

PANEL PACKET

August 2018





NOTICE / AGENDA

MEETING TIME/PLACE

Friday, August 24, 2018 at 9:30 a.m.
California Environmental Protection Agency, 1001 I Street
Sierra Hearing Room, Second Floor
Sacramento, CA 95814
Phone: (916) 327-5640

AGENDA

Call to Order by Chair	Barry Broad
<ul style="list-style-type: none">• Roll Call• Agenda• Minutes	
Report of the Executive Director	Stewart Knox
<ul style="list-style-type: none">• Legislative/Budget/Other• Request Motion to Adopt Consent Calendar Projects/Action	
Review and Action on Proposals	Diana Torres Anna Nastari Jana Lazarewicz
Presentation	Lis Testa
<ul style="list-style-type: none">• Broker Model & Training Vendor Limitation• Request Motion to remove Broker Model and Enact the Training Vendor Limitation	
Public Comment on Matters Not on the Agenda	
Agenda Items for Future Meetings	
Public Meeting Adjourns	

Under Government Code section 11123(a), all meetings of a state body are open and public, and all persons are permitted to attend any meeting of a state body, except as otherwise provided in that article. ETP may take action on any item listed in this Notice/Agenda. You can obtain further information about this Notice/Agenda by contacting Michael A. Cable, Legal Counsel, at (916) 327-5422, or Michael.Cable@etp.ca.gov, or sending a written request to Michael A. Cable, Legal Counsel, at Employment Training Panel, 1100 J Street, 4th Floor, Sacramento, California 95814. Written comments on agenda items should be submitted no later than 12:00 p.m. the business day before the meeting in order to afford adequate time to consider your comments.

This Notice/Agenda of Panel Meeting and related documents are available on the ETP website at www.etp.ca.gov. The dollar amounts shown in this Notice/Agenda are estimates only, subject to change up to and including the date of the Panel Meeting. Please continue to access the ETP website for current and updated information. In the event the Panel does not have a quorum at the Panel Meeting noticed herein, then those Panel Members in attendance will meet as a committee at the same time and place identified herein, and said Panel Members in attendance will meet as a committee in order to hear the items identified in this Notice/Agenda, but will not vote or take action. While ETP intends to webcast its meetings, it may not be possible to webcast the entire open meeting due to limitations on resources.

The meeting is accessible to the physically disabled. A person who needs a disability-related accommodation or modification in order to participate in the meeting, including without limitation auxiliary aids or services, may make a request by contacting Michael A. Cable, Legal Counsel, at (916) 327-5422, or Michael.Cable@etp.ca.gov, or sending a written request to Michael A. Cable, Legal Counsel, at Employment Training Panel, 1100 J Street, 4th Floor, Sacramento, California 95814. Providing your request so that it is received at least five (5) business days before the meeting will help ensure availability of the requested accommodation.

REVIEW AND ACTION ON PROPOSALS

These funding proposals are listed by Regional Offices and do not reflect the actual order of presentation. They will be considered by the Panel in accordance with a Table of Contents to be published on the ETP website no later than Monday, August 18, 2018 although the Panel may still change the order at the meeting. In regards to those items indicated below as an Amendment, please note that the dollar amount only reflects the proposed amendment amount, and not the total funding amount for the contract.

North Hollywood Regional Office

Brand Consulting Group, LLC dba Brand College -----	\$949,151
Chilton & Leste Management, Inc. -----	\$135,200
CHLB, LLC dba College Medical Center -----	\$390,000
Inland Boatmen's Union of the Pacific Joint Apprenticeship Committee Trust-----	\$263,050
Los Angeles & Orange Counties Air Conditioning and Refrigeration Joint Journeyman and Apprentice Training Committee-----	\$948,124
Marcum LLP -----	\$119,600
Procore Technologies, Inc. (CRITICAL PROPOSAL)-----	\$899,808
rPlanet Earth Los Angeles, LLC -----	\$150,436
Southern California Floor Covering Crafts Joint Apprenticeship Training Committee-----	\$350,830
Southern California Sheet Metal Joint Apprenticeship and Training Committee-----	\$948,480
Viasat, Inc. -----	\$301,236

San Diego Regional Office

Aire-Rite Air Conditioning & Refrigeration, Inc. -----	\$130,000
Asian Business Association, San Diego -----	\$22,240
Murrieta Chamber of Commerce (Amendment) -----	\$197,325
Simpson Strong-Tie Company Inc. (Amendment) -----	\$42,750
Southern California Surveyors Joint Apprenticeship Committee ---	\$314,750
Southwest Boulder & Stone, Inc. (Amendment) -----	\$81,900
Trace3, LLC-----	\$198,900
United Parcel Service, Inc. -----	\$308,334

San Francisco Bay Area Regional Office

Cablecom, LLC-----	\$163,800
Gagne Brothers Enterprises, Inc. dba Ben Franklin Plumbing-----	\$150,098
Jewish Vocational and Career Counseling Services -----	\$337,646
San Mateo County Electrical Joint Apprenticeship and Training Committee-----	\$905,955
Sheet Metal Workers' Local No. 104 and Bay Area Industry Apprentice and Journeyman Training Fund -----	\$1,612,671

Sacramento Regional Office

California Family Foods, LLC-----	\$99,450
Gilmore Heating & Air Conditioning, Inc. -----	\$199,914
K.W.P.H. Enterprises dba American Ambulance-----	\$599,248
O'Neill Beverages Co. LLC -----	\$241,150
SAFE Credit Union-----	\$408,595
Stanislaus Business Alliance, Inc.-----	\$129,838
Sunergy California LLC (CRITICAL PROPOSAL) -----	\$541,060

PROPOSALS APPROVED
BY DELEGATION ORDER FOR 7/17/18 – 8/13/18

≤ \$75,000	Approved Date	Approved Amount
<u>North Hollywood Regional Office</u>		
BGI Worldwide Logistics, Inc.	08/06/18	\$24,180
Bond Enterprises, Inc. (Amendment)	07/27/18	\$10,920
Cal-Duct, Inc.	08/10/18	\$45,760
Kamus Keller, Inc.	07/27/18	\$20,358
KBKG, Inc.	07/19/18	\$74,888
Perillo Industries, Inc. dba Century Electronics	07/27/18	\$18,564
<u>San Diego Regional Office</u>		
Car Sound Exhaust System, Inc. dba Magnaflow	07/18/18	\$72,072
Haskell & White LLP	07/18/18	\$72,956
University RX Specialists dba University Compounding Pharmacy	08/01/18	\$46,124
<u>San Francisco Bay Area Regional Office</u>		
C&H Sugar Company, Inc.	07/13/18	\$54,990
KC Partners Corp. dba B&T Service Station Contractors	08/10/18	\$31,200
Tencate Advanced Composites USA, Inc.	08/09/18	\$63,336
<u>Sacramento Regional Office</u>		
Fiore Di Pasta, Inc.	07/19/18	\$32,500
James E. Williams and Son, Inc.	07/19/18	\$52,130
Michael Martines Physical Therapist, Inc.	08/01/18	\$16,120



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M e m o r a n d u m

To: Panel Members

Date August 24, 2018

From: Stewart Knox
Executive Director

File: Panel Memo Doc.

Subject: **Directions to Meeting Site**

The Employment Training Panel will meet on FRIDAY, **August 24, 2018 at 9:30 a.m.**

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

Directions to the California Environmental Protection Agency - Sierra Hearing Room

From Sacramento International Airport:

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

From San Francisco

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



M e m o r a n d u m

To: Panel Members

Date August 24, 2018

From: Stewart Knox
Executive Director

File: Mtg. Site Memo

Subject: **Future Meeting Sites**

<p>August 24, 2018</p>	<p>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</p>
<p>September 28, 2018</p>	<p>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</p>
<p>October 26, 2018</p>	<p>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</p>
<p>NOVEMBER 2018</p>	<p>No Panel Meeting in November.</p>



**STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL**
California Environmental Protection Agency
1001 I Street
Sierra Hearing Room, Second Floor
Sacramento, CA 95814
July 27, 2018
(916) 327-5640

PANEL MEMBERS

Barry Broad
Chair

Janice Roberts
Vice-Chair

Gloria Bell
Member

Maral Farsi
Ex-Officio Member

Gretchen Newsom
Member

Rick Smiles
Member

Ernesto Morales
Member

Ali Tweini
Member

Executive Staff

Stewart Knox
Executive Director

Michael A. Cable
Legal Counsel

STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL
California Environmental Protection Agency
1001 I Street, Sierra Hearing Room, Second Floor
Sacramento, CA 95814
July 27, 2018

I. PUBLIC PANEL MEETING CALL TO ORDER

Chairperson Barry Broad called the meeting to order at 9:31 a.m.

II. ROLL CALL

Present

Barry Broad
Gretchen Newsom
Janice Roberts
Ernesto Morales
Ali Tweini
Rick Smiles
Maral Farsi (For Will Koch)

Absent

Gloria Bell
Will Koch

Executive Staff Present

Stewart Knox, Executive Director

Legal Counsel

Michael A. Cable

III. AGENDA

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

ACTION: Mr. Tweini moved and Ms. Newsom seconded the motion to approve the Agenda.

Motion carried, 6 - 0.

IV. MINUTES

It was questioned whether there were any changes and/or additions that need to be made to the Minutes from June 22, 2018. No changes were suggested or made.

ACTION: Ms. Roberts moved and Ms. Newsom seconded the motion that the Panel approve the Minutes from the June 22, 2018 meeting.

Motion carried, 6 - 0.

V. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director, welcomed new Panel Member Rick Smiles.

Mr. Knox reported that today's Panel Meeting concerns projects totaling just over \$18.62M, with approximately \$662,116 in Delegation Orders, for a grand total of just over \$19.2M.

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

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

It was reported, regarding Core Funds for Fiscal Year (FY) 2018/19: today the Panel will consider close to \$18.6M with an additional \$662K that upon the Panel approving the just over \$18.6M in projects for this year, ETP will have approximately \$67.9M for the remainder of FY 2018/19.

It was reported, regarding Delegation Orders: that all such project proposals are capped at \$75,000; that all such project proposals are to be approved by the Executive Director on a continuous flow basis; and that the 16 projects subject to Delegation Orders for today's Panel Meeting total just over \$662K.

It was reported, regarding 2018/19 total program funding to date: that approximately 580 projects have been submitted to the Panel, with a value of just over \$100M; and if all project proposals for today's Panel Meeting are funded today, that the Panel will have approved 112 projects, with a value of just over \$35M.

It was reported, regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at \$45M in demand, with \$33M in allocation; Multiple Employer Contract (MEC) requests are at \$13M in demand, with \$17M in allocation; Small Businesses requests are at \$5.2M in demand, with \$5.0M in allocation; Critical Proposals are at \$750K in demand, with \$4.1M in allocations; and Apprenticeship programs are at \$7.1M in demand, with \$7.6M in allocation. Overall demand is approximately \$71+M.

It was reported that the number of total projects in FY 2017/18 in the Regional Offices is 384; that the total number of projects currently in the Applications and Assessment Unit is 84; and that the number of total projects is 468.

It was reported that Staff is working hard to get the projects assigned out to the Regional Offices, and that to date about 82% of the projects have been assigned to the Regional Offices.

In order to best utilize resources as we move through the fiscal year, staff is focusing on development of priority projects. This is our standard process. There is no prohibition to funding non-priority projects. Those non-priority projects that are actively being developed will continue through the process. But, given the volume of pre-applications to be worked, staff is focusing on the projects that meet the Panel’s priorities as identified in the Panel’s 18/19 Strategic Plan first.

VI. LEGISLATIVE UPDATE

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

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

VII. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

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

Chairperson Broad asked for a motion to adopt Consent Calendar Items #1 through #23.

