipment manufacturers and technology developers of a variety of tools, equipment and supplies, searching for the most up-to-date information available. Once a new training need has been identified, the NJATC designs an appropriate training course, provides instructor training, and distributes new training materials to local JATCs to help meet local employer training needs and requirements.

**Impact/Outcome**

Certifications earned for the Journeyman and Apprentice training include: OSHA 10, OSHA 30, Rigging and Lifting, Arc Flash Safety Awareness and Code of Excellence.

**Commitment to Training**

Signatory employers will continue to contribute 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.

- **Trainer Qualifications**

The JATC has 12 part-time trainers assisting with the training. The trainers are former or current members of the trade and some have received Master Certification status by the NJATC.

**Marketing and Support Costs**

Through direct mailings, informational flyers, personal contacts, telephone calls, public service announcements, emails, and the website, class information will be disseminated throughout the year to all Apprentice and Journeyman Electricians within San Mateo County as well as to the electrical contractors who employ them. Application announcements for the program are sent to
local, state and federal agencies as well as to local high schools and community colleges; community based organizations are also included in this effort (mailings and onsite job fairs).

Three staff people at the SMJATC office will assist with marketing, recruitment and employer needs assessments. SMJATC is requesting 8% support costs to fund recruiting and qualifying additional participating employers for this program. While many participating employers have already been recruited, additional recruitment and assessment activities must occur to support apprenticeship training. SMJATC reports that projected budget costs for personnel alone will exceed the ETP support cost funding. The JATC agrees to cover these additional costs. Staff recommends the 8% support costs.

**Tuition Reimbursement**

In accordance with Title 22, CCR, Section 4412.1, SMTT represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**CURRENT CONTRACT PERFORMANCE**

The following table summarizes performance by SMJATC under its current ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees Estimated</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET15-0907</td>
<td>$257,994</td>
<td>9/2/14 – 9/1/16</td>
<td>Apprentice-126</td>
<td>Apprentice-111</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Journeymen-60</td>
<td>Journeymen-82</td>
<td></td>
</tr>
</tbody>
</table>

Based on the ETP tracking system to date, 17,952 reimbursable hours have been tracked which equates to over 100% of the Agreement amount.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>Payment Earned %</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0912</td>
<td>San Carlos</td>
<td>10/29/12 – 10/28/14</td>
<td>$277,345</td>
<td>$274,299</td>
<td>(99%)</td>
</tr>
</tbody>
</table>

**DEVELOPMENT SERVICES**

California Labor Federation in Sacramento and Strategy Workplace in Oakland assisted with the development of this proposal at no cost.
ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A
Exhibit B: Menu Curriculum

Class/Lab Hours
8-200 (Job Number 1)

JOURNEYMAN

COMMERCIAL SKILLS

- Codeology
  - National Electrical Code
  - Other Recognized Standards (Installation Changes)
  - Plan, Build and Use
  - Related Standards (Mandatory and Permissive Rules)
  - Special Occupancies and Equipment
  - Arc Flash
- Analog/Digital Circuit (AC/DC) Principles
  - Math for Electricians
  - Ohm’s Law
  - Generators
  - Inductance/Reactance
  - Series/Parallel Circuits
- Grounding
  - Grounding and Bounding
  - National Electrical Code Article 100-Definitions and Provisions
  - National Electrical Code Article 110-Requirements
  - National Electrical Code Article 90-Introduction
  - Significant Changes to National Electric Code
- Fire Alarm Systems and Installations
  - Definitions and Systems
  - Initiating Devices and Notification Systems
  - National Electrical Code and Installation Requirements
  - Start Up and Check Out Procedures
  - National Fire Protection Act, 1972 (NFPA 72)
- Fire Life Safety
  - National Electrical Code (Relating to Fire Alarms)
  - National Electrical Code Article 725
  - National Electrical Code Article 760
  - NFPA 72
  - Principles of Electronics
- Industrial Motor Control
  - Control Relays and Timers
  - Jogging and Plugging Controls
  - Manual Starters and Magnetic Coils
  - Push Buttons, Selector Switches, and Mechanical Devices
  - Solid State Electronic Devices
  - Variable Frequency Drives
- Programmable Logic Control (PLC)
  - Developing Ladder Programming
  - Introduction to Programmable Equipment
  - Programming Programmable Logic Controllers
  - Using Timers and Counters in Logic Programs
• Writing a Program
  ➢ Electrical Design
    • 3 and 4-Way Switching
    • Design of Electrical Circuits
    • Magnetic Motor Control and the Code
    • LonWorks and Building Automation
    • Transformers and the Code
  ➢ Voice, Data and Video
    • Audio Distribution
    • CCTV Security Surveillance
    • Computer Networking
    • Fiber Optics
    • Telephonic Interconnect
  ➢ Industry Specific Skills
    • Solar Panel Installation
    • Solar Photovoltaics
    • Building Automation Systems
    • Confined Space Entry
    • Specialized Tools
    • Conduit Bending
    • Rigging and Lifting
    • Firestop Installation
    • Blueprints and Schematics
    • Work Flow and Resources
    • Proper Installation and Use of Testing and Auditing Materials and Equipment (Green Training)
    • Understanding New Technologies and Changes to Industry Standards (Green Training)
    • Proper Equipment Set-Up (Green Training)
    • Safe Working
    • Advanced Instrumentation and Motor Controls
    • Programmable Logic Controllers
    • Advanced Welding
    • Architecture Designs and Advanced Plan Reading
    • Management and Monitoring of Materials
    • Testing Materials and Equipment – Proper Set-Up and Use (Green Training)
    • Understanding Changes to Industry Standards (Green Training)
  ➢ California Advanced Lighting Control Program (CALCP)
    • Advanced Lighting Control Systems
    • Lighting Control Strategies
    • Line Voltage Switching Controls
    • Low Voltage Switching Control
    • Dimming Controls
    • Occupancy Sensors
    • Photosensors
  ➢ CALCTP Acceptance Testing
  ➢ Electric Vehicle Infrastructure Training Program (EVITP)
BUSINESS SKILLS

- Teambuilding Skills
- Green Awareness Training and Green Certifications
- Leadership Skills
- Customer Service Skills
- Conflict Resolution
- Problem Solving
- Decision Making Skills
- Inventory Checklist
- Advanced Time Management
- Filling Out Work Documents and Reports Accurately
- Project Management
- Creating Project Bids

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

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

APPRENTICE

Class/Lab Hours
8-210 (Job Number 2)

COMMERCIAL SKILLS

- Safety
  - General Job-Site Safety Awareness
  - First Aid/CPR Certification
  - Emergency Procedures
  - Compliance with OSHA, NFPA and EPA Regulations
  - Substance Abuse Awareness
- Tools, Materials and Handling
  - Proper Care and Use of Hand and Power Tools
  - Proper Rigging Methods
  - Proper Digging Techniques
  - Proper Use of Motorized Equipment; Platform Lifts, Fork-Lifts and Bucket Trucks
  - Proper Material Lifting and Handling
- Math
  - Appropriate Mathematical Calculations to Solve for Related Problems
- Electrical Theory
  - Basic Electro-Magnetic Principals
  - Ohm’s Law
  - AC/DC Theory
  - Series, Parallel and Combination Circuits
  - Characteristics of Circuits; Voltage, Current, Power, Resistance, Impedance, Capacitance and Reactance
  - Theory of Superposition and Solving for Multiple Voltage-Sourced Circuits
  - Operation and Characteristics of Three-Wire Systems
  - Operation and Characteristics of Three-Phase Systems
  - Use of Electronics in the Electrical Industry
- Code Requirements
- National Electrical Code and Local Codes
- Conductors
  - General Characteristics
  - Conductor Installation Codes and Techniques
  - Methods for Selecting Proper Size and Type of Conductors
- Conduit and Raceways
  - Terms Associated with Conduits and Raceways
  - Procedures for Laying Out Various Types of Bends
  - Procedures for Making Proper Bends when Fabricating Conduits
  - Conduit Support Systems Recognized by Code
- Lighting Systems
  - Function, Operation and Characteristics of Various Lighting Systems
  - Lighting Distribution and Layout
- Installation and Connection of Fixtures
  - Over-Current Devices
  - Function, Operation and Characteristics of Over-Current Protection Devices
  - NEC Requirements for Over-Current Protection Devices
  - NEC Requirements for Ground-Fault and Arc-Fault Protection
- Grounding Systems
  - Functions, Operation and Characteristics of Grounding Systems
  - Sizing, Layout and Installation of Grounding Systems
  - Insulation and Isolation
  - Proper Grounding and Bonding techniques
  - Special Circumstances
- Services and Distribution Systems
  - Function, Operation and Requirements for Various Panel Boards and Switch Gear
  - Grounding Requirements
  - Code Requirements
- Prints and Specifications
  - Creation of Blueprints Plans and Specification
  - Use of Blueprints, Plans and Specification
  - Recognizing Information Contained within Blueprints
- Motors, Motor Controllers and Process Controllers
  - Function, Operation and Characteristics of Motors (AC, DC, Dual-Voltage)
  - Proper Motor Installations
  - Motor Controllers, Control Circuits and Control Devices
  - Control Transformers, Switches and Relays
  - Instrumentation, Process Control Systems and Devices
- Generation and Power Supplies
  - Principles of Generating Electricity
  - Principles of Alternative Energy Generating Systems
  - Installation and Maintenance of Uninterruptible Power Supplies
- Installation and Maintenance of Emergency Battery Systems
  - Transformers
  - Function, Operation and Characteristics of transformers
  - Selection and Installation of Transformer Types
  - Transformer Grounding Techniques
  - Harmonics and Power Quality
- Workplace Development
  - Orientation to Organization and Structures
  - Working Well with Others
  - Financial Skills
- Electrical Testing
  - Steps Used for Various Testing Processes
  - Proper Selection and Use of Test Meters
  - Utilizing the Results of Testing Procedures
- Specialty Systems
  - Fire Alarms
  - Security Systems
- CALCTP
  - Advanced Lighting Control Systems
  - Lighting Control Strategies
  - Line Voltage Switching Controls
  - Low Voltage Switching Control
  - Dimming Controls
  - Occupancy Sensors
  - Photosensors
- Electric Vehicle Infrastructure Training Program
- Code of Excellence
  - Taking Initiative On the Job
  - Identifying and Completing Self-Driven Goals On the Job
- Foreman Training
  - Understanding Leadership Roles
  - Communicating Tasks and Expectations Clearly
  - Creating a Productive Work Environment

**OSHA 10 (OSHA CERTIFIED INSTRUCTOR)**
- OSHA 10 (requires completion of 10 hours)

Safety training cannot exceed 10% of total training hours for any individual trainee. This 10% safety training cap does not apply to OSHA 10/30 training.

Note: Reimbursement for Job Number 1 Journeymen retraining is capped at 200 total training hours per trainee regardless of the method of training delivery. Reimbursement for Job Number 2 Apprenticeship training is capped at 200 total training hours per trainee in Commercial Skills and 10 hours of OSHA10 for a total of 210 hours regardless of the method of training delivery.
Training Proposal for:

United Association Local Union 342 Joint Apprenticeship and Training Committee
Agreement Number: ET16-0914

Panel Meeting of: September 25, 2015

ETP Regional Office: San Francisco Bay Area  Analyst: D. Woodside

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes:</th>
<th>Retrainees</th>
<th>Apprenticeship</th>
<th>Priority Rate</th>
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<tbody>
<tr>
<td>Industry Sector(s):</td>
<td>Construction</td>
<td>Green Technology</td>
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Priority Industry: ☑ Yes ☐ No

<table>
<thead>
<tr>
<th>County Served:</th>
<th>Alameda, Contra Costa</th>
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<tbody>
<tr>
<td>Repeat Contractor:</td>
<td>☑ Yes ☐ No</td>
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</table>

Union: ☑ Yes ☐ No United Association of Journeymen and Apprentices of the Plumbing and Pipe Fitting Industry of the United States and Canada (Local 342)

Turnover Rate: ≤20%

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

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>$500,049</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Costs</td>
<td>$34,506  8%</td>
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</tbody>
</table>

$500,049 + $34,506 = $534,555

In-Kind Contribution: 50% of Total ETP Funding Required

Inherent
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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<tr>
<td>1</td>
<td>Retraine Apprentice</td>
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<td>Weighted Avg: 24</td>
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<td>$53.46</td>
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### Minimum Wage by County:
$20.55 per hour for SET Statewide priority industry.

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

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

### Wage Range by Occupation

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apprentice Plumber, Pipefitter, Steamfitter, Refrigeration Fitter/Air Conditioning Mechanic</td>
<td>297</td>
<td></td>
</tr>
<tr>
<td>Journeyman Plumber, Pipefitter, Steamfitter, Refrigeration Fitter/Air Conditioning Mechanic</td>
<td>150</td>
<td></td>
</tr>
</tbody>
</table>

## INTRODUCTION

The United Association Local Union 342 Joint Apprenticeship and Training Committee (UA Local 342 JATC) (www.ua342.org/training) trains Apprentices and Journeymen for the piping industry in Northern California. The JATC serves over 1,700 Journeymen and 350 Apprentices working primarily in Alameda and Contra Costa counties and various other northern California counties.

Employers are represented by the Industrial Contractors UMIC, Inc.; the Northern California Piping Contractors, the Mechanical Contractors Association of Northern California, the Air Conditioning & Refrigeration Contractors Association of Northern California; and the Residential Plumbing and Mechanical Contractors Association of Northern California. Workers to be trained are employed by a variety of firms, including plumbing and mechanical contractors, utility contractors, refineries, building and industrial plant owners, utility and pipeline companies.

The UA Local 342 JATC operates a 45,000 square-foot, fully equipped Training Center located in Concord where all ETP-funded training will occur. The Training Center offers apprentice programs (Plumber, Pipefitter, Steamfitter, Refrigeration Fitter and Air Conditioning Mechanic) registered through the DAS. Funding for Journeymen training will allow the JATC to offer specialized training leading to certifications that are nationally recognized in the pipe trades industry. This will be the Panel’s second Agreement with this JATC.
Plumbers service, repair, and remodel existing plumbing systems in residential, commercial, and industrial buildings. Refrigeration and air conditioning mechanics install and retrofit all types of refrigeration equipment, from small air conditioning systems to HVAC units used in hospitals, schools, and other complex installations. Steamfitters/pipefitters are responsible for designing and installing complex heating systems, and special piping for acid, gas, oil, air, oxygen, nitrogen, and ultra-high-purity water and gas systems.

**Employer Demand for Training**

Employers need training to acquire an adequate number of skilled craftsmen to work in specialized jobs and to replace retiring baby boomers. There is a national shortage in the pipe trades industry, especially for welders. There is also a shortage of workers trained in energy efficient “green” building technologies and procedures. For example, most motors and pumps that are mechanically operated now have variable frequency drivers that ramp up the motor only when it is needed. The demand for workers skilled in such green building systems is especially true in California where the California Building Energy Efficiency Standards, also known as Title 24, require higher levels of efficiency for all building and construction trades. These standards mandate that California reduce its greenhouse gas emissions to 1990 levels by 2020.

Demand for trained workers in oil refineries is increasing as a result of SB 54, which requires that an increasing percentage of refinery workers be registered Apprentices or graduates of apprenticeship programs. PG&E also has begun a massive program of replacing gas pipelines throughout Northern California that will require more pipe trades workers.

In addition, the trade itself is changing. Work is becoming more complex and workers are expected to be more productive. New systems require fewer people to complete a job, but each person must be better trained.

**Apprenticeship Program**

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the program is five years, for all four occupational titles.

Apprentice programs are typically sponsored by a Joint Apprenticeship Training Committee (JATC). A JATC is created through collective bargaining, with an equal number of members appointed by union and management with employer contributions to a training trust fund. The employers are not “participants” but are signatories to the Collective Bargaining Agreement.

RSI is traditionally delivered as class/lab, and ETP does not reimburse CBT delivery for apprenticeship training. The curriculum is developed with input from DAS and a designated Local Educational Agency (in this case Diablo Valley College). The Apprenticeship Program allows reimbursement for up to 200 hours of RSI plus OSHA10, per-apprentice. (Journeymen are capped at 200 hours.) The trainer-to-trainee ratio for Apprentices is 1:25 and 1:20 for Journeymen.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less...
than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by $5.00, reducing the priority industry rate from $18 to $13 per hour. In addition, the Panel adopted a “blended rate” for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤100 employees). This is $22 per hour, midway between the Priority Industry standard rate ($18) and Small Business rate ($26).

The ETP wage for Apprentices is no less than $20.55 per hour, tracking the Special Employment Training wage as modified for priority industries. However, the actual wages paid are shown in the Training Plan Table and contract when they exceed $20.55, for both Apprentice and Journeymen.

**DAS Completion Rates**

The completion rate for this DAS-approved program for the most recent five year period (2009-2013) is 49.05% and exceeds the industry completion percentage of 48.01% for that same time period. This meets Panel standards.

**PROJECT DETAILS**

**Training Plan**

*Commercial Skills* (95%): Training will be offered to all occupations. Coursework includes skills in valve repair, medical gas installation, welding, refrigerant handling, industrial rigging, foreman skills, geothermal systems, green awareness, and instrumentation. Training provides workers and employers with the skills they need to win bids and complete jobs quickly and with the highest quality workmanship.

Apprentices receive 108 hours of instruction in an 18-week semester. The JATC reports that it has 300 apprentices eligible for this project. If all 300 apprentices complete 108 hours of training in one semester, the amount allocated for apprentice training in this proposal may be earned in six months. Journey level training will be completed within the same period.

Training proposed in this application will give journeymen skills in valve repair, medical gas installation, welding, refrigerant handling, industrial rigging, foreman skills, geothermal systems, green awareness, instrumentation, and field computer systems. This specialized training leads to certifications that are recognized nationally in the pipe trades industry.

**Certified Safety Training**

*OSHA 10/30* (5%): Journeymen will receive OSHA 10/30. Apprentices will only receive OSHA 10. This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hos of classroom or CBT training for Journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.
Curriculum Development

The curriculum is employer-driven and employer representatives provide direct input based on local industry needs. Thus, hiring demands result in a comprehensive and technically advanced curriculum based on feedback received directly from the employers and union representatives. Input is based on workplace performance, requests of customers, and needs of the industry as well as student course evaluations completed at the end of each course.

Electronic Recordkeeping

Staff has approved the JATC’s use of a Learning Management System for recordkeeping.

Impact/Outcome

Certifications earned may include various welding certifications such as medical gas installation systems, backflow testing, tube bending, National Inspection Testing Certifications for Pipefitters and Plumbers, and OSHA 10/30.

Marketing and Support Costs

UA Local 342 JATC requests 8% support costs to assist in trainee recruitment, employer outreach and assessment of employer-specific job requirements.

The Apprenticeship program is marketed through the various employer associations in Northern California. Employers are notified of training through association websites, mailings, and presentations. Training is then designed around employer’s needs and the overall need of the industry. The JATC will also disseminate class information throughout the year to all Journeyman pipe trades workers within the local’s jurisdiction. Marketing is thus conducted through newsletters, personal contacts, telephone calls, the Internet, emails, and the JATC’s website.

Certain employers have already been recruited; however, additional recruitment will take place to complete the project and replace any employers whose training needs change since the project planning process began. Assessment of employer-specific job requirements will continue during the contract term. The JATC requests, and staff recommends, the 8% support costs used for these purposes.

Commitment to Training

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. General safety training is provided by the signatory employers in accordance with all pertinent requirements under state and federal law.

Tuition Reimbursement

In accordance with Title 22, CCR, Section 4412.1, UA Local 342 JATC represents that students enrolled in the ETP-funded program will not be charged tuition, fees, or any other costs associated with training. The representation will be made a condition of the Agreement.

RECOMMENDATION

Staff recommends approval of this proposal.
**CURRENT CONTRACT PERFORMANCE**

The following table summarizes performance by UA Local 342 JATC under its current ETP Agreement:

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Approved Amount</th>
<th>Term</th>
<th>No. Trainees Estimated</th>
<th>No. Completed Training</th>
<th>No. Retained</th>
</tr>
</thead>
</table>

All training has ended under this Agreement. Based on the ETP tracking system, 41,179 reimbursable hours have been tracked (over 100% of the Agreement amount).

**DEVELOPMENT SERVICES**

Steve Duscha Advisories in Sacramento assisted with development of this proposal for a flat fee of $10,000.

**ADMINISTRATIVE SERVICES**

Steve Duscha Advisories will also perform administrative services for a fee not to exceed 12.2% of payment earned.

**TRAINING VENDORS**

N/A
Exhibit B: Menu Curriculum

Apprentice Training

Class/Lab Hours
8 - 210

Trainees may receive any of the following:

COMMERCIAL SKILLS
Refrigeration Fitter/Air Conditioning Mechanic:
- Beginning Electrical Theory
- Mechanical Refrigeration Theory
- Electrical Theory/Beginning Schematics
- The Refrigeration Cycle
- Intermediate Electrics I
- Intermediate Mechanical Refrigeration I
- Intermediate Electrical II
- Intermediate Mechanical Refrigeration II
- Electrical Troubleshooting I
- Electrical Troubleshooting II
- Introduction to Direct Digital Controls
- Introduction to Variable Frequency Drivers
- Introduction to Market Refrigeration Systems
- Introduction to Pneumatic Controls
- Introduction to Boilers
- Advanced Compressor and Motor Theory
- Start Test Balance: Water Side I
- Start Test Balance: Air side I
- Start Test Balance: Water Side II
- Start Test Balance: Air Side II

Plumber/Pipefitter:
- CPR
- Trade Mathematics
- Computers in the Field
- Water Supply Systems
- Sewage Disposal
- Plumbing System Service and Repair
- Construction Management in Plumbing
- Medical Gas Systems
- Related Science in the Piping Trades
- Beginning Drawing & Plan Reading for the Piping Trades
- Advanced Drawing in the Piping Trades
- Plumbing Tool Workshop I
- Plumbing Tool Workshop II
- Plumbing Code I
- Plumbing Code II
- Welding for Plumbers
- Electricity for Plumbers
- Gas Installation in Plumbing
- Backflow Prevention
- Plumbing Fixtures
- Certification Preparation
Steamfitter:
- CPR
- Trade Mathematics
- Computers in the Field
- Use and Care of Tools
- Welding Safety/Plate Welding
- Oxygen/Acetylene Cutting
- Pipe Shop I
- Pipe Shop II
- Related Science in the Piping Trades
- Beginning Drawing and Plan Reading for the Piping Trades
- Advanced Drawing in the Piping Industry
- Instrumentation 1
- Instrumentation 2
- Steam Systems
- Electricity for Steamfitting
- Industrial Rigging
- Beginning AutoCAD
- Advanced AutoCAD
- Pumps
- Tube Bending
- Pipe Welding 1
- Welding 5
- Welding 6
- Welding 7
- Welding 8
- Welding 9
- Welding 10
- Orbital Welding
- Construction Management in Steamfitting

**OSHA 10** (Certified OSHA Instructor)

- OSHA 10 (requires completion of 10 hours)

**Journeymen Training**

**Class/Lab Hours**
8-200

Trainees may receive any of the following:

**COMMERCIAL SKILLS**
- Auto CAD
- Advanced Drawing (Pipe Drafting)
- Advanced Plan Reading
- Basic Electricity
- Beginning Instrumentation
- Blueprint Reading
- Boiler
- Brazing
- Crane Operations
- Handling Refrigerants
- Construction Management
Detailing
Diametrics
Downhill Welding
Drawing
Foreman Training
Gas
Gas Installations (Plumbing)
Hand Fusion
HVAC Theory
Industrial Instrumentation (Tube Bending)
Instrumentation
Med Gas
Med-Gas Installer/Brazer (For UA Certification)
MIG
Orbital Welding
Plumbing Code
Plumbing Fixtures & Appliances (Plumbing)
Polyvinylidene Fluoride Products
Rigging
Signal Person
Tig & Fusion Welding
Trimble
Tube Bending
Variable Speed
Water Supply

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

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

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

**Note:** Reimbursement is capped at 210 total training hours per Apprentice trainee and 200 total hours for Journeymen regardless of the method of delivery.
Retraineer - Job Creation  
Training Proposal for:  
Beth Incorporated dba Fix Auto Downtown LA  
Small Business ≤ $50,000  
ET16-0174  
Approval Date: September 3, 2015  
ETP Regional Office: North Hollywood  
Analyst: M. Paccerelli  
CONTRACTOR  
- Type of Industry: Services  
  Priority Industry: ☐ Yes ☒ No  
- Number of Full-Time Employees  
  California: 35  
  Worldwide: 35  
  Number to be trained: 42  
  Owner: ☒ Yes ☐ No  
- Out-of-State Competition: No OSC  
- Special Employment Training (SET): ☒ Yes ☐ No  
- High Unemployment Area (HUA): ☒ Yes ☐ No  
- Turnover Rate: 7%  
- Repeat Contractor: ☐ Yes ☒ No  
FUNDING  
- Requested Amount: $49,588  
- In-Kind Contribution: $34,145
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Business Skills, SET</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Imp., Hazardous Mat., PL-Comm Skills</td>
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</table>

- Reimbursement Rate: Job #’s 1 & 2: $22 SB Non-Priority
- County(ies): Los Angeles
- Occupations to be Trained: Administrative Staff, Technician, Estimator, Parts/Production Staff, Manager, Owner
- Union Representation: □ Yes  ☒ No
- Health Benefits: Job #’s 1 & 2: $2.04 per hour

SUBCONTRACTORS

- Development Services: Synergy Management Consultants, LLC in Grass Valley assisted with the development of this project for a flat fee of $3,000.
- Administrative Services: Synergy Management Consultants, LLC will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

INTRODUCTION

Beth Incorporated dba Fix Auto Downtown LA (FADLA) (www.fixautousa.com/downtown-la) is an automotive collision repair company located in Downtown Los Angeles. The Company offers collision repair services and auto repair parts and accessories sales.