Baloian Packing Co. Inc.....	\$ 99,970
Bell-Carter Foods, Inc.....	\$169,442
Bourdreau Pipeline Corporation.....	\$103,532
California Long Term Care Education Center.....	\$178,840
Chilton and Leste Management, Inc. (WITHDRAWN).....	\$000,000
Courage Production, LLC.....	\$ 88,504
Doubleco Incorporated dba R & D Fasteners.....	\$ 87,750
ELROB, Inc. (Amendment).....	\$ 49,400
Fowler Packing Company, Inc.....	\$198,900
Georgia-Pacific Corrugated, LLC.....	\$129,480
Golden State Foods Corp.....	\$ 79,092
Greenheck Fan Corporation.....	\$188,240
North State Electrical Contractors, Inc.....	\$153,400
Paradigm Treatment Centers, LLC.....	\$197,600
Ricoh USA, Inc.....	\$199,456
South Bay Workforce Investment Board, Inc.....	\$131,536
Sun Hill Properties, Inc.....	\$188,600
Sunvair, Inc.....	\$ 98,800
SYSCO Riverside, Inc.....	\$ 66,150
The Ultimate Software Group, Inc.....	\$199,290
Vision Care Center, A Medical Group, Inc.....	\$152,828
White Lenson Diehl Evans, LLP.....	\$ 97,290
Woodbridge Glass, Inc.....	\$ 82,472

ACTION: Mr. Tweini moved and Ms. Roberts seconded the motion to approve the consent calendar for Items #1 through # 23.

Motion carried, 6 – 0.

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

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

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

Motion carried, 6 - 0.

IX. REVIEW AND ACTION ON PROPOSALS

Single Employers

Tab #24 – Trojan Battery Company, LLC

Ms. Torres presented a proposal on behalf of Trojan Battery Company, LLC (Trojan Battery) in the amount of \$247,000. Founded in 1925 and headquartered in Santa Fe Springs, Trojan Batter manufactures deep-cycle batteries, deep-cycle AGM and gel batteries. The company pioneered the development of deep-cycle battery technology for the golf industry, successfully introducing mobilization to the game of golf. Additional products have since prevailed with battery advances in renewable energy, transportation, floor machines, aerial work platforms, marine and recreational vehicles.

Ms. Torres introduced Stacy Navarrette, Human Resources Manager; and Judith Kriegsman, President, Chief Executive Officer of Judith's Training Services.

Mr. Tweini inquired about veteran participation.

Ms. Navarrette reported that they have veterans on board and are focusing on some recruiting strategies targeting veterans, but did not have any data on hand.

Ms. Newsom inquired about the safety of the workers in regards to lead dust accumulation in the manufacturing of lead batteries.

Ms. Navarrette described some of their safety initiatives, such as new air suction equipment to avoid exposure, and upgraded protective gear worn by the workers.

Mr. Tweini inquired about any protections to protect the public and the environment.

Ms. Navarrette explained how they strive to stay up to date with all TQMP regulations.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for Trojan Battery Company, LLC, in the amount of \$247,000.

Motion carried, 6 - 0.

Tab #25 – Rush Truck Centers of California, Inc.

Ms. Torres presented a proposal on behalf of Rush Truck Centers of California, Inc. (Rush Truck), in the amount of \$219,920. Founded in 1965 and headquartered in Fontana, Rush Truck operates a network of commercial vehicle dealerships primarily focused on selling commercial vehicles manufactured by Peterbilt, International, Hino, Ford, Isuzu, and Mitsubishi. The company also provides customers with a one-stop service center featuring sales of new and used commercial vehicles, aftermarket parts sales, service and repair facilities, financing, leasing, rental vehicles, CNG fuel systems, vehicle telematics products and insurance products. Customers include regional and national truck fleets, corporations, and local and state governments. The company has eight locations participating in this proposal (San Bernardino, Los Angeles, and San Diego Counties).

Ms. Torres introduced Michael J. McRoberts, Chief Operating Officer; Lacy Buckingham, Grant Manager; and Hal Meriwether, Regional Manager.

Mr. Broad asked Ms. Torres about the waiver request in the proposal.

Ms. Torres explained the Turnover Waiver Request stated on Page 4 of 6 of the proposal; and that Rush Tank was agreeable to imposition of a penalty.

Ms. Roberts inquired about who will be providing assistance in administering this ETP Contract.

Ms. Buckingham responded by indicating her involvement and stating that she helped administer other ETP contracts.

Mr. Meriwether stated he's the Regional Manager for California, and that he will be overseeing all of the locations in California executing the contracts.

Ms. Newsom inquired about the high staff turnover rate.

Mr. Meriwether noted various issues resulting in a high turnover rate; such as there not being enough technicians to meet market demands, the fact that technicians often leave the industry after a short period of time, and given the foregoing there's a constant competition among dealerships regarding technicians.

Ms. Buckingham noted that one of their big initiatives to improve retention is a mentorship program that is a team based strategy.

Ms. Newsom inquired about the wage progression from Service Tech 1 to Service Tech 5.

Mr. Meriwether explained that from Service Tech 1 to Service Tech 2 is from six months to a year; from Service Tech 2 to Service Tech 3 is another six months to a year; and the remainder progressions will depend on the trainee and required manufacturer training.

Mr. Broad inquired as to whether the progression from Service Tech 1 to Service Tech 5 is standard in the industry.

Mr. Meriwether explained how the Service Tech 1- 5 is very standardized across the industry.

Mr. Broad asked whether this ETP funding would assist in training service technicians to move up the progression.

Mr. Meriwether stated yes, and indicated this funding would particularly assist with entry level technicians.

ACTION: Ms. Newsom moved and Ms. Roberts seconded the motion to approve the proposal for Rush Truck Centers of California, Inc., in the amount of \$219,920.

Motion carried, 6 - 0.

Tab #26 – TTM Technologies, Inc.

Ms. Torres presented a proposal on behalf of TTM Technologies, Inc. (TTM), in the amount of \$612,560. Founded in 1999 and headquartered in Costa Mesa, TTM manufactures printed circuit boards and backplane assemblies for both original equipment manufacturers and electronic manufacturing services providers. The company serves a diversified customer base in various markets throughout the world, including manufacturers of networking and communications infrastructure products, personal computers, touch-screen tablets and mobile media devices (cellular phones and smart phones). The company also has customers in the commercial aerospace and defense industry; and the industrial and medical industries. The company has facilities in the U.S., Canada, China, and Hong Kong. TTM has 6 locations in California: Costa Mesa, Santa Ana, Anaheim, San Diego, San Jose, and Santa Clara that will be included in this project.

Ms. Torres introduced Jennifer Mahlmeister, Senior Training Manager Learning and Development.

Ms. Roberts inquired into the nature of the training, and after explaining how this is their fourth contract, noted that ETP funding is not intended to be a source of regular supplemental funding; but rather, TTM needs to figure out a way to provide its training without ETP funds. Ms. Mahlmeister stated that she shares the same concerns, and indicated that she has already raised the issue with management, and will use Ms. Roberts' comments as a means communicating her concerns to management.

Ms. Newsom asked how many workers are at the low wage range of \$14.53.

Ms. Mahlmeister stated that the majority are at the lower wage range because they are entry level operators and technicians.

Mr. Tweini asked how many veterans are participating in the program.

Ms. Mahlmeister indicated that they do not have a formal veterans recruiting program, but stated that they have 37 veterans; one of their HR Directors is a veteran; and they are looking to create a formal program.

Mr. Broad asked Mr. Knox to discuss the rules and recent changes to the rules regarding Substantial Contribution and repeat contractors.

Mr. Knox stated that ETP Legislation allows the Panel to impose a Substantial Contribution of 15%, 30%, and up to 50%, but the details have become very complicated over the years. Job Creation is exempt, and the analysis is per location, with staff and members finding the analysis too complex at times. Therefore, in Committee, a Repeat Contractor Rule was developed, which in a nutshell has a contractor in for two contracts years, then out for two. Because we just started that clock in July, you may or may not be held to a Substantial Contribution. The Panel may still impose that on a case by case basis. The Repeat Contractor Rule does start on the clock, and so this would be the first of your two in and two out potentially, but the Panel may impose the Substantial Contribution.

Ms. Roberts asked whether any Panel Members want to impose anything in this proposal.

Mr. Broad indicated he would go for that in this instance because this one company has received a lot of money in a very short period of time, but it is up to the Panel Members.

Ms. Roberts explained that a 15% deduction from the contract amount would be generous, and asked whether a 15% deduction would be acceptable.

Ms. Mahlmeister indicated that a 15% deduction in the contract amount would be acceptable.

Mr. Broad asked for a motion.

Ms. Roberts made a motion to approve the contract with the 15% deduction.

Ms. Torres clarified that the 15% deduction was as to the total contract amount.

Mr. Mahlmeister indicated that a 15% deduction as to the total contract amount was fine.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the approval to reduce the total amount of the proposal for a 15% Substantial Contribution for TTM Technologies, Inc., in the new amount of \$520,676..

Motion carried, 6 - 0.

Tab #27 – Vavrinek, Trine, Day and Co., LLP

Ms. Torres presented a proposal on behalf of Vavrinek, Trine, Day and Co., LLP (VTD), in the amount of \$217,488. Founded in 1948 VTD is an accounting firm offering audit, accounting, tax, fraud examination, and business consulting services. Headquartered in Rancho Cucamonga, VTD has nine California regional offices (San Mateo, Santa Clara, Alameda,

Los Angeles, Orange, San Diego, Sacramento, Riverside and Fresno), and an office in Phoenix, AZ, that provides tax advice, financial statement audits, employee benefit plans, audit and business advisory services to businesses, higher education institutions, government agencies, and not-for-profit organizations. All California facilities are participating in this project.

Ms. Torres introduced Marilyn Brindle, Certified Public Accountant and Quality Control Partner.

There were no questions by any Panel Member.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for Vavrinek, Trine, Day and Co., Inc., in the amount of \$217,488.

Motion carried, 6 - 0.

Tab #28 – Boehringer Ingelheim Fremont, Inc.

Ms. Nastari presented a proposal on behalf of Boehringer Ingelheim Fremont, Inc., (BIFI), in the amount of \$899,522. BIFI is a subsidiary of the family-owned parent corporation-Boehringer Ingelheim (Boehringer). Boehringer is a global pharmacology corporation, which researches and produces human and animal pharmaceuticals. BIFI is a contract biopharmaceutical development and manufacturing (small scale to commercial) offering drug-substance manufacturing to fill/finish, packaging and medical device assembly. BIFI produces pharmaceuticals for patients with serious diseases and medical conditions like cancer and chronic inflammatory disorders.

Ms. Nastari introduced Cheyenne Cook, Director, State Government Affairs; Alfonso Perez, Training Specialist; Susan Harrington, Senior Manager of Quality Systems, Training and Records Management; and Phillip Herrera, Consultant.

Ms. Roberts explained how this project is different from the last one; as this one concerns a Critical Proposal and new hires.

Ms. Roberts indicated that this looks like a great contract.

Ms. Newsom applauded the proposal for its high wages and not taking the incentive under job creation. Ms. Newsom also thanked them for the creation of 150 new jobs.

Mr. Tweini inquired about the veteran population under the contract.

Ms. Cook could not speak to the actual veterans on site, but as a company, they have two programs that benefit veterans: a Veterans Resource Group, and also cooperative relationship with American Corporate Partners.

Mr. Tweini inquired about the training program.

Ms. Harrington explained that she is the head of training; discussed their recordkeeping procedures and classroom training; and provided a description of their productive lab training.

Mr. Tweini made a motion to approve.

Ms. Farsi seconded the motion and expressed gratitude for their work on biologics.

ACTION: Ms. Roberts moved and Ms. Farsi seconded the motion for approval of the proposal for Boehringer Ingelheim Fremont, Inc., in the amount of \$899,522.

Motion carried 6 -0 .

Tab #29 – Dome Construction Corporation

Ms. Nastari presented a proposal on behalf of Dome Construction Corporation (Dome), in the amount of \$241,800.

Founded in 1969 and headquartered in South San Francisco, Dome provides construction management services including pre-construction, construction, energy optimization, equipment installation, seismic bracing and more. Dome's customers span commercial health care, industrial plants, educational facilities, and high technology industries. This is the Company's first ETP funding proposal and training is planned for five sites in northern California (South San Francisco, Emeryville, San Francisco, San Jose, and Thousand Oaks).

Ms. Nastari introduced Steve Long, Learning and Development, Director; and Dome and Meggie Chapman, Economic Incentives Advising Group.

Ms. Roberts stated that this is a great first time contract with high wages.

ACTION: Ms. Newsom moved and Ms. Roberts seconded the motion for approval of the proposal for Dome Construction Corporation, in the amount of \$241,800.

Motion carried, 6 - 0.

Tab #30 – G & C Auto Body, Inc.

Ms. Nastari presented a proposal on behalf of G & C Auto Body, Inc. (G&C), in the amount of \$249,636. G & C was established in 1972 and has 13 locations in Northern California all of which will participate in ETP-funded training (Fairfield, Larkfield, Novato, Petaluma, Rohnert Park, San Raphael, Santa Rosa, Sonoma, Ukiah, Vacaville, Vallejo, Windsor, Bencia). G&C provides automotive repair services and sells parts and accessories to California consumers, and national insurers such as Geico and State Farm. This is G&C's first ETP agreement.

Ms. Nastari introduced Britten Smith, Regional Manager; and Jill Meeuwsen, Synergy Management Consultants.

Mr. Tweini thanked them for their service, and thanked them for their work with veterans.

Ms. Roberts asked for clarification about the retention modification.

Mr. Nastari and Mr. Knox explained that the retention modification that is stated on page 6 of 6 of the Proposal.

ACTION: Mr. Tweini moved and Mr. Smiles seconded the motion for approval of The proposal for G & C Auto Body, Inc., in the amount of \$249,636.

Motion carried 6 – 0.

Tab #31 – George Chiala Farms, Inc.

Ms. Nastari presented a proposal on behalf of George Chiala Farms, Inc., (George Chiala), in the amount of \$367,510. Founded in 1972 and headquarter in Morgan Hill, George Chiala is a family operated agricultural business that specializes in the production of vegetables such as carrots, jalpenos, garlic, green onions, mushrooms, and bell peppers. Depending on the customer's order, prepared vegetables can be freshly peeled, diced, roasted, pureed, or sliced. Each year, the company processes over 120 million pounds of vegetables to ship to their customers throughout the United States. This is George Chiala's first ETP proposal.

Ms. Nastari introduced Melissa Munoz, Human Resource Generalist; Linda Munoz, Director of Human Resources; and Sara Lopez, Supervisor of Human Resources.

Mr. Tweini asked about how they heard about ETP.

Ms. Munoz explained that she has previous experience with ETP contracts with another company.

Mr. Tweini asked about veteran participation.

Ms. Munoz had nothing specific, but indicated that there's a pretty large increase of veterans working in their facilities maintenance and mechanical departments.

Mr. Broad asked what percentage of the employees are seasonal.

Ms. Munoz indicated approximately 25% this year, which is lower than years past.

Ms. Roberts asked about their experience with ETP contracts.

Ms. Munoz stated that she has extensive knowledge and experience with ETP contacts, and administered the contracts for Pacific Scientific.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for George Chiala Farms, Inc., in the amount of \$367,510.

Motion carried, 6 - 0.

Tab #32 – Ly Brothers Corp. dba Sugar Bowl Bakery

Ms. Nastari presented a proposal on behalf of Ly Brothers Corp., dba Sugar Bowl Bakery (Ly Brothers), in the amount of \$253,760. Founded in 1984 and headquartered in Hayward, Ly Brothers develops quality baked goods including Madeleines, Petite Palmiers, and Petite Brownie Bites. One of the largest bakeries operating in Northern California, Ly Brothers distributes to grocers/supermarket chains (Safeway, Walmart & Krogers), warehouse clubs

(Costco and Sam's Club) and food service institutions. Its products are also sold across the US with international distribution in Mexico, Australia, Korea, Japan, and Taiwan.

Ms. Nastari introduced Theresa Martinez, Human Resource Manager and Angeles Jones, Vice President of Development at TGII.

Ms. Roberts inquired about the company's history.

Ms. Martinez said that the story with the company is that they were refugees, Vietnam refugees and they came to San Francisco. There were five brothers that worked for a bakery in San Francisco, and the owner was going to sell the company. So the brothers pulled their money together, \$40,000, and they purchased the bakery from that. They opened operations, and they provided a lot of pastries to the hotels in San Francisco. Then they decided to focus on their core products which were three: the brownies, the Madelines, and the Petite Palmiers. So the facility moved to Hayward, where we have two major plants.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for Ly Brothers Corp. dba Sugar Bowl Bakery, in the amount of \$253,760.

Motion carried, 6 - 0.

Tab #33 – Pinterest

WITHDRAWN

Tab #34 – SYSCO Central California, Inc.

Ms. Lazarewicz presented a proposal on behalf of SYSCO Central California, Inc. (Sysco Central), in the amount of \$443,210. Founded in 1938 and located in Modesto, Sysco Central warehouses, distributes, and delivers a broad range of food products, beverages, food-service equipment, and supplies to restaurants, schools, hotels, assisted-living facilities, health care institutions, government facilities, and other businesses. Food and related products include fresh and frozen meat, poultry seafood, fruits and vegetables, canned and dry products, paper and disposable products, cleaning supplies, kitchen equipment, and medical supplies. This is Sysco Central's fifth ETP Agreement and fourth in the last 5 years. All training will take place at Sysco Central's Modesto location.

Ms. Lazarewicz introduced Pete Zahos, Vice President of Human Resources; and Bill Sacks, consultant.

Mr. Broad asked about Sysco's corporate structure.

Mr. Zahos stated there are 8 entities, but they are fully independent of one another or are subsidiaries of a larger Sysco holding company. The headquarters in Houston, Texas.

Mr. Broad asked whether Sysco Corporation is a publicly traded company?

Mr. Zahos indicated yes.

Mr. Broad asked whether the subsidiary companies are publicly traded?

Mr. Zahos indicated no.

Mr. Broad asked whether they are a wholly owned subsidiary.

Mr. Zahos indicated yes.

Mr. Broad asked whether there are any other Sysco projects in the pipeline.

Mr. Zahos said he's not aware of any at this point, but he's sure there are.

Ms. Newsom questioned about veterans being paid less than the retrainees.

Mr. Zahos stated that the numbers in the proposal do not reflect the total compensation that these folks make because we pay an incentive and bonus for performance. So we have warehouse associates today that are making over \$100K a year.

Mr. Sacks noted that they left off those bonuses because they were not necessary in order to give higher numbers.

Ms. Newsom clarified that veterans are not being paid less than their counterparts, and there was further discussion about how the format of proposals and showing accurate information.

Ms. Newsom suggested that this is an issue that should be presented to Committee.

Ms. Farsi commented on Sysco's structure, and there was extensive discussion about centralized support within the company and public perception of these various entities.

Mr. Zahos further discussed the corporate structure; reiterated that these are separate and distinct legal entities; and they have their own profit and loss responsibility.

Ms. Roberts clarified with Ms. Lazarewicz that this is a non-priority services industry.

Ms. Roberts made a motion to impose a 15% Substantial Contribution.

ACTION: Ms. Roberts moved and Ms. Newsom seconded the motion to apply Substantial Contribution of 15% to the proposal for SYSCO Central California, Inc. for the new amount of \$368,228.

Motion carried 6 – 0.

Multiple Employer Contracts

Tab #35 – American Education Systems, Inc. dba American College Healthcare Technology

Ms. Torres presented a proposal on behalf of American Education Systems, Inc., dba American College Healthcare Technology (ACH) in the amount of \$382,800. Founded in 1993, ACH is a learning institution that specializes in health education, Computer-Aided Design (CAD), and Building Information Modeling technology (BIM). ACH is approved by the Bureau for Private Postsecondary Education to provide CAD/BIM Technology training. ACH will provide training in CAD and BIM software employers in the fields of engineering, architecture, construction, manufacturing, and similar industries.

Ms. Torres introduced Amir Baniassad, CEO and President; and Steve Duscha, consultant.

Ms. Roberts asked who would be administering this contract.

Mr. Duscha stated they have an experienced administrator.

Ms. Newsom asked for clarification regarding the nexus between Healthcare and Technology.

Mr. Baniassad stated that there are two different wings: one is technology, and one is medical.

Ms. Newsom asked and Mr. Baniassad clarified that about 80-90% of the students are on the healthcare side.

ACTION: Ms. Roberts moved and Ms. Newsom seconded the motion for approval of the proposal for American Education Systems, Inc., dba American College Healthcare Technology in the amount of \$382,800.

Motion carried, 6 - 0.

Break taken @ 11:00 a.m.

Meeting called back to order @ 11:23 a.m.

NOTE: Maral Farsi who was representing Go-Biz left during the break to catch a plane. This left five (5) remaining panel members. There is still a quorum.

Tab #36 – Building Skills Partnership

Ms. Torres presented a proposal on behalf of Building Skills Partnership (BSP), in the amount of \$1,798,200. BSP is a statewide non-profit collaboration between the Service Employees International Union-United Service Workers West (SEIU-USWW) Local 1877, signatory employers, and community leaders. BSP's mission is to improve the quality of life of low-wage workers in the building service sector, by increasing their skills and opportunities for career advancement. In March 2016, BSP piloted and implemented an emergency response

and preparedness training program at Los Angeles International Airport (LAX). The training focused on developing skills in response to a shooting incident.

Ms. Torres introduced Aida Cardenas, Executive Director; Sara Caughey, LAX Program Coordinator BSP; Andrew Gross Gartan, SEIU USWW Research Director and Regional Vice President; and Jeff Habib, Director of Safety with G2 Secure Staff, LLC.

A presentation was made regarding the background and need related to this airport training.

Mr. Broad asked whether TSA and the airport police and other non-private contractor entities are working together.

Mr. Gartan indicated that they are all working together.

Ms. Roberts asked for clarification regarding training coordination.

Ms. Cardenas explained that training coordination is an issue due to having to pull people from the line, so they are providing two 8-hours sessions and some 4-hour sessions.

Ms. Roberts asked whether they have multiple instructors to cover 4,000 employees.

Ms. Cardenas said yes.

Ms. Roberts expressed concern over the size of the project, and asked whether they are going to train individually or by way of a computer setup.

Ms. Cardenas said that's actually something they are going to be building in partnership with the employers. Ms. Cardenas stated that some of the conversations and suggestions have been around first aid and CPR certification; and also around drills, actual drills, and then give them the time and skill to incorporate drills.

Ms. Roberts said that she think it's a great program, but is concerned that it's too ambitious.

Mr. Broad asked about the non-union companies, and whether this training program is standardized training for everyone.

Ms. Cardenas explained that it's a hybrid of regulations and training, but that they are putting a plan together and submitted it to the LAWA on a company by company basis.

Mr. Gartan discussed the complexities of this training and some of the issues arising from the fact that there are multiple vendors on site.

Mr. Broad commented on the need to for this training and questioned why this hasn't happened before now.

Mr. Broad and Mr. Gartan commented about how this sort of training is cutting edge, and might end up being something that is implemented on a statewide level.

Ms. Newsom questioned the low wages stated in the proposal, and asked whether there are other contributions, such as healthcare and retirement.

Ms. Cardenas stated that there are healthcare contributions.

Mr. Gartan stated that there is not a retirement fund, but that there is healthcare, paid time off, and a few other benefits.

Ms. Newsom thanked them for their work in addressing workplace safety issues.

Mr. Tweini commented about how this training program may become a statewide or national program.

Mr. Broad made a motion to approve this project.

Ms. Roberts seconded the motion.

ACTION: Mr. Broad moved and Ms. Roberts seconded the motion for approval of the proposal for Building Skills Partnership in the amount of \$1,798,200.

Motion carried 5 - 0.

Tab #37 – First Software USA dba Oxford Institute of Technology

Ms. Torres presented a proposal on behalf of First Software USA dba Oxford Institute of Technology (OIT), in the amount of \$372,902. Founded in 1999 and located in Encino, OIT is a BPPE approved private training agency that specialized in Information Technology (IT). The training agency offers a wide variety of computer related and advanced technology courses. OIT serves a multitude of industries such as aerospace, insurance, computer services, media, software development and security. This will be the company third ETP agreement, and the first in five years.

Ms. Torres introduced Naved Nizami, Director of Programs; and John Brauer of Cal Labor Fed.

Mr. Tweini asked whether this is job creation or retraining current employees.

Ms. Nizami indicated that these are retraining current employees.

Ms. Roberts and Ms. Torres clarified that there is no relation to Oxford College.

ACTION: Ms. Roberts moved and Mr. Tweini seconded the motion for approval of the proposal for First Software USA dba Oxford Institute of Technology in the amount of \$372,902.