Need for Training

FADLA’s must retrain its workers in response to ongoing automobile industry changes in the processes and materials used to manufacture vehicles. Many of these changes are being
implemented to ensure that vehicles meet Corporate Average Fuel Economy standards. Key areas of training will include the repair of newer aluminum vehicles, automobiles that utilize metals such as Boron and ultra-high strength steels and composites, as well as how to properly assess damages related to newer technology vehicles.

The Company must also provide its Technicians comprehensive, industry-specific training pertaining to Inter-Industry Conference on Auto Collision Repair, Automotive Service Excellence, and Original Equipment Manufacturer credentials required by most insurers and vehicle manufacturers.

**Job Creation**

FADLA has undertaken an aggressive growth strategy to build existing market share by obtaining new Insurer Direct Repair Program (DRP) contracts. Recently, FADLA acquired DRP contract with State Farm and is currently waiting for the executed DRP contract with USAA insurance for military personnel and their families. This program will result in a significant insurance claims volume which will require hiring new employees.

The Company has committed to hiring seven new employees at all locations (Job Number 2). The new positions will fill needs in the Technician, Estimator, Administrative Staff and Parts Staff occupations.

The Panel offers incentives to companies that commit to hiring new employees. Trainees will be subject to a lower post-retention wage. The Company represents that the date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. The Company also represents that these trainees will be hired into “net new jobs” as a condition of contract.

**Training Plan**

**Business Skills** – Training will be provided to Administrative Staff, Estimators, Managers and Owners. The training will focus on customer care skills, advanced sales, marketing skills and communication skills to improve overall customer satisfaction and increase sales.

**Commercial Skills** - Training will be provided to Technicians, Estimators, Managers, Parts/Production Staff and Owners. The training goal is to update worker knowledge of the materials used in today’s vehicles and to obtain certifications authorizing the Company to service additional automotive brands.

**Computer Skills** - Training will be provided to all occupations and will focus on job specific software programs. The collision repair industry is in process of transitioning to a paperless environment and staff will receive training in all necessary software programs to properly exchange data with insurers and other partners.

**Continuous Improvement** - Training will be provided to Technicians, Estimators and Managers to improve efficiencies and to reduce waste. A Lean quality and production improvement system is being instituted and efficiencies are expected to increase by 15% with training.

**Hazardous Materials** - Training will be provided to Technicians, Estimators and Managers to ensure that hazardous materials are handled and disposed of properly. This is not the full HazMat curriculum as would be required for certification, but training will be conducted by qualified trainers.
**Productive Lab**

Productive Lab (PL) training in Commercial Skills will be provided to Technicians and Estimators to supplement Class/Lab training. The delivery of PL training is necessary as trainees will be given real life projects to work. This will strengthen trainees’ understanding of how to complete automotive collision repair services. Training for Technicians will mainly focus on updates to industry changes. Estimators training will focus on the correct diagnosis of damage and properly working through documentation, insurance and pricing processes.

The PL training will complement the class/lab training modules listed in the curriculum. Approximately 26 Technicians and Estimators will receive up to 19 PL hours. Upon completion of PL training, the trainees will continue to receive on-the-job training at company expense.

Majority of the PL training will have a trainer-to-trainee ratio of 1:1, but there will be approximately 5% of PL with 1:3 ratio depending on the process and equipment covered in the training. For instance, in the PL Body Filler Methods process, a team of three will be stationed around a full-size vehicle. Each trainee will repair a medium-sized dent on one of the vehicle’s steel panels. The trainer is able to give instruction, observe, correct, and provide real time feedback while the team of three simultaneously repairs the vehicle. The trainers will be in-house subject matter experts exclusively dedicated to instruction for the entire reported training time. The trainers will be subject matter experts exclusively dedicated to instruction for the entire reported training time.

The tasks and competencies associated with the proposed PL training support the Company’s expressed business needs for training. Training assignments will include collision repair and painting, body filler methods, structural resistance spot welding, mig brazing techniques, color tinting, spraying/blending techniques, measuring vehicle structures, alignment process for unitized and full frame vehicles, and aluminum repair. Trainees will be certified competent on the task assigned by the trainers at the conclusion of PL training.

**SET/HUA**

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period. However, trainees working in a High Unemployment Area (HUA) are allowed to qualify at the ETP Standard Minimum Wages.

- **Wage Modification**

The 35 trainees in Job Number 1 work in an HUA with unemployment exceeding the state average by at least 25%. FADLA’s facility in Los Angeles is in an HUA and these trainees qualify for the ETP minimum wage of $15.97 rather than the Statewide Average Hourly Wage of $27.40. FADLA has requested this wage modification.

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-60  Trainees may receive any of the following:

**BUSINESS SKILLS**
- Customer Care Skills:
  - Customer Retention
  - Customer Engagement
  - Customer Relationship Building
- Advanced Sales & Marketing Skills:
  - Prospecting & Closing
  - Sales Account Management
  - Advanced Closing Techniques
  - Sales Procedures & Strategies
- Negotiation Skills
- Conflict Resolution
- Communication Skills
- Presentation Skills

**COMMERCIAL SKILLS**
- I-CAR Collision Repair Certification Skills
- Refinishing Skills:
  - Trim & Hardware
  - Surface Preparation
  - Vehicle Priming/Sealing
  - Paint Spray Guns Maintenance & Set-Up
  - Corrosion Protection Process
  - Sand, Buff & Detail
  - Color Theory & Tints
  - Blending Techniques
  - New Technologies
- Structural Repair:
  - Unibody Alignment
  - Three Dimensional Measuring
  - Repair & Replacement of Outer Body Panels
  - High Strength Steels
  - Aluminum Repair Processes
  - MIG Welding Skills
  - Straightening Structural Damage
  - Glass Replacement
  - Pillars, Rocker Panels, Rails, Front Structures & Floor Pan Replacement
  - Heating Cooling and AC Systems
  - Steering & Suspension Systems
  - Advanced Vehicle Systems
  - Composite Materials & Bonding Techniques
- Non-Structural Vehicle Repair Skills:
  - Remove & Install Trim & Hardware
  - Adhesive Bonding
  - Diagnose Wind Noise & Water Leaks
- Aluminum Cosmetic Damage
- Spot Welding
- Composite Repair

Estimating Skills:
- Steering & Suspension System Damage Analysis
- Damage on Non-Drivable Vehicles
- Electrical/Mechanical Systems
- Stationary Glass
- Advanced Materials
- Advanced Vehicle Systems

Vehicle Operation, Maintenance & Troubleshooting
Alternative Fuel & Hybrid Vehicle Repair Diagnostics
Service Procedures & Scheduling
Product Knowledge
Original Equipment Manufacturer Knowledge/Skills

COMPUTER SKILLS
CCC One Software:
- Job Costing
- Production Flow
- Production Planning - ETA Times & Dates
- Internal & External Customer Communication

Michell & Michell Repair Center Software
CCC Info Systems Software
Alldata Software
Microsoft Office Suite

CONTINUOUS IMPROVEMENT
Leadership Skills
Teambuilding
Root Cause Analysis
Kaizen Event Strategy & Implementation
Lean Concepts
Process/Quality Improvement
Problem Solving/Decision Making Skills
Inventory Control
Standard Operating Procedures

HAZARDOUS MATERIALS
Completing Material Safety Data Sheets
Volatile Organic Compound Tracking
Emergency Clean-Up
Registration, Evaluation, Authorization & Restriction of Chemical Substances

PL Hours
0 – 19

COMMERCIAL SKILLS (RATIO 1:3)
- Body Filler Methods
- Structural Resistance Spot Welding
- MIG Brazing Techniques
- Color Tinting
- Spraying/Blending Techniques
• Measuring Vehicle Structures
• Alignment Process for Unitized Vehicles
• Alignment Process for Full Frame vehicles
• Aluminum Repair
• Technical Estimating
• Estimatics DRP (Direct Repair Program)
• Estimating System Software

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. PL is capped at 19 hours per-trainee.
Training Proposal for:
D.T. Mattson Enterprises, Inc. dba Pro-Line Racing

Small Business ≤ $50,000
ET16-0197

Approval Date: September 14, 2015
ETP Regional Office: San Diego

CONTRACTOR

- Type of Industry: Manufacturing

- Number of Full-Time Employees
  - California: 48
  - Worldwide: 48
  Number to be trained: 30

- Priority Industry: ☑ Yes ☐ No
- Owner: ☑ Yes ☐ No
- Out-of-State Competition:
- Special Employment Training (SET): ☐ Yes ☑ No
- High Unemployment Area (HUA): ☐ Yes ☑ No
- Turnover Rate: 0%
- Repeat Contractor: ☑ Yes ☐ No

FUNDING

- Requested Amount: $39,780
- In-Kind Contribution: $46,453
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100 Priority Rate</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills</td>
<td>30</td>
<td>8 - 60</td>
<td>0</td>
<td>$1,326</td>
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</tbody>
</table>

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): Riverside
- Occupations to be Trained: Administrative Support, Sales/Marketing, Design, Production, Supervisor/Manager, Owner
- Union Representation: Yes ☐ No ✓
- Health Benefits: Job #1: $0.87 per hour

**SUBCONTRACTORS**
- Development Services: Training Funding Source (TFS) in Seal Beach will assist with development of this proposal for a flat fee of $2,900.
- Administrative Services: TFS will also assist with administration for a fee not to exceed 13% of earned funds.
- Training Vendors: To Be Determined

**OVERVIEW**

Founded in 1982, D.T. Mattson Enterprises, Inc. dba Pro-Line Racing (Pro-Line) (<www.prolineracing.com>) designs and manufactures wheels, tires, accessories, and bodies of 1/10-scale radio-controlled (RC) cars and trucks. Located in Banning, the Company's proprietary manufacturing processes, custom-blended raw materials, and in-house developed tooling, provides high quality RC accessories to race car owners and enthusiasts. This is Pro-Line’s third ETP Agreement, the first within the last five years.

The RC market is extremely competitive and can shift dramatically. Pro-Line’s direct competitors outsource the majority of their manufacturing and labor, reducing product costs. While striving to remain competitive, Pro-Line is also diligent in making products in the United States. In order to maintain its place in the RC industry, Pro-Line must keep up with the most innovative tools and methods to design and create its products. Advancement in technology has required the Company to purchase new equipment and upgrade software systems such as Tensile Textile Model #3345, LP100 Laser System, Starship, Inventory Advisor Module (add-on), as well as a new automated inventory system acquired in July. As a result, Pro-Line must
provide its workers with comprehensive training to successfully utilize the Company’s new and upgraded equipment and software systems’ full capability.

To accommodate these changes, the Company is in the process of remodeling and reorganizing the layout of its facility for efficient staff work flow. Consequently, Pro-Line has developed Lean training initiatives to assist in daily improvements throughout the organization. Pro-Line is committed to train daily on Two-Second Lean which aims to improve manufacturing strategies to reduce cost, thereby, allowing the Company to remain competitive.

ETP funding will enable Pro-Line to continue to provide high-quality, cost-effective RC products to its customers. Most specifically, ETP-funded training will provide the Company with the skill sets needed to remain current with technology, improve manufacturing efficiencies, increase production levels, and continue to grow as a California manufacturer in the RC market.

Training Plan

Pro-Line is committed to extensive training to ensure the Company has the appropriate skill base to address technological and manufacturing process issues to reduce cost and remain competitive. Training in the following skills will promote substantial investment in employee development to maintain a highly skilled workforce to support business growth:

**Business Skills** – Training will be provided to Administrative Support Staff, Sales/Marketing Staff, and Supervisor/Manager. Training in Lead with Purpose and Leadership Skills will provide Administrative Support Staff, Supervisors, and Managers the skills to successfully motivate other staff and support other job functions within the Company. Sales Staff will benefit from sales training to improve timeliness in generating new inquiries and opportunities that result in increased sales revenues.