Motion carried, 5 - 0.

Mr. Broad noted that all of the remaining proposals arise from an apprenticeship program subject to collective bargaining, and in the interest of time management, suggested that the remaining proposals be moved along in an expedited process. Hearing no objection, Mr. Broad proceeded with the remaining proposals.

Tab #38 – Kern County Electrical Joint Apprenticeship & Training Committee

Ms. Torres presented a proposal on behalf of Kern County Electrical Joint Apprenticeship & Training Committee (Kern Electrical JATC), in the amount of \$278,585. Founded over 52 years ago, Kern Electrical JATC is a non-profit training organization dedicated to providing up-to-date industry skills training and secure high-quality job opportunities for its members. The JATC trains electricians to install power, lighting, controls and other electrical equipment in commercial, industrial and residential facilities. Kern Electrical JATC is governed by a Board of Trustees comprised of three labor and three management representatives, and is a joint effort of the International Brotherhood of Electrical Workers (IBEW) Local 428 and the National Electrical Contractors Association (NECA).

Ms. Torres introduced Greg Rogers, Training Director.

There were no questions by any Panel Member.

ACTION: Mr. Smiles moved and Mr. Tweini seconded the motion for approval of the proposal for Kern County Electrical Joint Apprenticeship & Training Committee in the amount of \$278,585.

Motion carried, 5 - 0.

Tab #39 – Ventura County Electrical Joint Apprenticeship & Training Trust Fund

Ms. Torres presented a proposal on behalf of Ventura County Electrical Joint Apprenticeship & Training Trust Fund (Ventura JATC) in the amount of \$325,330. Founded in 1977, Ventura JATC is a joint effort of the International Brotherhood of Electrical Workers Local 952 and the National Electrical Contractors Association (NECA). The Ventura JATC is comprised of labor and management representatives and is governed by a Board of Trustees. With approximately 100 participating employers, the union represents over 400 electricians in Ventura County.

Ms. Torres introduced Steve Earhart, Director.

No questions from the Panel.

There were no questions by any Panel Member.

Mr. Broad asked for any objection to substituting the prior unanimous roll call. Hearing none, the proposal was approved.

ACTION: Mr. Chair asked Panel Members if any had objections to his invoking the substituted roll call and approving the proposal for Ventura County Electrical Joint Apprenticeship & Training Trust Fund in the amount of \$325,330. No objections were made and the motion passed with all Panel Members in favor.

Motion carried, 5 - 0.

Tab #40 – California Labor Federation, AFL-CIO

Ms. Nastari presented a proposal on behalf of the California Labor Federation, AFL-CIO (CalFED), in the amount of \$1,736,738. CalFED seeks funding for its sixth statewide “Building Green Skills” training program. This project will be coordinated by the CalFED Workforce and Economic Development program. This will be the tenth ETP Agreement with CalFED, and the fourth in the last five years. Founded in 1901, CalFED is an umbrella organization comprised of 1,200 unions, representing 2.1 million union members in manufacturing, retail, construction, hospitality, the public sector, healthcare, entertainment and other industries in California. Through this proposal, CalFED will continue to serve its membership working in construction.

Ms. Nastari introduced John Brauer, Executive Director of Workforce Economic Development.

There were no questions from the Panel.

There were no questions by any Panel Member.

Mr. Broad asked for any objection to substituting the prior unanimous roll call. Hearing none, the proposal was approved.

ACTION: Mr. Chair asked Panel Members if any had objections to his invoking the substituted roll call and approving the proposal for California Labor Federation, AFL-CIO in the amount of \$1,736,738. No objections were made and the motion passed with all Panel Members in favor.

Motion carried, 5 - 0.

Tab #41 – Carpenters Training Committee for Northern California

Ms. Nastari presented a proposal on behalf of Carpenters Training Committee for Northern California (CTCNC), in the amount of \$949,588. CTCNC is the educational organization that provides Pre-Apprentice, Apprentice, and Journeyman training services for union carpenters throughout Northern California. CTCNC is funded by a joint labor and management trust, as agreed to in collective bargaining. The CTCNC Apprenticeship training program has been established for many years as approved by the Division of Apprenticeship Standards (DAS). This is the eighth ETP Agreement between ETP and CTCNC, the sixth within the last five years.

Ms. Nastari introduced Mark Fuchs, Executive Director.

There were no questions from the Panel.

There were no questions by any Panel Member.

Mr. Broad asked for any objection to substituting the prior unanimous roll call. Hearing none, the proposal was approved.

ACTION: Mr. Chair asked Panel Members if any had objections to his invoking the substituted roll call and approving the proposal for Carpenters Training Committee for Northern California in the amount of \$949,588. No objections were made and the motion passed with all Panel Members in favor.

Motion carried, 5 - 0.

Tab #42 – District Council 16 Northern California Journeymen and Apprentice Training Trust Fund

Ms. Nastari presented a proposal on behalf of District Council 16 Northern California Journeymen and Apprentice Training Trust Fund (DC26 JATTF), in the amount of \$1,755,776. DC16 JATTF was formed in June of 2006. The DC16 JATTF is comprised of three formerly separate training trusts that have been merged into one in order to consolidate expenses and focus revenue on training and infrastructure. District Council 16 covers four “master” collective bargaining agreements representing four trades: Floorcovering Installers, Painters, Glaziers, and Drywall Finishers. This is the fourth ETP Agreement between ETP and DC 16 JATTF in the last five years. This is the second time a Veterans component has been included.

Ms. Nastari introduced Mark Watchers, Chief Financial Officer.

No questions from the Panel.

There were no questions by any Panel Member.

Mr. Broad asked for any objection to substituting the prior unanimous roll call. Hearing none, the proposal was approved.

ACTION: Mr. Chair asked Panel Members if any had objections to his invoking the substituted roll call and approving the proposal for District Council 16 Northern California Journeymen and Apprentice Training Trust Fund in the amount of \$1,755,776. No objections were made and the motion passed with all Panel Members in favor.

Motion carried, 5 - 0.

Tab #43 – Northern California District Council of Laborers Construction Craft Laborers Joint Apprenticeship Training Center

Ms. Nastari presented a proposal on behalf of Northern California District Council of Laborers Construction Craft Laborers Joint Apprenticeship Training Center (No. CA Laborers JATC), in

the amount of \$949,815. In 1995, the Northern California District Council of Laborers (representing labor) and the Associated General Contractors of California (representing employers) created the Laborers Training and Retraining Trust Fund for Northern California and the Laborers Joint Apprenticeship Training Center (No. CA Laborers JATC). Today the JATC served eight Northern California Laborers Union Locals (73, 185, 261, 270, 294, 304, 324, and 1130), representing 29,000 journeymen and 3,400 apprentices who work as construction craft laborers.

Ms. Nastari indicated that the JATC requests that first year apprentices be allowed to participate in ETP funded training. Typically, the apprentices are put into two different levels, but in this case, the apprentices are allowed to select from different sets of courses that correspond to their skill level. So it's really difficult to identify if they are a first year or a second year training apprentice. Accordingly, Ms. Nastari stated that they are asking to include first year apprentices.

There were no questions by any Panel Member.

Mr. Broad asked for any objection to substituting the prior unanimous roll call. Hearing none, the proposal was approved.

ACTION: Mr. Chair asked Panel Members if any had objections to his invoking the substituted roll call and approving the proposal for Northern California District Council of Laborers Construction Craft Laborers Joint Apprenticeship Training Center in the amount of \$949,815. No objections were made and the motion passed with all Panel Members in favor.

Motion carried, 5 - 0.

Tab #44 – Pipe Trades Joint Apprenticeship and Training Committee of Santa Clara and San Benito Counties

NOTE: This has an amount change from \$972,816 to \$949,244. They plan to train 247 apprentices and Journeymen, and not the 253 that was initially identified. They will also be training 20 veteran apprentices.

Ms. Nastari presented a proposal on behalf of Pipe Trades Joint Apprenticeship and Training Committee of Santa Clara and San Benito Counties (Pipe Trades JATC), in the amount of \$949,244. The Pipe Trades JATC opened the Lloyd E. Williams Pipe Trades Training Center in 1961 in San Jose. The training center serves 2,200 union members represented by the Plumbers, United Association Local Union 393. The JATC was created in collective bargaining between Local 393 and management represented by the South Bay Piping Industry and the Santa Clara Valley Contractors Association. This will be Pipe Trades JATC's fifth ETP Agreement, and the fourth in the last five years.

Ms. Nastari introduced Carl Cimino, Director; and Jan Borunda, Cal Labor Fed.

No questions from the Panel.

There were no questions by any Panel Member.

Mr. Broad asked for any objection to substituting the prior unanimous roll call. Hearing none, the proposal was approved.

ACTION: Mr. Chair asked Panel Members if any had objections to his invoking the substituted roll call and approving the proposal for Pipe Trades Joint Apprenticeship and Training Committee of Santa Clara and San Benito Counties in the amount of \$949,244. No objections were made and the motion passed with all Panel Members in favor.

Motion carried, 5 - 0.

Tab #45 – United Association Local Union 342 Joint Apprenticeship and Training Committee

Ms. Nastari presented a proposal on behalf of United Association Local Union 342 Joint Apprenticeship and Training Committee (UA Local 342 JATC), in the amount of \$841,050. The UA Local 342 JATC trainings Apprentices and Journeymen for the piping industry in Northern California. The JATC serves 2,000 Journeymen and 520 Apprentices working primarily in Alameda and Contra Costa Counties. This will be UA Local 342 JATC's fourth ETP Agreement, and the fourth in the last five years.

Ms. Nastari introduced Steve Apperson, Training Coordinator, Steamfitters/Welders.

No questions from the Panel.

There were no questions by any Panel Member.

Mr. Broad asked for any objection to substituting the prior unanimous roll call. Hearing none, the proposal was approved.

ACTION: Mr. Chair asked Panel Members if any had objections to his invoking the substituted roll call and approving the proposal for United Association Local Union 342 Joint Apprenticeship and Training Committee in the amount of \$841,050. No objections were made and the motion passed with all Panel Members in favor.

Motion carried, 5 - 0.

Tab #46 – Central Valley Mother Lode Plumbers, Pipe and Refrigeration Fitters Joint Apprenticeship Training Committee

Ms. Lazarewicz presented a proposal on behalf of Central Valley Mother Lode Plumbers, Pipe and Refrigeration Fitters Joint Apprenticeship Training Committee (Central Valley), in the amount of \$227,799. Central Valley was established in 1955. In 1997, Local 492 (Stockton) and Local 437 (Modesto) merged with it to create the Plumbers, Pipe and Refrigeration Fitters Local Union 442. Central Valley is funded by signatory employers pursuant to collective bargaining. Central Valley consists of equal representatives from labor and employers. This is the fifth ETP Agreement with Central Valley, the fourth in the last five years. This is the second project including veterans component.

Ms. Lazarewicz introduced Greg Vincelet, Training Coordinator; Jan Borunda/John Brauer, Consultant Cal Labor Fed; and Kelly Greer, Consultant.

No questions from the Panel.

There were no questions by any Panel Member.

Mr. Broad asked for any objection to substituting the prior unanimous roll call. Hearing none, the proposal was approved.

ACTION: Mr. Chair asked Panel Members if any had objections to his invoking the substituted roll call and approving the proposal for Central Valley Mother Lode Plumbers, Pipe and Refrigeration Fitters Joint Apprenticeship Training Committee in the amount of \$227,799. No objections were made and the motion passed with all Panel Members in favor.

Motion carried, 5 - 0.

Tab #47 – Central Valley Roofers, Waterproofers & Allied Workers Joint Apprenticeship and Training Committee

Ms. Lazarewicz presented a proposal on behalf of Central Valley Roofers, Waterproofers & Allied Workers Joint Apprenticeship and Training Committee (Central Valley Roofers), in the amount of \$174,980. Founded in 1919 and located in Fresno, Central Valley Roofers is jointly sponsored by Roofers and Waterproofers Local 27. Central Valley Roofers trains Apprentices and Journeymen for the roofing and waterproofing industry. Central Valley Roofers serve 300 union members across seven counties (Fresno, Madera, Kings, Tulare, Kern, Mono, Inyo). There are five signatory employers, 40% of which are small businesses. The training Center is located in Fresno County and offers apprentice programs (Roofer and Waterproofer) accredited through the Division of Apprenticeship Standards. This is Central Valley Roofers' first ETP Agreement.