**Computer Skills** – Training will be provided to all occupations. Trainees will learn full capabilities of the Company’s CRM and ERP systems to improve company-wide operational processes. The Company will focus on delivering training in the newly-purchased software system, Starship, to provide shippers (Production Staff) the skills to better control shipping options and become more efficient. Inventory Management and Control (Advisor Module Add On) training will be provided to Production Staff to better manage inventory to streamline processes and increase efficiencies. Training in Social Media platforms will enable Sales, Design, and Administrative Support Staff to effectively connect with the RC racing community and gain new customers.

**Continuous Improvement** – Training will be offered to all occupations. Course topics in Two-Second Lean, Plant Layout and Flow Analysis, Scrap Reduction Techniques, and Set-Up Minimization will provide trainees the skills to identify improvement opportunities to enhance efficiencies within and across departments in order to reduce operating costs and increase growth in profits.

**Manufacturing Skills** – Training will be offered to Production Staff and Supervisor/Manager. Training in new and existing equipment as well as manufacturing processes and procedures will allow trainees to improve and increase their abilities to process new materials using new methodologies necessary to support increased sales. Course topics include CNC Processes, Good Manufacturing Practices, Raw Materials, Equipment Maintenance, and Tool Design & Production.
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

- Lead With Purpose
- Leadership Skills
- Sales Skills
- Team building Techniques

COMPUTER SKILLS

- Adobe
- Autodesk
- Customer Relationship Management System
- Dreamweaver
- Enterprise Resource Planning (ERP)
- Flash/Cascading Style Sheets (CSS)
- Inventory Management and Control Application
- Microsoft Office
- Solidworks
- Starship
- Social Media
- Paperless Solution

CONTINUOUS IMPROVEMENT

- 2-Second Lean Principles
- Metric Development and Maintenance
- Plant Layout and Flow Analysis
- Research and Development System
- Scrap Reduction Techniques
- Set Up Minimization

MANUFACTURING SKILLS

- Computer Numerical Control (CNC) Processes
- Injection Molding
- Electrical Equipment
- Good Manufacturing Practices
- Equipment Maintenance & Troubleshooting
- Raw Materials
- Rubber Chemistry and Properties
- Thermoforming
- Tool Design & Production

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
Retraine - Job Creation
Training Proposal for:
Engineered Well Service International Inc.

Small Business ≤ $50,000
ET16-0171

Approval Date: September 2, 2015
ETP Regional Office: North Hollywood

CONTRACTOR
- Type of Industry: Services
- Priority Industry: Yes
- Number of Full-Time Employees
  - California: 95
  - Worldwide: 95
  - Number to be trained: 67
- Out-of-State Competition: Yes
- Special Employment Training (SET): Yes
- High Unemployment Area (HUA): Yes
- Turnover Rate: 10%
- Repeat Contractor: Yes

FUNDING
- Requested Amount: $49,808
- In-Kind Contribution: $45,000
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Retraine SB &lt;100</td>
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<td>Retraine SB &lt;100</td>
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<td>3</td>
<td>Retraine SB &lt;100</td>
<td>Business Skills, Commercial Skills, Computer Skills, Cont. Imp., Hazwoper, OSHA 10/30, PL-Commercial Skills</td>
<td>15</td>
<td>8-60 0</td>
<td>$880</td>
<td>$12.33</td>
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</table>

- **Reimbursement Rate:**
  - Job #1-3: $22 SB Non-Priority

- **County(ies):**
  - Kern, Los Angeles, Ventura

- **Occupations to be Trained:**
  - Rig Operator, Driver, Administration Staff, Rig Assistant, General Laborer, Supervisor, Manager, Tier I & II Rescue Staff, Owner

- **Union Representation:**
  - □ Yes
  - ☒ No

- **Health Benefits:**
  - Job #1: $2.25 per hour Job #3: $1.31 per hour

## SUBCONTRACTORS

- **Development Services:**
  - Strategic Business Solutions, LLC in Visalia assisted with development for a flat fee of $3,487.

- **Administrative Services:**
  - Strategic Business Solutions will also provide administrative services for a fee not to exceed 7% of payment earned.

- **Training Vendors:**
  - To Be Determined
OVERVIEW

Engineered Well Service International Inc. (EWS) (www.ewellservice.com) was founded in 2010. The Company provides oilfield services that include rehabilitation and maintenance of oil wells and rigs, waste minimization and clean up, and other ancillary oilfield services. EWS works with large oil companies such as Chevron USA, Shell Oil, others to maintain, clean, service and rehab their oil well equipment and operations.

The Company’s ability to service and rehabilitate oil rigs and all ancillary equipment puts EWS in the unique position to provide service when oil wells are both in and out of production. This flexibility allows EWS to adapt quickly to client demands that are often driven by volatile market conditions.

Need for Training

EWS is experiencing dramatic growth in California’s bourgeoning oil industry. In response to this growth, the Company is in the process of expanding its operations and capacities by adding employees and purchasing additional service rigs. Training is required across service lines to ensure a flexible workforce. In addition, new hire training will provide relatively unskilled workers from the Central Valley with the knowledge to perform newly assigned tasks with ideal efficiency.

The Company is also striving to improve employee proficiency in the use of various software applications currently being utilized both in the office and in the field. Training in this area will promote real-time data sharing and enhanced communication throughout the organization.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Under the Retrainee-Job Creation program, training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage.

In this proposal, EWS has committed to hiring a total of 15 new employees in the Rig Operator, Driver, Rig Assistant and General Laborer occupations (Job Number 3). The Company is expanding its business capacity through a significant investment of approximately $3.8 million in new equipment including a Vacuum Truck, Bobtail Pump Trucks, Drilling Rig and Hot Oil Trucks. The Company plans to form new service teams as these new pieces of equipment become operational. The proposed training will raise the skill level of newly hired untrained frontline workers, as well as equip incumbent workers with the tools to improve their overall productivity in the oilfield industry.

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

Training Plan

Business Skills: Training will be offered to Administration Staff and Supervisors/Managers. Training will focus on Total Account Development, a mixture of customer service, sales, product knowledge and effective communication. These topics will teach employees how to identify customer needs in ways that lead to increased customer satisfaction and new business opportunities for EWS. Project Management training will cover scheduling, materials purchasing and staging, site prep, safety and clean up. This training is designed to increase
efficiency and productivity by ensuring that all tools, materials, and equipment are on site in a timely fashion.

**Commercial Skills:** Training will be offered to Rig Operators, Drivers, Rig Assistants, General Laborers and Tier I & II Rescue Staff. Passport Training is a “boot camp” for entry into the industry. Training will cover rig types, blowout prevention, drilling fluids, pipe handling, casing and cementing, well logging, power systems, maintenance, and instrumentation.

To keep pace with demand, the Company will be deploying new equipment teams, and extensive training is required. In addition to Passport Training, workers will be trained in equipment set-up, calibration, shut down and maintenance to have four to five new service teams ready for the field.

EWS has identified a need to offer Tier I & II confined space rescue crews as a viable service line. These teams will pre-inspect client worksites, identify hazards, and develop a plan for confined space work. These teams will remain on standby to respond to any on-site confined space emergencies. The proposed training will equip these teams with the knowledge of safe planning and execution of confined space activities.

**Computer Skills:** This Training will be offered to all occupations. SAP systems training is designed to integrate all aspects of the business into one data sharing network that can manage financials, purchasing, inventory, scheduling, and production. The Bid2Win software package will support the areas of estimating and bidding, field tracking and analysis, equipment maintenance and repair, resource planning and dispatching. Geoforce software will allow the Company to locate and track its equipment with cloud-based global positioning technology. Microsoft Office Suite training will help improve communication and data sharing throughout the organization.

**Continuous Improvement:** This training will be offered to all occupations. Teambuilding exercises are designed to promote cooperation and establish that everyone in the organization is working towards a common goal. This training will teach workers how to lead, motivate, coach, and mentor members of a team. Lean training will help the Company maximize capacity, efficiency, and 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 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 primarily to Tier Rescue Staff and Supervisors.

2. **Hazardous Waste Operations and Emergency Response Standard (HAZWOPER):** This training is a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. Completion of the training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. This training will be provided to Rig Operators, Drivers, Tier Rescue Staff and Supervisors.
Productive Laboratory

The Panel recently adopted regulations to authorize reimbursement for training delivered in a Productive Laboratory (PL) setting. PL trainees may produce goods for profit as part of the training in the courses identified under the Curriculum. The instructor must be dedicated to training delivery during all hours of training.

EWS states that the unique hazards and machinery associated with working in oilfields require a certain level of instruction that is best taught on actual equipment and vehicles in a real-time environment. Therefore, the Company plans to provide PL in Commercial Skills training to its Rig Operators, Drivers and Rig Assistants. Training will take place at job sites in Inglewood, Bakersfield, Ventura, and McKittrick. PL training will help workers achieve the competencies necessary to perform their jobs safely, efficiently, and at a pace that is conducive to real-time conditions.

The proposed PL training in oilfield equipment operation and maintenance will include the use of Drill Rigs, Hot Oil Rigs, Vacuum/Guzzler Units and Hydroblasters. Training will be taught by subject matter experts with demonstrated knowledge and industry expertise.

Due to the high cost of equipment, training time and scheduling considerations, EWS requesting a trainer-to-trainee ratio of 1:3. Trainees will receive up to 18 hours of PL training.

High Unemployment Area Wage Modification

The 15 trainees in Job Number 2 work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company’s locations in Kern and Los Angeles counties (Bakersfield, McKittrick, Inglewood) 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. EWS is requesting a wage modification for the 15 trainees identified in Job Number 2 only to $12.00 per hour.

RECOMMENDATION

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 60

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Account Development
- Project Management

**COMMERCIAL SKILLS**
- Passport Training (oil well boot camp)
- Well Service/Rehabilitation
- Tank/Vessel Cleaning
- Tier I/Tier II Rescue
- Oilfield Equipment Operation and Maintenance
  - Drilling Rigs
  - Hot Oil Rigs
  - Vacuum/Guzzler Units
  - HydroBlasters

**COMPUTER SKILLS**
- SAP System Software
- Bid2Win
- Geoforce
- CAD System Technology
- Microsoft Office Suite

**CONTINUOUS IMPROVEMENT**
- Leadership/Teambuilding
- LEAN Processes

**HAZWOPER**
- Hazwoper/Hazardous Waste

**OSHA 10/30 (Certified OSHA Instructor)**
- OSHA 10 (Requires Completion of 10 Hours)
- OSHA 30 (Requires Completion of 30 Hours)
- Confined Space

**Productive Lab hours**
0 - 18

**PL - COMMERCIAL SKILLS** (Ratio 1:3)
- Oilfield Equipment Operation and Maintenance
  - Drilling Rigs
  - Hot Oil Rigs
  - Vacuum/Guzzler Units
  - HydroBlasters

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
Retrainee - Job Creation
Training Proposal for:
F. Lofrano & Son, Inc.

Small Business < $50,000
ET16-0162

Approval Date: August 31, 2015

ETP Regional Office: San Francisco Bay Area          Analyst: R. Jackson

**CONTRACTOR**

- Type of Industry: Services

  Priority Industry: ☐ Yes ☑ No

- Number of Full-Time Employees

  California: 74
  Worldwide: 74

  Number to be trained: 52

  Owner ☑ Yes ☐ No

- Out-of-State Competition: No OSC

- Special Employment Training (SET): ☑ Yes ☐ No

- High Unemployment Area (HUA): ☐ Yes ☑ No

- Turnover Rate: 12%

- Repeat Contractor: ☐ Yes ☑ No

**FUNDING**

- Requested Amount: $39,512

- In-Kind Contribution: $34,000
# TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
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<tr>
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<td>0 $902</td>
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</table>

- Reimbursement Rate: Job #’s 1 & 2: $22 SB Non-Priority
- County(ies): Marin, San Francisco
- Occupations to be Trained: Manager, Estimators, Technicians, Administrative Staff, Parts Staff
- Union Representation: Yes
- No
- Health Benefits: Job #1: $2.40 per hour  Job #2: $0.70 per hour

## SUBCONTRACTORS

- Development Services: Synergy Management Consultants LLC, Grass Valley, assisted with development for a flat fee of $2,375.
- Administrative Services: Synergy Management Consultants LLC will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: ICAR (Los Angeles), CCCOne (Tracy) and PRG Refinish Systems (San Francisco) will provide Commercial Skills.
OVERVIEW

Founded in 1974, F. Lofrano & Son, Inc. (Lofrano) (www.lofrano.com) (Lofrano) provides automotive repair services and sales of parts and accessories. The Company currently has three facilities in San Francisco and one in San Rafael.