Ms. Lazarewicz introduced Gabriel Perea, Director; Dan Smith, Coordinator; and Steve Duscha, consultant.

Ms. Newsom requested to hear from Central Valley Roofers.

Mr. Perea provided background regarding Central Valley Roofers; including that Mr. Perea is a veteran, Central Valley Roofers supports veterans, and Central Valley Roofers is actively recruiting woman into the roofing trade.

There were no other questions by any Panel Member.

Mr. Broad asked for any objection to substituting the prior unanimous roll call. Hearing none, the proposal was approved.

ACTION: Ms. Newsom moved and Ms. Roberts seconded the motion for approval of the proposal for Central Valley Roofers, Waterproofers and Allied Workers Joint Apprenticeship & Training Committee in the amount of \$174,980.

Motion carried, 5 - 0.

Tab #48 – Fresno Area Plumbers, Pipe and Refrigeration Fitters Joint Apprenticeship Training Committee

Ms. Lazarewicz presented a proposal on behalf of Fresno Area Plumbers, Pipe and Refrigeration Fitters Joint Apprenticeship Training Committee (Fresno Area Plumbers), in the amount of \$335,612. Founded in 1942, Fresno Area Plumbers trains Apprentices and Journeymen for the piping industry. Fresno Area Plumbers serves 600 union members across 4 counties (Fresno, Madera, Kings and Tulare), and consists of three management representatives from the Mechanical Contractors Association and three members from UA Local 246 representing labor. There are 18 signatory employers, 90% of which are small businesses. This is Fresno Area Plumbers' third ETP Agreement and third in the last five years. This is the second time Veterans have been introduced as a distinct population of Apprentice trainees.

Ms. Lazarewicz introduced Robert Topete, Director of Training; Jan Borunda/John Brauer, Consultant; and Kelly Greer, Consultant.

No questions from the Panel.

There were no questions by any Panel Member.

Mr. Broad asked for any objection to substituting the prior unanimous roll call. Hearing none, the proposal was approved.

ACTION: Mr. Chair asked Panel Members if any had objections to his invoking the substituted roll call and approving the proposal for Fresno Area Plumbers, Pipe and Refrigeration Fitters Joint Apprenticeship Training Committee in the amount of \$335,612. No objections were made and the motion passed with all Panel Members in favor.

Motion carried, 5 - 0.

Tab #49 – Fresno, Madera, Kings and Tulare Counties Electrical Industries Joint Apprenticeship and Training Committee

Ms. Lazarewicz presented a proposal on behalf of Fresno, Madera, Kings and Tulare Counties Electrical Industries Joint Apprenticeship and Training Committee (Fresno Electrical JATC), in the amount of \$459,917. Fresno Electrical JATC provides up-to-date skills training and secures high-quality job opportunities for its members. The Fresno Electrical JATC is governed by a Board of Trustees comprised of labor and management representatives, and is a joint effort of the International Brotherhood of Electrical Workers (IBEW Local 100 and the National Electrical Contractors Association. All trainees are members of IBEW Local 100

and located in Fresno, Madera, Kings and Tulare Counties (Region). This is Fresno Electrical JATC's third ETP Agreement in the last five years.

Ms. Lazarewicz introduced Chuck Riojas, Financial Secretary/Treasurer, Business Agent for IBEW Local 100; Jan Borunda, consultant; and Kelly Greer, consultant.

No questions from the Panel.

There were no questions by any Panel Member.

Mr. Broad asked for any objection to substituting the prior unanimous roll call. Hearing none, the proposal was approved.

ACTION: Mr. Chair asked Panel Members if any had objections to his invoking the substituted roll call and approving the proposal for Fresno, Madera, Kings and Tulare Counties Electrical Industries Joint Apprenticeship and Training Committee in the amount of \$335,612. No objections were made and the motion passed with all Panel Members in favor.

Motion carried, 5 - 0

X. GENERAL PUBLIC COMMENT

There was no public comment.

XII. MEETING ADJOURNMENT

Meeting adjourned at 12:20 p.m.

Single Employer Contractor

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

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

These features apply to core program funding.

Multiple Employer Contractor

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

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

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

Retraining

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

New Hire Training

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

These features apply to core program funding.

Delegation Order Process

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



Memorandum

To: Panel Members Date: August 24, 2018

From: Stewart Knox, Executive Director File:

Subject: Action Items: Broker Model & Training Vendor Limitation

Item #1: Removal of the Broker Model

ETP staff proposes the removal of the Broker Model Pilot. This item was discussed by Panel Committee, which voted to move the removal of the Broker Model Pilot to Panel at their March, 2018 meeting.

In summary, the Broker Model Pilot limits the amount of training a single training vendor on a Multiple Employer Contract (MEC) can provide to 50% of the training on any project. There are additional ways to apply the Broker Model Pilot, which are not feasible for staff. The Pilot has not worked as intended, and this limitation is no longer needed.

Staff is requesting a motion to remove the Broker Model Pilot, effective immediately, as was recommended by Panel Committee.

Item #2: Training Vendor Limitations

ETP staff is proposing a limit to the services that a training vendor may provide; namely, that a training vendor may only receive costs for providing training, and may not receive any development, admin, or support costs from the main ETP contractor they are sub-contracting with. WASC (Western Association of Schools and Colleges), ACCJC (Accrediting Commission for Community and Junior Colleges) and BPPE (Bureau of Private Post-Secondary Education) accredited institutions are exempt from this limitation. Other training vendors that would like to be exempted may request an exemption from Executive Staff, to be approved on a case-by-case basis.

This item was brought before Panel Committee at their June, 2018 meeting. The Committee voted to move this item to full Panel for consideration.

Staff is requesting a motion to limit training vendors (with the exception of WASC, ACCJC, and BPPE approved entities, and those training vendors that have received an exemption on a case-by-case basis from Executive Staff) to only receive payment for

training delivery services, and to not allow training vendors to receive any development, administration, or support costs from the ETP Contractor they are sub-contracted with.



RETRAINEE - JOB CREATION

Training Proposal for:

Aire-Rite Air Conditioning & Refrigeration, Inc.

Agreement Number: ET19-0196

Panel Meeting of: August 24, 2018

ETP Regional Office: San Diego

Analyst: R. Swier

PROJECT PROFILE

Contract Attributes:	Priority Rate SET Job Creation Initiative	Industry Sector(s):	Construction Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 140	U.S.: 140	Worldwide: 140
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	=	(High Earner Reduction)	=	Total ETP Funding
\$130,000		\$0		\$0		\$130,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$135,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp.	120	8-200	0	\$1,040	\$22.77
				Weighted Avg: 40			
2	Job Creation SET Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp.	5	8-200	0	\$1,400	*\$14.58
				Weighted Avg: 40			

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

Minimum Wage by County: Job Number 1 (SET/Priority Industry): \$22.77 per hour
 Job Number 2 (Job Creation): \$14.58 for Orange; and \$14.62 in Los Angeles Counties

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Customer Service/Dispatch		18
Service Technician/Installer		73
Frontline Lead/Supervisor		29
Job Number 2 (Job Creation)		
Service Technician/Installer		5

INTRODUCTION

Established in 1972, Aire-Rite Air Conditioning & Refrigeration, Inc. (Aire-Rite) provides commercial refrigeration services and installation. Headquartered in Huntington Beach, the Company has two additional sites in Los Angeles. Aire-Rite specializes in installation of heating, ventilations, air conditioning (HVAC), refrigeration/cooking equipment, proactive maintenance, and service for a diverse customer base that focuses in commercial real estate, data processing, restaurant and the food service industry. This is Aire-Rite’s first ETP Agreement.

PROJECT DETAILS

Aire-Rite recently invested in new instrumentation to improve energy conservation and indoor air quality. These instruments are highly complicated and require training on operations and troubleshooting. Trainees must also obtain updated HVAC Component Testing and Balancing Procedures. This includes how to prepare and review new test, balance reports with customers, reading and following HVAC System Diagrams.

Training will allow staff to consistently provide better quality services while remaining competitive in the industry. Training will address on-going technological changes, system upgrades, tools and equipment for faster service. Additionally, training will help to standardize processes companywide at its three Southern California locations. Training will help create a more flexible workforce where employees will be cross-trained in installation and service to increase productivity, reduce cost, increase retention and improve competitiveness.

Retrainee - Job Creation

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

Aire-Rite will hire five new employees (Job Number 2). Training will focus on new equipment and air systems procedures. 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.

Aire-Rite has experienced a sales growth of 40-45% over the last two years. In addition, the Company is expanding into new markets broadening its customer base. In order to keep up with business expansion, the organization will hire new Technicians and Customer Service staff.

Training Plan

Aire-Rite is focused on building a high performance workplace where employees are able to work in multiple jobs, solve problems, and identify and implement ideas for continuous improvement. The training plan is based on recent business growth, new and changing technology and an aging construction expert workforce. In an effort to address these challenges Aire-Rite must provide training to upgrade skills, address new technologies, improve efficiencies, reduce waste, remain competitive and keep up with customer/industry demands.

Business Skills: Training will be offered to all occupations and include Business Case Analysis and Development; Project, Time and Budget Management, Negotiation Skills, Sales Skills and Strategic Planning. Training will provide workers with skills necessary to manage work goals, priorities, and improve sales.

Commercial Skills: Training will be offered to all occupations and include Blueprint Reading, HVAC Skills, Leadership Energy Environmental Design, Equipment Maintenance, Quality Control Analysis, and various field operational procedures. Training will help workers improve skills needed in all phases of a project. Training will also be specific to the types of equipment and/or process to ensure trainees receive a broader understanding of the entire design, construction and installation processes.

Computer Skills: Training will be offered to all occupations and include various software systems such as ACAD, Adobe Acrobat, AutoCAD, Building Design Suite, Prolog, ProCore, Windows, Quick Pen, and SAMPro system. Trainees will ensure the ability to effectively utilize the system and improve operational efficiencies.

Continuous Improvement: Training will be offered to all occupations and include Goal Setting, Process Improvement, Communication Skills, Conflict Resolution, Quality Improvement, Team Building and Leadership Skills. Training will provide workers with skills to better understand and respond to project and workplace challenges.

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 modified statewide average hourly wage at the end of the retention period.

For trainees employed in a priority industry, the Panel may modify the SET wage up to 25% below the statewide average hourly wage to \$22.77. This wage modification is needed to train all occupations (Job Number 1) to provide opportunities for promotion, wage increase, and long-term job security.

Frontline Worker

The Lead/Supervisor outlined in this training proposal meet the Panel's definition of "frontline workers" because they spend more than 50% of their time performing frontline duties. As such, they qualify for SET funding.

Commitment to Training

Aire-Rite spends approximately \$100,000 annually on training in California. Training is job specific, and includes safety, interpersonal communications, management, business development and leadership training.

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

➤ Training Infrastructure

The Human Resources Manager at the Huntington Beach location will oversee administration. An onsite Office Administrator has been assigned to the existing Los Angeles locations to provide oversight and record collection. Training will be provided by in-house experts and vendors. Staff members at each location will also assist with administration.

Impact/Outcome

The demand for the Company's services are growing dramatically and due to an aging workforce, new employees will need to be hired and trained. ETP funding will assist Aire-Rite in building the additional staff capabilities and upgrading existing employee's skills necessary to meet or surpass planned growth goals.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

HOPNEST Inc. in Los Angeles assisted with development for a flat fee of \$6,800.

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

Workforce Technician Education Center of Los Angeles will provide Business, Computer, Commercial and Continuous Improvement Skills training for a fee of \$13,000. Other trainers will be identified for ETP record-keeping purposes, as they are retained.

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- + Business Case Analysis
- + Business Development
- + Business Partnering
- + Contract Administration
- + Interpersonal Communication
- + Project Management
- + Public Sector Finance Government and Accountability
- + Time Management
- + Service Costing and Financial Modeling
- + Work Procedures
- + Budget Management
- + Financial Management
- + Negotiation Skills
- + Sales Skills
- + Strategic Planning

COMMERCIAL SKILLS

- + Blueprint Reading
- + Construction Procedures
- + Energy Saving Procedures
- + Field Operational Procedures
- + Heating, Ventilation and Air Conditioning
- + Leadership in Energy and Environmental Design
- + Plumbing Procedures
- + Refrigeration Procedures
- + Process Piping Procedures
- + Site Management Procedures
- + Welding Procedures
- + Project Turnover Procedures
- + Operations Procedures
- + Operations Monitoring
- + Equipment Maintenance
- + Operation and Control Procedures
- + Quality Control Analysis
- + System Analysis
- + System Evaluation
- + Operation Analysis

COMPUTER SKILLS

- + ACAD
- + Adobe Acrobat
- + Autodesk Building Design Premium
- + AutoCAD Lt
- + AutoCAD MEP
- + Building Design Suite
- + Fabrication CADmep
- + Fabrication CAMduct

- ✦ Intermediate and advanced Microsoft Office
- ✦ NavisWorks – ACAD
- ✦ Primavera
- ✦ Prolog
- ✦ ProCore
- ✦ Timberline Management Module
- ✦ SMARTS system
- ✦ BlueBeam
- ✦ Timberline
- ✦ Windows 7, 8, and 10
- ✦ Quick Pen

CONTINUOUS IMPROVEMENT

- ✦ Goal Setting
- ✦ Meeting Management
- ✦ Planning Skills
- ✦ Process Improvement
- ✦ Quality Improvement
- ✦ Communication
- ✦ Conflict Management
- ✦ Conflict Resolution
- ✦ Decision Making
- ✦ Delegation Skills
- ✦ Engagement Skills
- ✦ Leadership Skills
- ✦ Logistics Skills
- ✦ Problem Solving Skills
- ✦ Team Building
- ✦ Teamwork

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



Training Proposal for:
Asian Business Association, San Diego
Agreement Number: ET19-0204

Panel Meeting of: August 24, 2018

ETP Regional Office: San Diego

Analyst: H. Bernard

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Entrepreneurial SET	Industry Sector(s):	Construction Engineering Financial Services Healthcare Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$20,800		\$1,440 8%		\$22,240

In-Kind Contribution:	50% of Total ETP Funding Required	\$50,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Entrepreneurial Priority Rate SET	Business Skills, Computer Skills, Mgmt. Skills	6	8-60	0	\$1,112	N/A
				Weighted Avg: 40			
2	Retrainee Entrepreneurial SET	Business Skills, Computer Skills, Mgmt. Skills	14	8-60	0	\$1,112	N/A
				Weighted Avg: 40			

Minimum Wage by County: Job Numbers 1 & 2 (SET/Entrepreneurial): No Wage Requirement
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Owner	N/A	20

INTRODUCTION

Founded in 1990, Asian Business Association, San Diego (ABA) creates opportunities for professional development and economic growth for San Diego's Asian and Pacific Islander business community. ABA facilitates growth and development of member businesses through ongoing education, communication and networking programs. ABA has almost 600 members across the San Diego region. This is ABA's first ETP Agreement.

According to the 2017 city of San Diego Economic Development Department Report, there were nearly 98,000 registered businesses in the city, 90% were small businesses with 13 or fewer employees. Further, some of the critical barriers to small business development is business management, access to capital and business development. ABA is seeking to remove some of those barriers and will be creating the Excellence in Small Business Management (EBSM) training program to bridge skills gaps that entrepreneurs have in growing their business.

PROJECT DETAILS

In June 2017, ABA launched its Business Development Resource Center (BDRC) to help small and disadvantaged businesses and entrepreneurs build a foundation for business success. The BDRC provides business development services and works with partners in the banking community to assist small businesses access capital through loans. This is accomplished by offering custom workshops, education, technical assistance, networking programs and a mentoring program. The BDRC currently provides training to its small business members on topics such as Accounting Practices, Business Plan Development, E-Business, Financial Analysis, Human Resources and Sales and Business Development. The EBSM will recruit trainee participation from all sectors of the San Diego regional economy and will be included as a part of the BDRC.

To design its entrepreneurial curriculum and determine employer need under the project, ABA interviewed its member businesses, community partners, economic development experts and local government officials. These included the City and County of San Diego, the San Diego Diverse Supplier Council members, San Diego State University, San Diego Business Improvement Council and the Great San Diego Chamber of Commerce. As a result, ABA created the EBSM training program which has 40 hours of classroom based training. The program includes business skills, but will focus primarily on management and leadership skills. It will consist of five training modules focusing on providing information and practical applications that entrepreneurs can apply to everyday management and overall growth. ABA will provide surveys to all trainees after training is completed to gauge the effectiveness and make any changes to the training plan that might be necessary to ensure training is relevant and useful for the entrepreneurs.

Training Plan

Training will be provided via classroom/laboratory in the following:

Business Skills: Fundamentals of Business Finance, Understanding Business Contracts and Marketing Products & Services

Computer Skills: Digital Marketing

Management Skills: Introduction to Small Business Management, Leadership Skills, Business Operations Management and Developing Market Strategy and Planning

Marketing and Support Costs

ABA will market the ETP project through its member small businesses as well as on the ABA website, social media, through monthly networking luncheons, collaborative meetings and events. ABA will also market the project to other organizations such as San Diego and Imperial Small Business Development Center, the San Diego Employers Association and through print and digital media such as the San Diego Business Journal to assist with recruitment of entrepreneurs. ABA is requesting 8% support costs to assist with recruitment and outreach. Staff recommends these costs.

Special Employment Training

Under SET, the participating employer is not required to demonstrate out-of-state competition. Under SET the Entrepreneurial program, the participating Owners are not subject to a post-retention wage requirement.

Trainer Qualifications

Vendors are subject matter experts. These vendors have experience training small businesses in the curriculum topics. Training will be provided by Human Systems Consulting, Cook + Schmid, and other trainers to be determined. Reimbursement shall not be earned for training hours delivered by any single training vendor in excess of 50% of total training.

Commitment to Training

Many of the participating employers lack the resources to develop comprehensive training plans or provide structured training. Current training topics provided by most participating employers include new hire orientation, sexual harassment prevention and best practices. ETP funds will not displace the existing financial commitment to training.

Training Infrastructure

ABA's President and CEO will work in conjunction with the Membership & Operations Manager to oversee administration and training. ABA staff will act as the liaison between the training vendors and the member businesses.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Human Systems Consulting in San Diego assisted with development for a flat fee of \$2,500.

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

Human Systems Consulting of San Diego will provide Business Skills for approximately \$10,000.

Cook + Schmid of San Diego will provide Computer Skills for a fee to be determined.

Other vendors will be identified as they are retained.

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 60

Trainees may receive any of the following:

BUSINESS SKILLS

- Fundamentals of Business Finance: Financial Control
- Understanding Business Contracts, Legal Issues & Regulations
- Marketing Products & Services: Developing Selling Skills

COMPUTER SKILLS

- Digital Marketing: Social Media Skills

MANAGEMENT SKILLS

- Introduction to Small Business Management
- Leadership Skills for Small Business Owners
- Planning a Successful Small Business
- Business Operations Management: Managing Business Performance Capability
- Developing Market Strategy and Planning: Creating a Brand Identity

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

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Asian Business Association, San Diego

CCG No.: ET19-0204

Reference No: 18-0058

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Aqual Corp

Address: 7951 North Ave.

City, State, Zip: Lemon Grove, CA 91945

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 6

Total # of full-time company employees in California: 6

Company: BenefitPro Insurance

Address: 2655 Camino Del Rio N, #425

City, State, Zip: San Diego, CA 92108

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 9

Total # of full-time company employees in California: 9

Company: BioPhysics Chiropractic

Address: 5280 Oberlin Dr., Ste. 204

City, State, Zip: San Diego, CA 92121

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Bread Deluxe Bakery

Address: 1420 E Plaza Blvd., SD-1

City, State, Zip: National City, CA 91950

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 8

Total # of full-time company employees in California: 8

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Asian Business Association, San Diego

CCG No.: ET19-0204

Reference No: 18-0058

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Company: Cats Excavating Inc.

Address: 1944 54th St.

City, State, Zip: San Diego, CA 92105

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Encore Partners LLP

Address: 10620 Treena Street, Suite 140

City, State, Zip: San Diego, CA 92131

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 9

Total # of full-time company employees in California: 9

Company: Focuscom Inc.

Address: 101 W Broadway, Suite 1450

City, State, Zip: San Diego, CA 92101

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 6

Total # of full-time company employees in California: 6

Company: Infill Development Company

Address: 771 Jamacha Road #516

City, State, Zip: El Cajon, CA 92019

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 3

Total # of full-time company employees in California: 3

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Asian Business Association, San Diego

CCG No.: ET19-0204

Reference No: 18-0058

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Company: Ito Girard & Associates

Address: 5003 Imperial Ave., #14-B

City, State, Zip: San Diego, CA 92113

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Jade Coast Software Inc.

Address: 12133 Sage View Road

City, State, Zip: Poway, CA 92064

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 1

Total # of full-time company employees in California: 1

Company: Liberty Capital Group

Address: 1011 Camino Del Rios

City, State, Zip: San Diego, CA 92108

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 2

Total # of full-time company employees in California: 2

Company: RNN International. Inc

Address: 1430 E. Plaza Blvd., #E10

City, State, Zip: National City, CA 91950

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 6

Total # of full-time company employees in California: 6

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Asian Business Association, San Diego

CCG No.: ET19-0204

Reference No: 18-0058

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Company: S. Lew & Associates

Address: 3709 Convoy St., #300

City, State, Zip: San Diego, CA 92111

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 7

Total # of full-time company employees in California: 7

Company: SuiteCare Pharmacy

Address: 2441 E. Plaza Blvd.

City, State, Zip: National City, CA 91950

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: The Coopersmith Law Firm

Address: 555 W. Beech St., Suite 230

City, State, Zip: San Diego, CA 92101

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 4

Total # of full-time company employees in California: 4

Company: Urban Dental

Address: 1111 6th Ave., Suite 510

City, State, Zip: San Diego, CA 92101

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 6

Total # of full-time company employees in California: 6

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Asian Business Association, San Diego

CCG No.: ET19-0204

Reference No: 18-0058

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Company: Villa Manila

Address: 500 E. Street

City, State, Zip: National City, CA 91950

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 3

Total # of full-time company employees in California: 3



RETRAINEE - JOB CREATION

Training Proposal for:

Cablecom, LLC

Agreement Number: ET19-0221

Panel Meeting of: August 24, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

PROJECT PROFILE

Contract Attributes:	SET Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, Solano, Contra Costa, San Francisco, Santa Clara, Sonoma	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 820	U.S.: 1,130	Worldwide: 1,130
<u>Turnover Rate:</u>	7%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$163,800		\$0	\$0		\$163,800

In-Kind Contribution:	100% of Total ETP Funding Required	\$400,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	Commercial Skills, Continuous Impr, PL- Comm Skills	54	8-200	0	\$1,300	\$22.77
				Weighted Avg: 50			
2	SET Priority Retrainee Job Creation	Commercial Skills, Continuous Impr, PL- Comm Skills	60	8-200	0	\$1,560	\$13.66
				Weighted Avg: 60			

Minimum Wage by County: Job Number 1:\$22.77 SET Statewide; Job Number 2: \$13.66 Solano and Sonoma County, \$15.18 for Alameda, Contra Costa, San Francisco, and Santa Clara.
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 \$0.72 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Cable Technician		54
Job Number 2		
Cable Technician		60

INTRODUCTION

Cablecom, LLC (Cablecom) (www.cablecomllc.us) was established in 2002 and has six locations in Northern California that will participate in ETP-funded training: Fremont, Fairfield, Martinez, South San Francisco, Santa Clara, and Santa Rosa. Cablecom provides fiber optic cable installation, technical assistance and related construction project management services. Clients are from a variety of industries including utility, wireless communication, and power companies such as Verizon Communications and Comcast Corporation. This is Cablecom's first ETP agreement.

PROJECT DETAILS

Cablecom is experiencing rapid growth as customers transition from coaxial cable to fiber optic cable due to speed and quality considerations. Additionally, business is expected to grow by an estimated 10% through 2020. In order to meet customer demand, the Company needs to hire and train Technicians.