Lofrano is expanding into an area of the automotive repair market which requires new equipment and certifications to service aluminum vehicles and trucks. The Company is gaining customers by developing relationships with Direct Repair Programs such as insurance providers E-Surance, Farmers, Nationwide and Allied. Both insurers and auto manufacturers require specific training certifications. ETP’s help will allow the Company to offer Technicians, (60% of the trainees) training that would otherwise not be feasible. New training certifications now require over 120 hours per technician, per year. This is due to industry shifts prompted by changes in manufacturing metals to meet fuel efficient standards set by the Department of Transportation National Highway Traffic and Safety Administration.

Upgrading worker skills will help Lofrano remain competitive and will increase the quality and safety of repairs. The Company has recently invested in new tools and equipment totaling over $50K to keep pace with rapid industry changes, but additional training, especially for recent Technician graduates is needed. New Technician graduates generally lack sufficient experience to work independently. The training planned addresses gaps in methods, strengthens tool use skills, and addresses an array of tasks to complete service jobs with a high level of precision.

The automotive collision repair industry has experienced changes to processes and materials as new vehicles must meet Corporate Average Fuel Economy (CAFE) standards. CAFE standards require a much higher level of fuel economy and vehicle weight is a significant factor. To meet these standards, manufacturers are reducing the weight of new vehicles by incorporating materials such as aluminum, ultra high strength steels, borons, and composites. These new materials and methods of vehicle construction require different methods of repair. Alternative fuel, hybrid technology and electric vehicles also require different repair methods. These changes create the need to re-tool and retrain employees to handle the repairs and to provide accurate estimates. Industry specific training such as Inter-Industry Conference on Auto Collision Repair (ICAR) and Automotive Service Excellence (ASE), are examples of training standard expectations set by insurance companies. Training in software systems and quality improvements are necessary at all locations to ensure consistency, timely reporting to insurance companies, and improve customer service.

Training Plan

Training will begin in August 2015 and will be provided by in-house trainers and vendors. Training will be provided in the following:

Business Skills  - Training will be provided to Administrative Staff, Estimator and Manager. This training is necessary for employees to understand the sales and claims processes and understand how their job function impacts the total customer experience.

Commercial Skills  - Training will be provided to Technicians, Estimators and Managers. Training will include maintenance-service, new vehicle technologies, aluminum, electric and hybrid repair, and extended ICAR credentials. Topics will also include certification for BMW, Toyota, Ford, Chrysler, GM, Nissan and other specific original equipment manufacturers. Sales Staff will need this training to understand the changes in the manufacturing process and be able to accurately estimate damage and create repair plans for the Technicians.
Computer Skills - All occupation will receive training relevant to their job functions. The training is necessary to accurately assess current conditions, set objectives, notice trends and communicate in a high-flow environment. The collision industry has seen changes in how insurers and other partners exchange data. The Direct Repair Programs requires trainees to be updated on new processes and procedures. Computer Skills will enable the Company to use IT systems to track costs; plan production and service flow while communicating with customers, potential customers and employees. Training will provide skills to reduce waste, and maximize efficiency and productivity.

Continuous Improvement - Training will be provided to all occupations to improve quality, cycle time, and cost efficiency by implementing Lean Production and Quality Control Process systems. These processes identify service, production and flow issues as well as their root causes. This training will provide solutions to improve quality, reduce waste and defects across all areas of the Company. Lofrano expects to increase efficiency by 15% with continuous improvement training.

Hazardous Materials – Training will be delivered to Technicians and will cover hazardous materials handling and disposal. Toxic debris, waste, and other contaminated materials are often processed during automotive repair work. Training will give trainees the skill sets needed to manage materials encountered during collision repair and clean-up.

Productive Laboratory

The Panel adopted regulations March 2011 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 and with no more than one trainee per instructor. The instructor must be dedicated to training delivery during all hours of training, and special attendance rosters will be used to assist in monitoring. A task competency list is on file and supports the request for Commercial and Computer Skills to be delivered via PL.

Lofrano estimates that 26 Technicians and Estimators will receive up to 18 hours of PL training. PL training for Technicians and Estimators the newly-hired will receive the most hours. PL training will utilize an experienced trainer to specify the scope of work, explain the process and needed equipment, verify that the trainee understands standards and specifications. The trainer will observe the employee perform the task, provide feedback, assist with re-work if necessary, and ensure that the task has been performed correctly to ensure that the employee understands the process and is proficient in the task.

The PL trainer-to-trainee ratio will not exceed 1:1 and will be capped at 18 hours per trainee.

Retrainee - Job Creation

In October 2015, Lofrano will open a fifth service location in San Francisco and needs to hire and train an estimated ten employees. The Company projects a sixth location to also open in the later part of 2016. Lofrano projects a 20% (2015-16) revenue growth from parts and automotive repair services. Lofrano is entering a niche market offering specialty repairs to service trucks and new aluminum vehicles. The changes in the recently increased business further influenced the decision to open a new shop in San Francisco and invest in new equipment, and acquire new employees.

Until the new facility is fully operational newly hired employees will be placed to work and trained at its headquarters location in San Francisco and recruitment is now underway. The
Company has verified that there is ample space in their existing garage to accommodate the new employees.

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

**RECOMMENDATION**

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours

8-60

Trainees may receive any of the following:

**BUSINESS SKILLS**
- Customer Care Skills
  - Customer Retention
  - Customer Engagement
  - Customer Relationship Building
- Advanced Sales & Marketing Skills
  - Prospecting & Closing
  - Sales Account Management
  - Advanced Closing Techniques
  - Sales Procedures & Strategies
- Negotiation Skills
- Conflict Resolution
- Communication Skills
- Presentation Skills
- Strategy Business acumen

**COMMERCIAL SKILLS**
- I-CAR Collision Repair Certification Skills
- Refinishing Skills
  - Trim & Hardware
  - Surface Preparation
  - Vehicle Priming/Sealing
  - Paint Spray Guns Maintenance & Set-Up
  - Corrosion Protection Process
  - Sand, Buff & Detail
  - Color Theory & Tints
  - Blending Techniques
  - New Technologies
- Structural Repair
  - Unibody Alignment
  - Three Dimensional Measuring
  - Repair & Replacement of Outer Body Panels
  - High Strength Steels
  - Aluminum Repair Processes
  - MIG Welding Skills
  - Straightening Structural Damage
  - Glass Replacement
  - Pillars, Rocker Panels, Rails, Front Structures & Floor Pan Replacement
  - Heating Cooling and AC Systems
  - Steering & Suspension Systems
  - Advanced Vehicle Systems
  - Composite Materials and Bonding Techniques
- Non-Structural Vehicle Repair Skills
  - Remove & Install Trim & Hardware
- Estimating Skills
  - Steering & Suspension System Damage Analysis
  - Damage on Non-Drivable Vehicles
  - Electrical/Mechanical Systems
  - Stationary Glass
  - Advanced Materials
  - Advanced Vehicle Systems
- Vehicle Operation, Maintenance & Troubleshooting
- Alternative Fuel & Hybrid Vehicle Repair Diagnostics
- Service Procedures & Scheduling
- Product Knowledge
- Original Equipment Manufacturer Knowledge/Skills
  - Ford, Chrysler, Nissan, Honda, BMW, Mercedes-Benz, Tesla

**COMPUTER SKILLS**
- CCCOne Software
  - Job Costing
  - Production Flow
  - Production Planning - ETA Times & Dates
  - Internal & External Customer Communication
- Mitchell & Mitchell Repair Center Software
- CCC Info Systems Software
- Alldata Software
- Microsoft Office Suite

**CONTINUOUS IMPROVEMENT**
- Leadership Skills
- Teambuilding
- Root Cause Analysis
- Kaizen Event Strategy & Implementation
- Lean Concepts
- Process/Quality Improvement
- Problem Solving/Decision Making Skills
- Inventory Control

**HAZARDOUS MATERIALS**
- Volatile Organic Compound Tracking
- Emergency Clean-Up
- Registration, Evaluation, Authorization & Restriction of Chemical Substances
Productive Lab

0-18

COMPUTER SKILLS (Ratio 1:1)
- Estimating Systems Software
  - Mitchell & Mitchell Repair Center Software
  - CCC Info Systems Software
  - Alldata Software

COMMERCIAL SKILLS (Ratio 1:1)
- Body Filler Methods
- Structural Resistance Spot Welding
- Mig Brazing
- Color Tinting
- Spraying/Blending
- Measuring Vehicle Structures
- Alignment Process For Unitized Vehicles
- Alignment Process For Full-Frame Vehicles
- Aluminum Repair
- Technical Estimating Skills
- Estimatics Direct Repair Program

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery. PL is capped at 18 hours per-trainee.
Training Proposal for:
Giroux Glass Inc.

Agreement Number: ET16-0190

Approval Date: September 11, 2015

ETP Regional Office: North Hollywood
Analyst: L. Vuong

PROJECT PROFILE

<table>
<thead>
<tr>
<th>Contract Attributes: Retraining Priority Rate</th>
<th>Industry Sector(s): Construction Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>County Served: Los Angeles, Fresno, San Bernardino</td>
<td></td>
</tr>
<tr>
<td>Repeat: Yes No</td>
<td>Priority Industry: Yes No</td>
</tr>
<tr>
<td>Union(s): Yes No</td>
<td>Glaziers Local Union 294 and Glassworkers Local Union 636</td>
</tr>
<tr>
<td>Turnover Rate: 10%</td>
<td></td>
</tr>
<tr>
<td>Managers/Supervisors (% of total trainees): 12%</td>
<td></td>
</tr>
</tbody>
</table>

FUNDING DETAIL

<table>
<thead>
<tr>
<th>Program Costs</th>
<th>(Substantial Contribution)</th>
<th>(High Earner Reduction)</th>
<th>Total ETP Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>$94,770</td>
<td>$0</td>
<td>$0</td>
<td>$94,770</td>
</tr>
</tbody>
</table>

In-Kind Contribution: 100% of Total ETP Funding Required $168,262
Minimum Wage by County: $15.07 per hour for Fresno and San Bernardino Counties; and $15.97 per hour for Los Angeles County.

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

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

Up to $3.47 per hour may be used to meet the Post-Retention Wage.

---

**Wage Range by Occupation**

<table>
<thead>
<tr>
<th>Occupation Titles</th>
<th>Wage Range</th>
<th>Estimated # of Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distribution Staff</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Sales Staff</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>Production/Glazier Staff</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Project Lead</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>Manager/Supervisor</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

Founded in 1946, Giroux Glass Inc. (GGI) ([www.GirouxGlass.com](http://www.GirouxGlass.com)) is an employee-owned company engaged in glass fabrication and installation for residential, commercial, private and public facilities. Major projects include the Cain Library at the California State University of Dominguez Hills, the Los Angeles Unified Central Learning Center, the Skywalk at the Grand Canyon, the City Center in Las Vegas, Getty Center in Los Angeles, Southwest Airlines at LAX airport, Bullard High School in Fresno, Kaiser in Chino Hills, Union Bank in Glendale and Tulare County Office in Visalia.

According to GGI, the Company is currently in a major growth mode in several areas: (1) The workforce has increased from 74 to 109 employees in California with the training support of the prior Agreement; (2) Conversion to a new and upgraded software Sage 300 system; and (3) Introduction of new products and services to the market such as electro chromic glass, translucent panels, intelligent skylights, building integrated photovoltaics, and AW-rated commercial micron-blended windows and doors.
This will be the second Agreement between ETP and GGI. Training under the prior ETP Agreement focused on standard worker job skills. Training under this contract will concentrate on advanced construction techniques, new building standards, Building Information Management (BIM) and Leadership in Energy and Environmental Design (LEED). BIM and LEED are technologies that designed to help build things faster and more efficiently. The Company also replaced its software to a more advanced design systems (Sage 300) to improve business functions and be proactive with technological advances to remain in business in California.

**Union Support**

ETP has received letters of support from Glaziers Local Union 294 and Glaziers, Architectural Metal & Glassworkers Local Union 636 for Production/Glazier Staff.

**PROJECT DETAILS**

GGI is in the process of developing a training program to improve business functions and to support the Company as it continues to grow. The Company also faces challenges related to technology advances and increases in customer demand. ETP funds will allow its workforce to develop the skills necessary to address these challenges and remain competitive.

**Training Plan**

GGI had tremendous success with the assistance and support provided by the first ETP Agreement. Therefore, the Company wishes to continue training its workforce to support its objectives and further strengthen the business.