This proposal also includes intensive training to upgrade staff's skills in site construction necessary due to the high number of wireless products deploying market-wide and recently purchased equipment (jack hammers, concrete saws digging and boring machines) to keep pace

with rapid industry changes. Training will support Cablecom's strategic business goals, improve safety and efficiency, fill skills gaps, and meet new customer contract demands.

Retrainee - Job Creation

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

Cablecom is expanding business capacity. The Company will hire 60 new Technicians (Job Number 2). The Company's expansion is necessary to meet customer demands resulting from developments in fiber optic cable technology spanning many communications based markets. The Company has invested in new equipment to help keep pace with customer demand. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Cablecom's will provide Classroom/Laboratory and Productive Lab training in the following:

Commercial Skills: Training will be offered to Cable Technicians. Upgraded construction skills specific to communications projects require highly technical and customized skillsets. Training in topics such as Aerial Splicing Specifications, Coax/ Fiber Overview, Aerial and Underground Construction Practices is critical to remain competitive.

Continuous Improvement: Cablecom is rolling out Standardized Best Practices to Cable Technicians in an effort to improve efficiency and ensure safety. Training will also address skill gaps to increase productivity. Topics include Excavation and Power Tool Safety

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.

All trainees will receive up to 40 hours of PL training in Commercial Skills. An experienced trainer will specify scope of work, explain processes and needed equipment, and verify trainee understanding of standards and specifications. Trainers will observe, provide feedback, assist with re-work, and ensure employees reach competency. The Company is requesting a 1:3 trainer-to-trainee ratio because processes are commonly performed in teams of three.

Commitment to Training

Cablecom's annual training budget is \$518,400 for its 14 California facilities (estimated \$37,028 each site). Cablecom delivers about 240 hours of paid training on procedures and new hire orientations per year to employees. Thus, a robust training infrastructure exists.

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

Cablecom has two dedicated internal Administrators (H.R. Director and Loss Control Manager) and five in-house trainers. All training will be provided at the Company's Martinez facility. The Company has also retained an experienced subcontractor, RSM, to assist with

administration. Training will be delivered by in-house subject-matter experts. A detailed training schedule is in place, and training will commence upon Panel Approval.

RECOMMENDATION

Staff recommends approval of this proposal along with the wage modifications.

DEVELOPMENT SERVICES

Cablecom retained RSM US LLP in New York to assist with development of this proposal for a flat fee of \$5,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Forklift Training
- Flagger Training
- Crystalline
- Silica Rule
- Pole Climbing
- Aerial and Underground Construction Practices
- Working with Ladders
- Design and Architecture and Map Reading
- Aerial Splicing Specifications
- Underground Splicing Specifications
- Multi Dwelling Unit Splicing Specifications
- Grounding and Bonding

CONTINUOUS IMPROVEMENT

- Basic First Aid Part II
- Operating Trucks
- Proper Lifting
- Work Area Assessment
- Go 95 & 195 Rules
- Heat Illness
- Ladder Handling
- Electrical Gloves and Tools
- Personal Protective Equipment Training
- Pre-Trip Procedures
- Safety in Insulated Buckets
- Dangerous Materials Handling
- Slips, Trips, and Falls
- Cable Safety Series Orientation
- Traffic Control
- Trenching and Shoring Procedures
- Working near Overhead Power Lines
- Power Tool Operation

PL Hours

0-40

COMMERCIAL SKILLS (limited ratio 1:3)

- Aerial Splicing Specifications
- Aerial Construction Practices
- Pole Climbing – gas or climbing the poles and training for step
- Working with Ladders
- Grounding and Bonding
- Underground Splicing Specifications
- Underground Construction Practices

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

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



RETRAINEE - JOB CREATION
Training Proposal for:
California Family Foods, LLC
Agreement Number: ET19-0199

Panel Meeting of: August 24, 2018

ETP Regional Office: Sacramento

Analyst: K. Jones

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative SB <100 HUA	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Colusa	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 88	U.S.: 88	Worldwide: 88
Turnover Rate:	4%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$99,450		\$0	\$0		\$99,450

In-Kind Contribution:	100% of Total ETP Funding Required	\$148,500
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate HUA	Business Skills, Computer Skills, Mfg. Skills	80	8-60	0	\$1,170	*\$12.53
				Weighted Avg: 45			
2	Retainee Job Creation SB<100 Priority Rate HUA	Business Skills, Computer Skills, Mfg. Skills	5	8-60	0	\$1,170	*\$11.00
				Weighted Avg: 45			

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

Minimum Wage by County: Job Number 1(HUA): \$12.53 per hour for Colusa County

Job Number 2(Job Creation/HUA): \$11.00 for Colusa 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 the employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		9
Production Staff		49
Maintenance Staff		4
Managers		3
Supervisors		15
Job Number 2		
Production Staff		4
Supervisor		1

INTRODUCTION

Founded in 1982 and located in Arbutle, California Family Foods, LLC (CFF) (<http://californiafamilyfoods.com/>) specializes in the milling and processing of medium and short grain rice. CFF exclusively uses rice growers from Northern California and was the first California rice mill to obtain certification from Global Standards for Food Safety (GFSI). CFF's core customer

base includes grocery stores and restaurants throughout the United States with approximately 20% of its rice products being distributed worldwide. This will be CFF's first ETP Agreement. Training will be conducted at CFF's single location in Arbuckle.

PROJECT DETAILS

CFF has seen a 4% increase in product demand over the past 3 years. To keep up with this demand, CFF recently purchased several new pieces of commercial packaging and milling equipment. This new equipment will allow CFF to increase production and efficiencies. Training is needed in Milling Equipment Operation and Good Manufacturing Practices to ensure trainees have the skills to effectively operate the equipment.

CFF has also updated its internal processes and procedures to increase production efficiencies and reduce waste. This will standardize internal processes and create consistency in production. Courses include Processing Techniques and Inventory Control.

CFF will provide training on Project Management and Communications Skills to ensure staff can manage new contracts and attract additional growers.

Retrainee - Job Creation

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

CFF recently contracted with two new Northern California rice growers to increase the amount of unprocessed short grain rice. These rice growers will increase CFF's milled rice production by 5% over the next two years. To ensure CFF can meet milling demands, the Company purchased new equipment and will hire four Production Staff and one Supervisor (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Training will be delivered via Class/lab training in the following:

Business Skills: Training will be provided to Administrative Staff, Managers and Supervisors to ensure administrative efficiency and client satisfaction. Training topics include Project Management, Customer Service, Project Planning, Leadership and Financial Analysis & Reporting.

Manufacturing Skills: Training will be provided to Managers, Supervisors, Production and Maintenance Staff. Training will focus on new production equipment and techniques to ensure efficient production. Training topics include Equipment Maintenance & Repair, Processing Techniques, Packaging Equipment Operation, and Food Safety.

Computer Skills: Training will be offered to all staff in production software. Training topics include Manufacturing Resource Planning Software, Order Fulfillment Software, Scheduling Software and Onepoint HRIS Software.

High Unemployment Area

All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%.

➤ Wage Modification

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. CFF requests a wage modification from \$16.70 to \$12.53 per hour for Job Number 1; and from \$13.66 to \$11.00 for Job Number 2.

Commitment to Training

CFF spends in excess of \$70,000 per year on training for new hire orientation, safety training, California labor laws and regulations, basic computer skills, violence in the workplace prevention and sexual harassment prevention.

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

➤ Training Infrastructure

The Company is ready to begin training upon approval. The Project Manager will oversee all administration. CFF has designated four Managers to oversee roster collection and training project performance. CFF has one designated trainer to coordinate and schedule training for all staff. The Company has retained Propel Consulting Group to assist with ETP administration. Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Propel Consulting Group of El Dorado Hills assisted with development for a flat fee of \$6,961.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

New Horizons Learning Group of Sacramento will provide select Computer Skills training for a fee of \$2,000.00 per trainee. Other trainers will be identified for ETP record-keeping purposes as they are retained.

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

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Communication Skills
- Customer Service
- Financial Analysis & Reporting
- Inventory Control
- Leadership
- Problem Solving & Decision Making
- Project Management
- Project Planning

COMPUTER SKILLS

- Database & Report Writers Software
- Enterprise Resource Planning Applications
- Manufacturing Resource Planning Software
- Microsoft Office (Intermediate/Advanced)
- Onepoint HRIS Software
- Order Fulfillment Software
- Sage 1000 Software
- Scheduling Software

MANUFACTURING SKILLS

- Equipment Maintenance & Repair
- Food Safety
- Forklift Training
- Good Manufacturing Practices
- Milling Equipment Operation
- Packaging Equipment Operation
- Problem Solving & Decision Making
- Processing Techniques
- Production Safety
- Programming Logic Controller
- Quality Analysis & Assurance

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



**TRAINING PROPOSAL FOR
CHILTON AND LESTE MANAGEMENT, INC.
18-0645**

Panel Meeting Date: 08/24/2018
Regional Office: North Hollywood Regional Office
Analyst Name: Monique Webb
Type of Proposal: Single Employer
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$135,200.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$135,200.00	N/A	\$0.00	\$135,200.00

APPLICANT PROFILE

Company Summary	Chilton and Leste Management, Inc. (Chilton & Leste) is the parent company of several affiliate health care providers united through common ownership.
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Industry Sector(s)	Healthcare
Priority Industry	Yes
No. Employees (Applicant)	State: 110 US: 110 World Wide: 110
Turnover Rate (Applicant)	4%
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will increase nursing skills and improve the quality of healthcare provided to patients.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	65	\$26.00	80	\$2,080	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1994 and headquartered in Moorpark, Chilton & Leste (www.accesstlc.com) is the parent company to affiliate health care providers located in California. The Company specializes in hospice, caregiving, transport and home healthcare services. Affiliated companies in this project include: Tender Loving Care Home Hospice; Moorpark Health Care Center; Access TLC Caregivers; and Vital Plus Home Health Care dba Access TLC Home Health Care. Customers are patients who require hospice, home health and skilled nursing assistance.

Chilton and Leste will hold the contract to train its affiliates, but it will not participate in training. All training provided under this Agreement will be delivered to employees of the following affiliated companies: Tender Loving Care Home Hospice, Vital Plus Home Health Care, and Moorpark Health Care Center. All locations are in Moorpark. Vital Plus and Tender Loving Care are located in the same corporate office. This will be the Company's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>New healthcare regulations for hospice and home health drive the ongoing need to provide training to medical staff. Training will ensure compliance with new healthcare regulations, and enable trainee to provide quality care and services to its patients. Training will include Medical, Computer and Continuous Improvement courses to increase employee nursing skills and improve patient care.</p> <p>Newly hired Registered Nurses and Licensed Vocational Nurses will receive hands-on training with patients to ensure workers are providing patient care in line with healthcare practices and methodologies. Training will also include communication training to ensure effective interaction with patients. Training will also include Business Skills training on new regulation and updates to the Patient Bill of Rights and the Patient Self-Determination Act.</p> <p>Computer Skills training will be provided to all employees on electronic medical record keeping software programs. In addition, staff now uses Microsoft IPADS and surface tablets to document patient care. As a result, training will be provided to ensure electronic products are used accurately.</p>
Training Infrastructure and Administrative Plan	<p>The Administrator and Director of Administrative Services will oversee this training project. Two Human Resource staff members will schedule training conducted at all locations, enroll trainees, and perform all data entry for each location. Training will be provided by in-house experts.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

PROPOSED TRAINING PROJECT DETAILS

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Trainees will receive Business, Medical, Computer, and Continuous Improvement Skills training delivered via Class/Lab (Attachment 2).	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Communication Skills
	Maintaining Professional Boundaries
	Patient Bill of Rights/Responsibilities
	Patient Self-Determinations Act
	Patient w/Pain Bill of Rights/Responsibilities
	Professional Responsibility & Development
	Unusual Occurrences Definition & Reporting Mechanism
Computer Skills (Standard)	Consolo (Computer Software)
	Devero (Computer Software)
	Electronic Record Keeping System
	Microsoft IPAD/Tablet Training
Continuous Improvement Skills	Child & Elder/Dependent Abuse
	Community Resources
	Grief & Bereavement-Basic
	Safety: Home & Care Facility, General Care
Medical Skills (didactic)	Basic Patient Care
	Body Mechanics
	Case Management
	Compliance and Quality Improvement
	Death and the Dying Patient
	End Stage Disease
	Grief and Bereavement- Basic
	Handling Medications and Equipment
	Hospice Care Planning and Integration
	Hospice in Alternate Setting
	Hospice Medicare Benefit
	Hospice Philosophy, History, and Background
	Human Behavior/Family Dynamics
	Incident Reporting
	New Nurses Orientation Training
	Nutrition and Hydration at the End of Life
	Pain Management- Basic
	Principles of Infection Control
	Stress Management
	Suicide
Symptom Management of other than Pain	