In this proposal, workers will receive in-depth training in all aspects of the business including internal systems, company products and services, sales and marketing, new product knowledge, customer specifications, process improvements and new technological advances. ETP funding will assist GGI to successfully upgrade worker skills, increase production efficiencies, and manage overall business growth. In-house subject matter experts will deliver training. Outside vendors may be identified during the term of the proposed Agreement. Training will take place at its three facilities: Los Angeles, Fresno and San Bernardino and local worksites.

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

**Business Skills** (40%) – Training will be offered to all occupations in communications, sales & marketing and presentation skills. Training will provide workers the necessary skills to increase knowledge and perform their jobs more effectively.

**Commercial Skills** (15%) – Training will be offered to Project Leads, Distribution, Sales, and Production/Glazier Staff. Green Building and energy efficiency training will be provided due to the demand for energy efficient construction methods and technologies.

**Computer Skills** (20%) – Training will be offered to all occupations. Training will assist workers develop proper tools to estimate expenses, identify costs and work orders, generate reports and access and utilize calls to provide technical support.

**Continuous Improvement** (20%) – Training will be offered to all occupations to promote and improve workflow, enhance delivery processes and better serve customers.
OSHA 10/30 (5%) – OSHA 10 training will be provided to Production/Glazier Staff and Project Leads. OSHA 30 training will be provided to Manager and Supervisor to ensure a safe work environment.

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.

Commitment to Training

GGI reports that it does not have a formal training budget. The Company provides training in informal on-the-job training, new hire orientation, sexual harassment prevention and OSHA-mandated safety training. Most training is delivered via class/lab, on-the-job and computer-based.

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

Training Infrastructure

The Company has hired Training Funding Source to aide in the administration of the ETP program. GGI’s Director of Legal and Human Resources has been assigned as the main point of contact.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0143</td>
<td>Los Angeles, Fresno, San Bernardino</td>
<td>08/26/13 – 08/25/15</td>
<td>$49,140</td>
<td>$49,140</td>
<td>(100%)</td>
</tr>
</tbody>
</table>

DEVELOPMENT SERVICES

Training Funding Source (TFS) in Seal Beach assisted with development of this proposal for a flat fee of $4,900.
ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined
Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Finance
- Coaching
- Communication
- Contract Administration
- Customer Relations
- Goal Setting
- Leadership
- Negotiating
- New Product Knowledge
- Bidding Techniques
- Marketing/Sales
- Project Management
- Public/Private Partnership Bidding
- Business Standards and Practices

**COMMERCIAL SKILLS**
- Energy Efficiency – New Products
- Glass & Metal Fabrication and Installation
- Green Building Techniques
- Job Site Procedures
- Leadership Energy Environmental Design

**COMPUTER SKILLS**
- Building Industry Modeling
- Electronic Document Management system
- Microsoft Office
  - Intermediate and Advanced
  - Server 2012
  - Window 10)
- Microsoft Project Scheduling
- Sage 300
- Social Media

**CONTINUOUS IMPROVEMENT**
- Change Management
- International Standards Organization
- Workflow Improvement
- Process/Quality Improvement
- Presentation Skills
**OSHA 10/30** (Certified OSHA Instructor)
- OSHA 10 (requires completion of 10 hours)
- OSHA 30 (requires completion of 30 hours)

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

Note: Reimbursement for retraining is capped at 200 total training hours per trainee, regardless of the method of delivery.
June 29, 2015

Ms. Jill McAlloon
Acting Executive Director
The Employment Training Panel
1100 J Street
Fourth Floor
Sacramento, CA 95814

Union Support for ETP Funding

Ms. Jill McAlloon:

This letter is to confirm support by Glaziers Local Union 294 for Giroux Glass proposed training to be submitted to Employment Training Panel.

Sincerely,

Jeffery B Roberts
Business Representative
District Council 16
Glaziers, Architectural Metal and Glass Workers
Local Union 294
June 29, 2015

Ms. Jill McAlloon
Acting Executive Director
The Employment Training Panel
1100 J Street
Fourth Floor
Sacramento, CA 95814

Re: Union Support for ETP Funding

Ms. Jill McAlloon,

This letter is to confirm support by Glaziers Local Union 636 for Giroux Glass proposed training to be submitted to Employment Training Panel.

Sincerely,

Mark Bartlett,
Business Representative District Council 36
Glaziers, Architectural Metal and Glass Workers-
Local Union 636
DELEGATION ORDER

Training Proposal for:
International Technologies & Systems
Corporation dba ITSCO

Small Business ≤ $50,000
ET16-0170

Approval Date: August 28, 2015

ETP Regional Office: North Hollywood  Analyst: M. Reeves

CONTRACTOR

- Type of Industry: Wholesale Trade
  Manufacturing
  Priority Industry: ☒ Yes ☐ No
- Number of Full-Time Employees
  California: 81
  Worldwide: 100
  Number to be trained: 81
  Owner ☐ Yes ☒ No
- Out-of-State Competition: Customers Outside CA
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 3%
- Repeat Contractor: ☐ Yes ☒ No

FUNDING

- Requested Amount: $48,438
- In-Kind Contribution: $49,000
TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100 Priority Rate</td>
<td>Advanced Tech, Business Skills, Computer Skills, Cont. Imp., Mgmt. Skills, Mfg. Skills, OSHA 10</td>
<td>81</td>
<td>8-60</td>
<td>0</td>
<td>$598</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): Alameda, Orange
- Occupations to be Trained: Administrative Staff, Information Technology Staff, Marketing/Product Management Staff, Engineering Staff, Sales Staff, Operations Staff, Quality Assurance Staff, Service Center Staff, Technical Support Staff, Manager
- Union Representation: ☐ Yes
- ☑ No
- Health Benefits: Job #1: $2.63 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

International Technologies & Systems Corporation dba ITSCO (ITSCO) is a wholesaler and distributor of bar code software, printers and scanners, as well as magnetic stripe readers, decoders and terminals. ITSCO also designs and manufactures automatic identification products and components such as magnetic stripe readers, smart and contactless card readers/writers, bar code readers, document scanners, point of sale keyboards, and Secure PIN Entry products. Founded in 1985, the Company is headquartered in Cypress, and also has a R&D facility in Fremont. The Company’s primary manufacturing facilities are located in Asia; however, some light manufacturing functions do take place at the Fremont facility. The proposed training will take place at both California locations.

ITSCO operates in an industry that is rapidly changing from magnetic stripe payment technology to chip-based EMV (Europay, MasterCard, and Visa) technology. This shift in automatic identification technology and equipment requires ITSCO to thoroughly upgrade the knowledge
and skills of its workforce. In addition, the Company has identified a need to improve the level of communication and coordination between its two California facilities.

Training Plan

Business Skills – Training will be offered to all occupations. Training will focus on product knowledge, sales, inventory control, contract administration and managing priorities. This training will help workers improve customer relations and project management skills, as well as equip them with better planning and communication skills to solve problems more effectively.

Computer Skills – Training will be offered to all occupations. This training will help staff to become more proficient in the use of business software solutions in the areas of resource planning, inventory control, sales forecasting, order tracking and document control.

Continuous Improvement – Training will be offered to all occupations. Training emphasis will be in process improvement, quality management and control, problem solving, and workplace organization principles. Training is designed to streamline and standardize processes, reduce cycle time, and maximize worker efficiency.

Management Skills – Training will provide Managers with the leadership, project management, planning, and communication skills needed to become more effective leaders in a high-performance workplace.

Manufacturing Skills – Training will be offered to Engineers and Service Center Staff. ITSCO performs light manufacturing at its Fremont facility. Training will focus on machine operation (Lathes, Milling and Drilling), CNC Machining, and use of Rapid Prototype machines. Training is designed to improve productivity and product quality, as well as enhance workers’ overall knowledge of manufacturing processes.

Advanced Technology (AT) – Training will be provided to Information Technology Staff and Engineers who are responsible for complex programming, engineering and design. Training will include software/firmware programming, 3D design, and secure coding.

The AT courses outlined in the Curriculum require specialized training on complex network equipment and sophisticated software. Therefore, these courses will be delivered with a trainer-to-trainee ratio not exceeding 1:10, thus allowing for in-depth coverage and personal attention from highly skilled subject matter experts.

Certified Safety Training

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

RECOMMENDATION

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 60

Trainees may receive any of the following:

ADVANCED TECHNOLOGY

- CAD
  - Solid Works 3D – Dassault Systems
  - OrCAD Schematic Capture – Cadence Design Systems
  - PADS Power PCB – Mentor Graphics
- Software/Firmware Programming
  - C/C++
  - Java
  - Web Services
  - Software Revision/Release Control
  - Secure Code Techniques
- Graphic Design
- Intermediate/Advanced Proficiency in HTML
- Hardware Design for Non-Engineers
- Software Design for Non-Engineers

BUSINESS SKILLS

- Inventory Control Principles
- Product Build Structure
- Product Training
  - Introduction to Products
  - Model Designation
- Effective Sales Negotiation
- Conflict Resolution Skills
- Sales Forecasting Methods
- Relationship Building and Networking
- Sales Presentations that Win
- Effective Presentation
- Creating and Selling a Business Plan
- Contracts Administration
- Mastering Sales Opportunity
- Sales Prospecting & Appointment Setting
- Handling Sales Objections
- Managing Your Sales Pipeline
- Managing Priorities
- Professional Development
  - Accountability
  - Emotional Intelligence
  - Influencing
  - Managing Cultural Differences
  - Managing Difficult Conversations
- Improving Team Effectiveness
- Business Writing
- Consultative Approaches
- Principles of Accounts Payable & Collections
- Cost Accounting
- Operational Forecasting
Material Resource Planning
Procurement & Sourcing Management
Organizational and Planning Skills
Europay, MasterCard, Visa Training (Industry-Specific)

COMPUTER SKILLS
Computerized Sales Forecasting
ADP WorkForce Now (HRIS/Payroll System)
Inventory Control Systems
Purchase Order Tracking
Revision and Document Control Management
Sales Force Customer Relationship Management Application
Confluence – Atlassian (Collaboration Application)
Agile – Atlassian (Issue Tracking Application)
JIRA – Atlassian (Project Management Application)
Expandable/TipTop Applications
HTML Basics
Arena
Excel

CONTINUOUS IMPROVEMENT
Project Management
Problem Solving
Process Improvement
Total Quality Management
ISO 9001 Systems
Cycle-Time Reduction Techniques
Cycle-Time Management Techniques
IPC 610 Training for Inspectors & Assemblers
Methods of Continuous Process Improvement
Effective Root Cause Analysis
Internal Auditing
Documenting Processes
5S Principles
Kaizen Principles
Key Process Indicators
Variation/Process Control
Quality Concepts
Design for Manufacturing Acceptability
Production Scheduling & Control Strategies
Developing Statistical Process Control
Warehouse & Inventory Management
Transportation/Freight Management & International Logistics
Train-the-Trainer

MANAGEMENT SKILLS (Managers/Supervisors Only)
Effective Leadership & Communication
Team-Building
Effectively Communicate Goals and Expectations
Motivation
Behavior Style Strategies (Managing Personalities)
Effective Delegation Skills/Techniques
Performance Management
Coaching and Mentoring
Strategic Planning, Monitoring, Evaluations
Managing Across Global Locations & Culture
New Supervisor Training (hands on, inflows, time studies, etc.)
Building Employee Engagement
Lean Six Sigma
Keeping Talent
Senior Management Program
  o Accountability
  o Change Management
  o Decision Making
  o Delegation
  o Giving Feedback
  o Influencing
  o Managing Conflict

MANUFACTURING SKILLS
Machining Training (Lathes, Milling, Drilling)
CNC Machining/Programming
Rapid Prototype Machines (FDM, SLC, etc.)
Certified Forklift Training
OSHA 10-Hour Outreach Training
Powered Industrial Truck Operator Training
TR39 Pin Security & Key Management Training

OSHA 10 (OSHA Certified Instructor)
  OSHA 10 (requires completion of 10 hours)

Note: Reimbursement for retraining is capped at 60 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
Penguin Computing, Inc.

Small Business < $50,000
ET16-0168

Approval Date: August 31, 2015
ETP Regional Office: San Francisco Bay Area  Analyst: R. Jackson

CONTRACTOR

- Type of Industry: Manufacturing
  Technology/IT
  Priority Industry: ☒ Yes ☐ No

- Number of Full-Time Employees
  California: 84
  Worldwide: 106
  Number to be trained: 84
  Owner ☐ Yes ☒ No

- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☒ No
- High Unemployment Area (HUA): ☐ Yes ☒ No
- Turnover Rate: 12%
- Repeat Contractor: ☒ Yes ☐ No

FUNDING

- Requested Amount: $34,944
- In-Kind Contribution: $39,340
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate SB &lt;100</td>
<td>Business Skills, Computer Skills, Continuous Improvement, Manufacturing Skills</td>
<td>84</td>
<td>8-60</td>
<td>$416</td>
<td>$16.44</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): Alameda, San Francisco
- Occupations to be Trained: Administrative Staff, Finance Staff, CEO, CFO, CTO, Director, Engineers, Production Staff, Technical Staff, Managers, Supervisor, Product Engineer, Product Managers, Project Program Managers, Leads, Sales/Marketing Staff, Technical Support Staff, VP, IT
- Union Representation: No
- Health Benefits: Job #1: $2.33 per hour

**SUBCONTRACTORS**

- Development Services: CTA in San Jose assisted with application development for a flat fee of $2,500.
- Administrative Services: CTA will also perform administrative services in connection with this proposal for a fee not to exceed 13% of amount earned.
- Training Vendors: To Be Determined

**OVERVIEW**

Penguin Computing, Inc. (Penguin), founded in 1998 in San Francisco, provides customized High Performance Linux-based Computing (HPC) solutions. Penguin’s products range from Linux servers and workstations, integrated turn-key HPC clusters, and cluster management software. A cluster is a group of machines interconnected in a way to work together as a single system resulting in faster computational strength. Penguin also customizes build-to-order server solutions. Penguin recently became an Original Equipment Manufacturer. This means that in addition to the assembly work traditionally performed at Penguin, the Company is now designing and manufacturing products in-house. San Francisco and Fremont staff will participate in training.
Penguin has installed over 18,000 systems within the academic, government, life sciences, manufacturing, financial services, and web hosting industries, in over 40 countries. Some of its customers include AOL, NASA, Caterpillar, Lockheed Martin, Boeing, Life Technologies and the US Navy.

Penguins’ prior training project trained 42 employees and was completed in June 2015. The prior training project was primarily a skill enhancement program designed to keep the Company competitive in California with highly skilled technical employees. This new training proposal further supports needed training related to the recent expansion of the Company, making it an Original Equipment Manufacturer. Also, many technological upgrades and new employees prompt additional training needs as new products are being designed and delivered.

Penguin is eligible for ETP funding as a qualified priority industry.

**Training Plan**

The goal of the training project is to improve employee skills, increase productivity, enhance efficiency, provide skills related to new fabrication tasks, implement stronger quality controls, and boost sales. Penguin reports a near 30% growth in its employee base in the last two years. Although eligible, the Company chose not to include Job Creation elements in the prior Agreement or current proposal. The decision to not request a Job Creation Job Number was based on the perceived administrative ease to keep the population in one Job number and a lack of any need for a lower wage which is typically allowed for Job Creation populations. Penguin is currently in a strong investment mode to meet the rollout of new products scheduled to hit markets in 2016. Thus, Penguin’s emphasis on upgrading skills to keep pace with rapid technological changes and new developments driven by consumer demands is reflected in the proposed curriculum.

This will be Penguin’s second ETP Agreement. Of the 84 trainees, 42 are receiving training for the first time. The remaining repeat trainee population will be receiving training in topics they have not previously been trained on under the prior ETP agreement. Topics repeated from the prior agreement will only be attended by new employees or employees that have not attended before. Training is set to begin upon Panel approval.

Class Lab training will be delivered by subject matter experts in-house. E-learning will be provided by vendors based in CA, or otherwise approved in advance as required by ETP. Vendors are still to be determined.

**Business Skills:** Training will be offered to all trainees to increase familiarity with company products, improve customer service and manage projects more efficiently. Additionally, skills to coach others, deliver professional presentations, and manage projects within their work areas have been deemed necessary by Penguin.

**Computer Skills:** Training will be offered to Engineers, Leads, Managers, Supervisors, IT Staff, Sales/Marketing and Support Staff. A new ERP system (NetSuits) and a new finance system (Adaptive Insights) was recently installed. The ERP system will help track production schedules and improve delivery times. The new finance system will help the Company better respond to Auditing requirements related to government contracting and other customer demands for improved quality. Any of the repeated topics listed in this project remain in the curriculum as result of updates made to software which required further training. The more sophisticated topics listed in the curriculum will be delivered to Engineers and are related to building skills to enable the engineers to support software applications and related updates.
Manufacturing Skills: Training will be offered to Production Staff, Technicians, Engineers, Leads, Supervisors and Managers. New manufacturing and fabrication procedures for new products such as Relion Servers, Linus Workstations and Artica network switches require technical skill upgrades to reduce production costs. Production workers will be cross trained to manage multiple manufacturing (assembly and fabrication) functions. Technicians will be trained to install and maintain Scyld products at the customer’s site. The training is new to these employees and will include; concepts and functionality of Scyld ClusterWare software, essential configuration and administration of the Scyld environment, fundamentals of creating and executing cluster-aware software applications, how to use Scyld-specific commands and system monitoring applications and customization and control of the Scyld environment using Scyld utilities and environment variables. Supervisors and Managers who work on the manufacturing floor also need to know all new product and processes in order to help train less experienced employees in all aspects of installation, maintenance and product updates. Lastly, materials management (shipping/receiving) and forklift training will be provided to production staff.

Continuous Improvement: Training will be offered to all employees. Lean Manufacturing skills and its related components (Six Sigma) will lead to reduced costs, improved efficiency, and increased productivity. Leadership and coaching skills will help Leads and Managers attain strategic goals. Transitioning to an Original Equipment Manufacturer requires adding quality metrics to satisfy customers. As a result of rapid product expansions Penguin hired a Quality Engineer and created a number of new quality control processes. Consequently, the majority of the production related classifications must now undergo training to implement the new processes as a part of Penguins continuous improvement strategy.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET13-0385</td>
<td>Fremont</td>
<td>06/03/13 – 06/02/15</td>
<td>$44,200</td>
<td>$35,719 (81%)</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab e-Learning Hours

Trainees will receive any of the following:

**BUSINESS SKILLS**
- Global Marketing & Communications
- New Product Knowledge and updates
- OCP – Open Compute Project product training
- RAID – Redundant Array of Independent Disks technology training
- Sales Order Process
- High Speed Networks
- Penguin Server Pre-Sales
- Presentation & Writing Skills (Technical/Non-Technical)
- Product Management Process
- Sales & Negotiating
- Software-Defined Networking Pre-Sales New product
- Storage Architecture Pre-sales
- Vendor Product Updates

**COMPUTER SKILLS**
- Order Management Systems
- Ceph Product updates
- Cluster Technology
- Cisco Certified Networking CCNA
- CompA+ Hardware training
- Embedded Firmware Updates
- ERP (Electronic Resource Planning System)
- Financial Planning / Forecasting tools (Adaptive Insights)
- Hardware Troubleshooting / Hardware Modeling
- Linux System & Tools
- Lustre Software
- Microsoft Tools (Intermediate / Advanced only)
- NetSuite
- Network+ - networks training
- New Product Design / Development
- Nvidia Graphics Card
- Penguin Products and New Updates
- Programming Languages / Software Tools
- Project Management Software Tools
- RedHat Tools / RedHat Certification
- SalesForce
- Vendor Software Updates

**CONTINUOUS IMPROVEMENT**
- Customer Service Techniques
- Effective Meetings
• Graphics Processing Unit (GPU)
• High Performance Work Teams
• Manufacturing Quality Practices
• OEM Manufacturing Techniques
• Organizing & Prioritizing
• Productivity Improvement
• Quality / Process Improvement & Audit
• SPC / Lean / Process Improvements
• Leadership Skills
• Coaching Skills
• Working Smarter / Workflow
• Workplace Communications

MANUFACTURING SKILLS
• Assembly – Servers, Racks,
• Cross Training
• Design (Server, Networking, Storage products)
• Document Control System
• Fabrication Techniques
• GPU (graphics processing unit)
• Hardware Training (CPU, Memory, Power Supply, Motherboard)
• Installing / Servicing Equipment
• Machinery Certification
• Maintenance of Equipment
• Manufacturing Computer System
• Material Handling / Storage
• New Build Instructions / Process Changes
• New Equipment Knowledge / Certification
• OEM Manufacturing techniques
• Onsite Troubleshooting / Reliability / Inspection
• Operating Production Equipment
• Power Vehicle Training (forklift)
• Prototyping
• Repair / Refurbishing / Testing of Electronic Assemblies
• Shipping / Receiving Processes
• Warehouse / Material Mgt.

Note: Reimbursement for retraining is capped at 60 total hours per-trainee, regardless of method of delivery.
Training Proposal for:
Torosian & Walter, LLP

Small Business ≤ $50,000

ET16-0158

Approval Date: August 28, 2015
ETP Regional Office: Sacramento
Analyst: K. Smiley

CONTRACTOR

- Type of Industry: Financial Services
  Priority Industry: ☐ Yes ☑ No

- Number of Full-Time Employees
  California: 32
  Worldwide: 32
  Number to be trained: 31
  Owner: ☑ Yes ☐ No

- 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

FUNDING

- Requested Amount: $27,280
- In-Kind Contribution: $35,000
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraine SB &lt;100 SET</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement</td>
<td>25</td>
<td>8-60</td>
<td>0</td>
<td>$880</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Retraine SB &lt;100 SET HUA</td>
<td>Business Skills, Commercial Skills, Computer Skills, Continuous Improvement</td>
<td>6</td>
<td>8-60</td>
<td>0</td>
<td>$880</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Weighted Avg: 40</td>
<td></td>
</tr>
</tbody>
</table>

*It will be made a condition of contract that the trainees in Job Number 2 will never be paid less than the statewide minimum wage rate as in effect at the end of retention (Final Payment) regardless of the wage expressed in this table.*

- **Reimbursement Rate:** Job #’s 1 & 2: $22 SB Non-Priority
- **County(ies):** Fresno
- **Occupations to be Trained:** Administrative Staff, Front Line Managers, IT Staff, Project Managers, Staff Accountants, Partner Accountants, Owners, Accounting Support Staff
- **Union Representation:** □ Yes  ☒ No
- **Health Benefits:** Job #’s 1 & 2: $2.00 per hour

**SUBCONTRACTORS**

- **Development Services:** Strategic Business Solutions, LLC of Visalia assisted with development of this proposal for a flat fee of $1,909.
- **Administrative Services:** Strategic Business Solutions, LLC will also assist with administrative services for a fee not to exceed 13% of earned funds.
- **Training Vendors:** To Be Determined

**OVERVIEW**

Founded in 1990 and located in Fresno, Torosian & Walter, LLP (Torosian) (www.twcpa.com), provides accounting, tax and business consulting to various industries. The Company specializes in tax planning and preparation; financial statement preparation; estate planning; and business and computer consulting.
Need For Training

This is Torosian’s third ETP Agreement, the second within the last five years. Torosian’s first Agreement provided training in Business Writing, Business Communication and Internal Software Programs. This allowed the Company to implement internal software specifically designed for their customers and financial services provided. The previous ETP Agreement focused on increasing customer satisfaction and professionalism. This allowed Torosian to compete with larger businesses and improve their customer’s experience.

For this Agreement, Torosian is upgrading several software packages. These software upgrades will include Practice CS and UltraTax. Practice CS is accounting management software used to track client, staffing and billing information. UltraTax is tax preparation software that allows incumbent workers to more efficiently and accurately prepare tax documentation for clients. These two software programs are an intricate part of the services that Torosian provides.

In 2015, Torosian expanded services to include business consulting and management services. Torosian found that by expanding into these areas the Company could expand its customer base. However, staff require training to become subject matter experts. Workers will receive training in strategic planning to implement a successful business plan for clients.

Training Plan

Business Skills: Training will be provided to all occupation to improve customer satisfaction, effective communication and successful strategic planning. Courses will include Account Development, Effective Communication and Strategic planning.

Commercial Skills: Training will be provided to all occupations to increase accuracy, client relationships and knowledge of new tax law. Courses will include Tax Planning and Preparation, Financial Statement Preparation and Generation.

Computer Skills: Training will be provided to all occupations to effectively utilize financial and tax preparation software. Courses will include Practice CS Training, Bill.com Training, Yardi Software Training and QuickBooks Account Training.

Continuous Improvement: Training will be offered to all occupations to encourage teamwork, and standardize processes and productivity throughout the organization. Courses will include Team Building and Leadership Skills.

SET/HUA

Under Special Employment Training (SET) companies are not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.

For trainees located in a High Unemployment Area (HUA), the Panel may reduce the minimum wage requirements for trainees by up to 25% below the ETP minimum wage requirements. However, the trainee’s post retention must be higher than the wage at the start-of-training.

The Company’s location in Fresno County qualifies for HUA status. Torosian is requesting a wage modification for six trainees (Job Number 2) to $11.50 per hour.
RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned $</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET11-0314</td>
<td>Fresno</td>
<td>06/30/11-06/29/12</td>
<td>$47,520</td>
<td>$31,900</td>
<td>(67%)</td>
</tr>
</tbody>
</table>

During the ET11-0314 Agreement discussion arose between ETP and Torosian around the delivery method of training. Torosian delivered some training that may have been misconstrued as Productive Lab by ETP. Instead of filing an appeal, Torosian chose to adhere to ETP’s request to delete the uploaded hours. If the hours were not deleted by Torosian, the earned amount would have been over 70%. Under this proposal all training will be documented as and delivered in a Class/Lab setting. This proposal has been right-sized as Torosian is requesting funding less than the earned amount in the ET11-0314 Agreement.
Exhibit B: Menu Curriculum

**Class/Lab Hours**

8-60 Trainees may receive any of the following:

**BUSINESS SKILLS**
- Account Development
- Effective Communication
- Social and Media Marketing
- Recruiting/Interviewing Skills
- Strategic Planning

**COMPUTER SKILLS**
- Website Development
- Advanced Computer Networking
- QuickBooks Accounting
- Practice CS
- File Cabinet CS
- Fixed Assets CS
- Bill.Com Training
- Yardi Software
- UltraTax Software

**CONTINUOUS IMPROVEMENT**
- Team Building
- Leadership Skills

**COMMERCIAL SKILLS**
- Financial Statement Preparation/Generation
- Tax Planning and Preparation
- Gift and Estate Planning
- Tax Authority Audit Training
- Affordable Care Act Training
- Business Practice Management/Consulting

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

Small Business ≤ $50,000
ET16-0172

Approval Date: August 31, 2015
ETP Regional Office: North Hollywood
Analyst: M. Reeves

CONTRACTOR

- Type of Industry: Services
  Technology/IT
  Priority Industry: ☐ Yes ☐ No
- Number of Full-Time Employees
  California: 22
  Worldwide: 22
  Number to be trained: 22
  Owner ☐ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☐ No
- High Unemployment Area (HUA): ☐ Yes ☐ No
- Turnover Rate: 20%
- Repeat Contractor: ☐ Yes ☐ No

FUNDING

- Requested Amount: $49,764
- In-Kind Contribution: $100,890
**TRAINING PLAN TABLE**

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retraineer SB &lt;100</td>
<td>Business Skills, Computer Skills, Continuous Improvement</td>
<td>22</td>
<td>8-100 0</td>
<td>$2,262</td>
<td>$33.65</td>
</tr>
</tbody>
</table>

- Reimbursement Rate: Job #1: $26 SB Priority
- County(ies): Los Angeles
- Occupations to be Trained: Software Engineer, Sales Executive, Vice President, Director, Manager
- Union Representation: Yes
- Health Benefits: N/A

**SUBCONTRACTORS**

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

**OVERVIEW**

Trinus Corporation (Trinus) is a professional services IT firm. Since 1995, Trinus has delivered experience, knowledge, and best practices in Data Management, Business Intelligence, Financial Performance Management, and Enterprise Applications designed to help clients solve their business challenges. The Company’s focus is to help its clients get actionable insights from their data and enable them to unleash the power of information in their businesses. Whether it is defining a business intelligence strategy, executing a data management program, or delivering a performance management solution, or high performance analytics, Trinus helps its clients achieve their goals through business-aligned solutions. The Company provides business solution strategies to clients from an array of industries including Federal/State/Local Government, Asset Backed Lending, Consumer Products, Direct Marketing, Financial Services, Healthcare, Life Sciences, and Retail.

**Need for Training**

With the ever-evolving nature of technology, Trinus is in the process of expanding its services to offer newer technologies to its clients. To facilitate the implementation of new technology and services, the Company plans to provide its software engineering team with comprehensive training in various software applications (Tableau, Cloudera Hadoop, Big Data, Visualization for Business Intelligence, MicroStrategy, Cognos, and Oracle), applications critical to the success
of client projects. In addition, the Company has identified a vital need to build and train its sales and leadership team to be more effective in the highly competitive environment of professional IT services.

The proposed training plan is designed to help the Company achieve its business objectives by improving client relations, maximizing productivity, and increasing operational efficiency.

Training Plan

**Business Skills** – Training will be offered to all occupations. Training will focus on impactful communication, presentation skills, and effective sales techniques. This training will help workers enhance their sales presentation, improve client rapport, and expand their service skills.

**Computer Skills** – Training will be offered to all occupations. This training will help staff to become more proficient in the use of business software solutions in the key business areas of data management, business analytics, financial performance, and custom applications development.

**Continuous Improvement** – Training will be offered to all occupations. Training will provide those individuals responsible for coaching and mentoring co-workers and/or managing projects with the tools to solve problems, promote teamwork, make informed decisions, and provide innovative solutions to customer-related issues.

Modification to Small Business Cap on Training Hours

Trinus representatives report that a lengthier training program is required because, as a small business, most employees have shared responsibilities across multiple disciplines throughout the Company. These cross-functional responsibilities reduce staffing costs and create efficiencies that support competitiveness. The proposed Curriculum is designed to equip all trainees with the requisite level of knowledge and skills to help clients realize their complex business goals. All trainees will receive extensive training in the three key components of the Curriculum: Business Skills, Computer Skills, and Continuous Improvement. The weighted average of 87 hours of training per trainee is directly related to the amount of instruction necessary for trainees to achieve the highest level of technical expertise. All of the proposed training is geared towards employees in high-wage, high-skilled jobs, which is consistent with Panel priorities. Therefore, Trinus is requesting a modification to the 60-hour cap.

RECOMMENDATION

Staff recommends approval of this proposal.
Exhibit B: Menu Curriculum

Class/Lab Hours
8 - 100

Trainees may receive any of the following:

BUSINESS SKILLS
- Communicating with Impact
- Presentation Skills
- Presentation Design
- Public Speaking
- Sales Training

COMPUTER SKILLS
- MS Word
- MS Excel
- PowerPoint
- Outlook
- QlikView
- Informatica Products and Applications
- Tableau
- Cloudera Hadoop
- Big Data
- Master Data Management/Data Governance
- Visualization for BI
- MicroStrategy
- Cognos
- Oracle Products and Applications

CONTINUOUS IMPROVEMENT
- Leadership Essentials
- Dealing with Conflict
- Coaching for Peak Performance
- Performance Improvement
- Accountability
- Strategies to Build Teamwork

Note: Reimbursement for retraining is capped at 100 total training hours per trainee, regardless of the method of delivery.
Training Proposal for:
Zobrist Consulting Group, Inc.

Small Business ≤ $50,000

ET16-0191

Approval Date: September 11, 2015
ETP Regional Office: North Hollywood    Analyst: L. Vuong

CONTRACTOR

- Type of Industry: Technology/IT Services
  Priority Industry: ☑ Yes ☐ No
- Number of Full-Time Employees
  California: 30
  Worldwide: 30
  Number to be trained: 30
  Owner ☑ Yes ☐ No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): ☐ Yes ☑ No
- High Unemployment Area (HUA): ☐ Yes ☑ No
- Turnover Rate: 6%
- Repeat Contractor: ☑ Yes ☐ No

FUNDING

- Requested Amount: $46,800
- In-Kind Contribution: $102,300
## TRAINING PLAN TABLE

<table>
<thead>
<tr>
<th>Job No.</th>
<th>Job Description</th>
<th>Type of Training</th>
<th>Estimated No. of Trainees</th>
<th>Range of Hours</th>
<th>Average Cost per Trainee</th>
<th>Post-Retention Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Retrainee Priority Rate SB &lt;100</td>
<td>Business Skills, Computer Skills, Cont. Imp.</td>
<td>30</td>
<td>8-80</td>
<td>0</td>
<td>$1,560</td>
</tr>
</tbody>
</table>

- **Reimbursement Rate:** $26 SB Priority
- **County(ies):** Los Angeles, Orange
- **Occupations to be Trained:** Developer, Project Leader, Sales Staff, Administrative Staff, Owner
- **Union Representation:** □ Yes  ☒ No
- **Health Benefits:** N/A

### SUBCONTRACTORS

- **Development Services:** Training Funding Source (TFS) in Seal Beach, assisted with development for a flat fee of $2,900.
- **Administrative Services:** TFS will also provide administrative services for an amount not to exceed 13% of payment earned.
- **Training Vendors:** To Be Determined

### OVERVIEW


Zobrist must keep up with technology and customer demand in a constantly changing environment to remain competitive. Technology is advancing at a rapid pace and new systems are constantly being introduced into the marketplace. In addition, customers are continually expecting better and faster services and products at a lower cost.

Zobrist is currently transitioning to Cloud and Bluemix technologies, Adobe Experience Manager and Internet of Things applications. These improvements will assist in meeting Zobrist’s current market needs and customer demand. Going forward, the Company will focus on redesigning, updating, developing, and creating high technology products and services. Improved technology systems and highly trained staff will drive Zobrist to meet these demands. With these new technologies, Zobrist anticipates an increase of 15% in business and revenue; and the Company plans to hire at least four new employees within the next six months. In this proposal, Zobrist is requesting ETP funding to train 30 employees at its two facilities: Woodland Hills and Irvine.
Training Hours Limitation

Zobrist requests a waiver to exceed the standard small business cap of 60 training hours per trainee. Given the need for intensive training of new high technology and complexity of learning software applications, the trainees will need to complete 120 training hours. However, Zobrist is requesting a cap of 80 training hours per trainee, and the Company will assume the cost and expense of the additional hours.

Training Plan

This is the Company’s second ETP Agreement. The first project focused on workers job skills and business practices. This new proposal focuses more on computer skills and new technologies. Zobrist states that it needs to retrain its employees in skills to further the Company’s transition to a high performance workplace. In addition, Zobrist has expressed its need for ETP-funded training because it faces out-of-state competition, struggles to keep up with technology, and needs to build employees’ skills in a constantly changing environment.

To remain competitive as technology evolves, Zobrist has developed a company-wide training and employee development program. Workers will receive skills necessary to better understand customer requirements, deliver sophisticated products and services, and become more consistent and efficient.

Classroom/Laboratory and Videoconference will be provided as follows:

**Business Skills** – Training will be offered to all occupations. Training will provide trainees with a greater understanding of customer service, sales, organization, priority and company operations.

**Computer Skills** – Training will be offered to all occupations to utilize the new Cloud and Bluemix technologies and Adobe Experience Manager applications.

**Continuous Improvement** – Training will be offered to Developers, Project Leade, and Owners. Training will promote teamwork, improve services and processes that will help save time and enhance delivery processes.

**RECOMMENDATION**

Staff recommends approval of this proposal.

**PRIOR PROJECTS**

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

<table>
<thead>
<tr>
<th>Agreement No.</th>
<th>Location (City)</th>
<th>Term</th>
<th>Approved Amount</th>
<th>Payment Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>ET14-0100</td>
<td>Woodland Hills, Irvine</td>
<td>8/5/13 – 8/4/15</td>
<td>$49,920</td>
<td>$46,361 (93%) Earned in Review</td>
</tr>
</tbody>
</table>
Exhibit B: Menu Curriculum

Class/Lab Hours

8-80

Trainees may receive any of the following:

BUSINESS SKILLS

- Design and Merchandising
- IBM Partnerworld
- Marketing and Customer Acquisition
- Retail Industry
- Social Networking

COMPUTER SKILLS

- Adobe Experience Manager
- BitBucket
- Bluemix
- Cloudant Database Technology
- Computer User Usability Guidance
- Content Management System
- Coremetrics
- Cognos Advanced Analytics
- Cross-Browser Testing
- DemandTec
- Database 2
- Electronic Data Interchange
- Git (Software)
- Internet of Things
- IBM Commerce on Cloud
- IBM Sterling Commerce
- IBM WebSphere Application Server
- Integration Tools
  - Message Broker
  - Message Queue Series
  - Web Services
  - Cast Iron
  - Data Power
- JIRA (Software)
- JMeter
- Software as a Service
- Programming languages
  - Javascript
  - Java and J2EE (Java 2 Enterprise Edition)
  - HyperText Markup Language
  - Exchange Markup Language
  - Structured Query Language
  - Cascading Style Sheet
- Responsive Web Design
- Slack
- Tealeaf
- WebSphere Commerce Build and Deploy
- WordPress

**CONTINUOUS IMPROVEMENT**
- Agile Refresher
- Knowledge Transfer
- Process Improvement
- Social Relations
- Teambuilding

Reimbursement for retraining is capped at 80 total hours per-trainee, regardless of method of delivery.