RETRAINEE - JOB CREATION

Training Proposal for:

Gagne Brothers Enterprises, Inc. dba Ben Franklin Plumbing

Agreement Number: ET19-0217

Panel Meeting of: August 24, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

PROJECT PROFILE

Contract Attributes:	SET Priority Rate Job Creation Initiative Veterans	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Alameda, Marin, Contra Costa, Santa Clara	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 106	U.S.: 106	Worldwide: 106
<u>Turnover Rate:</u>	15%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Program Costs</td></tr> <tr><td style="text-align: center;">\$150,098</td></tr> </table>	Program Costs	\$150,098	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(Substantial Contribution)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(Substantial Contribution)	\$0	-	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">(High Earner Reduction)</td></tr> <tr><td style="text-align: center;">\$0</td></tr> </table>	(High Earner Reduction)	\$0	=	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="text-align: center;">Total ETP Funding</td></tr> <tr><td style="text-align: center;">\$150,098</td></tr> </table>	Total ETP Funding	\$150,098
Program Costs														
\$150,098														
(Substantial Contribution)														
\$0														
(High Earner Reduction)														
\$0														
Total ETP Funding														
\$150,098														

In-Kind Contribution:	100% of Total ETP Funding Required	\$150,098
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate	OSHA 10, PL-Commercial Skills, Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials	62	8-200	0	\$1,924	\$22.77
				Weighted Avg: 74			
2	Retrainee SET Job Creation Priority Rate	OSHA 10, PL-Commercial Skills, Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials	12	8-200	0	\$2,080	*\$15.18
				Weighted Avg: 80			
3	Retrainee SET Priority Rate Veterans Job Creation	OSHA 10, PL-Commercial Skills, Business Skills, Commercial Skills, Computer Skills, Continuous Improvement, Hazardous Materials	3	8-200	0	\$1,950	*\$15.18
				Weighted Avg: 75			

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

Minimum Wage by County:

Job Number 1 the SET Statewide post-retention minimum wage requirement is \$22.77. For Job Numbers 2 and 3, ETP's minimum wage requirement is \$15.18 for Contra Costa, Alameda, Marin and Santa Clara Counties.

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

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

Up to \$2.42 per hour may be used to meet ETP's Post-Retention Minimum Wage requirement in Job number 1. For Job Number 2, the company paid portion of Medical, Dental, and Vision benefits up to \$2.43 may be used. Health benefits are not needed for Job Number 3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 (SET Priority & 3 Veterans Job Creation)		
Administrative Staff		4
Sales Staff		5
Logistics Staff		4
Delivery Staff		4
Team Leads		7
Technicians		42 (3 JC VETS)
Job Number 2 (Job Creation)		
Technicians		8
Administrative Staff		1
Sales Staff		1
Logistics Staff		1
Delivery Staff		1
	Total	78

INTRODUCTION

Gagne Brothers Enterprises, Inc. (<http://www.benfranklinplumbing.com>) dba Ben Franklin Plumbing (Gagne), was founded 1996 and is headquartered in Novato, California. Its subsidiary, Gagne Mulford Enterprises, will also participate in training. Gagne provides residential plumbing services including installation of new equipment, and diagnosis and repair of existing equipment. Training will be provided at Novato, San Jose, and Concord sites.

Veterans Program

Gagne will hire three Veterans to be trained (Job Number 3) who have served on active full-time duty in the Armed Forces. The Company actively works with organizations such as Troops to trades, Women Warriors in the Trades, and job placement firms that seek to match veterans with its employment opportunities. The Company also participates in veteran-focused job fairs, online recruiting events and works directly with local military installations to recruit employees.

PROJECT DETAILS

Title 24, California Code of Regulation necessitates training to upgrade skills throughout construction trades in order to meet rigorous efficiency standards by 2020. Those standards have led to the development and implementation of emerging technologies for use on plumbing projects such as On-Demand Hot Water systems, which aim to reduce home energy use.

The Company has made significant recent investments (estimated \$260K) in equipment such as Trenchless and Hot Water Systems which require training. Workers must be trained on specialized installation equipment for customers. When new products such as water efficiency fixtures enter the market, training is provided on those products. The Company has built a training lab facility that is used routinely for updates on new equipment and to continuously upgrade the skills of Technicians.

The demand for Gagne's services is growing, resulting in new customers and a planned new facility opening in Oakland.

Through training, Gagne aims to:

- Support company growth by hiring and training new workers for high skilled positions that typically lead to well-paid positions within the Company.
- Upgrade worker skills in hot water systems (electric, gas) plumbing fixtures, piping, and welding, and the use of brazing tools.
- Adapt to revised and periodically changing internal/external industry standards and technologies.

Commitment to Training

Gagne's annual training budget is \$525K for its three California facilities. Gagne's existing structured training covers new-hire basic computer skills and basic core technical training, and on-the-job training, all of which will continue to be provided at the Company's expense.

The Company has a robust training program that provides an estimated 420 training hours per employee. 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

Gagne has four dedicated internal administrators. The company's HR Manager is the primary contact. One team lead at each location will assist with administering the training project. Gagne has nine in-house trainers (three per site). The Company also has an Administrative Subcontractor, Synergy Management Consultants that will be assisting Gagne to ensure training is documented and tracked properly to meet ETP's requirements. Training is scheduled to be delivered in-house with some training such as OSHA provided by California based vendors.

Green/Clean Operations

Gagne is involved in both Green and Clean technology on the service and installation of energy efficient equipment Trenchless and Hot Water Systems. California Code of Regulations Title 24 Chapters 4-9 requires substantial increases in building efficiency. Green technology within plumbing addresses changes that respond to drought conditions in California to improve water use, potable water efficiency with water conservation being a key goal. Another area of efficiency Gagne is directly servicing is related to demand water supply heating, which reduces fuel/ electric usage and therefore reduces carbon based emissions and toxic waste.

Impact/Outcome

Training will meet the following objectives:

- Upgrade vocational skills of frontline workers to remain competitive in a rapidly expanding

construction industry, specifically addressing Title 24 changes as those changes pertain to plumbing.

- Train employees on Lean processes and new technology to speed productivity and reduce assessed skill gaps.
- Increase OSHA certified employees (24 new OSHA certifications).
- Hire and train workers on equipment and standards to operate the new facility.
-

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.

Thirty-eight Technicians will receive up to 60 hours of PL training in Commercial Skills. Newly-hired staff and cross-trained staff will receive the most hours. PL training will utilize an experienced trainer to specify the scope of work, explain the process and needed equipment, and verify that the trainee understands standards and specifications. The trainer will observe the employee(s) 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 reaches competency.

PL trainer-to-trainee ratio will not exceed 1:3. This ratio is necessary as it is common for tasks to be performed in teams at worksites to safely use equipment. The majority of PL training will be delivered at a 1:1 ratio. Technicians training is highly technical and many updates occur per year due to changing original manufacturers specifications on a variety repair procedures for various automobiles.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly hired employees will be reimbursed at \$26 per hour and trainees will be subject to a lower post-retention wage. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

Gagne will hire 15 new employees, including three veterans, across occupations at its three facilities to manage company growth.

Gagne is experiencing a 25% increase in client projects and an estimated 28% increase in revenues. Thus, the Company plans to open a new location in Oakland in 2019 to support Bay Area construction projects. Hiring and training is paramount to prevent interruptions in operations and project timelines.

Gagne plans to train new employees on new equipment (estimated \$260K invested) such as plumbing fixtures, welding tools, and gas and/or electric hot water heaters of various types.

Training Plan

Gagne's training will be delivered via Classroom/Laboratory and Productive Lab in the following:

Business Skills: Training will be delivered to staff across all occupations to improve skills due to changes resulting from new products and service roll-outs related to Title 24 and updates in company procedures that impact customer service such as estimating job costs and informing consumers of their product options that meet compliance with new rules. This training supplements introductory training provided by Gagne to all employees. Topics such as Billing, Customer Need Assessment, Sales Procedures, and Communication Skills are proposed.

Commercial Skills: Training will be delivered to Technicians and Sales Staff on topics such as Compression Fittings, Valves, and Back Flow Systems, to remain competitive and meet Title 24 energy efficiency guidelines. Changes caused by Title 24 provisions requires sales staff be familiar with new code requirements and new equipment in order to advise customers.

Computer Skills: Training will be delivered to all occupation in tablet applications, which are a new technology in use at Gagne. Tablets are used in sales, inventory, billing, estimating to meet improved on time service delivery goals. To facilitate logistics and managerial functions, Administrative Staff and Sales Staff need training on intermediate level MS Office software. Topic Regulatory Code Research Technique is proposed for Technicians to assist Gagne with staying current on applicable building codes.

Continuous Improvement: Training will be delivered to all occupations to meet the Company's efficiency and quality control goals. Those goals include improving on-time service times by 10% and decreasing re-work by 15%. The Company's five year growth plan includes an emphasis on leadership to bolster communication skills. Topics such as Lean, Leadership, and Team building are proposed.

Certified Safety Training

OSHA 10

Team leads, Technicians, Logistics and Delivery Staff will be offered 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. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Hazardous Materials (HAZMAT)

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

PL-Commercial Skills: Training will be offered to Technicians. Gagne represents Technicians need supplemental hands-on training beyond what is offered at convention trade schools or Apprenticeship training programs. The customized services offered by Gagne has led the Company to develop an extensive training program with in-house practice equipment used in classroom training settings. The PL portion of the training supports the classroom training, but the PL training is conducted in the field and helps the technicians learn to apply what they learned in class on real jobs. Some tasks are related to customer engagement, estimating, and logistics in the field. However, the vast majority of the topics are related to tasks that include powered water tanks, fixtures, and a wide range of installation, diagnostic, and repair skills needed to be a successful technician. Proposed topics; Cast Iron Pipe and Fitting, Fixtures and Faucets including install, and Drains, will be offered.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Gagne retained Synergy Management Consultants in Grass Valley to assist with development of this proposal for a flat fee of \$15,980.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

Synergy Management Consultants of Grass Valley has been retained to provide Continuous Improvement and Business Skills training, \$2,500.

Turner Safety of Dublin has been retained to provide OSHA training, \$2,500.

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

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- ✚ Communications
 - Persuasion Strategies
 - Intra-company Communication
 - Negotiation Skills
 - Presentation skills in the field
 - Active listening skills
 - Conflict Resolution
- ✚ Customer needs assessment
- ✚ Understanding and managing expectations
- ✚ Billing
- ✚ Sales Procedures

COMMERCIAL SKILLS

- ✚ Plumbing Safety
- ✚ Plumbing
- ✚ Basic tools
- ✚ Fundamentals of Water flow and Plumbing systems
- ✚ Maintenance of fixtures drains and water heaters
- ✚ Specialized tools
- ✚ 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 recirculation systems
- ✚ Water supply treatment systems
- ✚ Plumbing for mobile homes
- ✚ Diagnostics
- ✚ Septic systems maintenance
- ✚ Video Inspection
- ✚ Trenchless systems and tooling
- ✚ Plumbing Code

COMPUTER SKILLS

- ✚ Successware (proprietary management software) skills
- ✚ Regulatory Code research techniques
- ✚ Make technology your asset
- ✚ Tablet applications for field sales/ invoicing

- ✚ Intermediate MS Office

CONTINUOUS IMPROVEMENT

- ✚ Leadership skills
- ✚ Team Building
- ✚ Root cause Analysis
- ✚ Quality control/systems
- ✚ Logistics efficiency
- ✚ Kaizen Event strategy and implementation.
- ✚ Lean Production

HAZARDOUS MATERIALS

- ✚ Waste Water Handling
- ✚ Excavation safety
- ✚ Confined space

OSHA 10

- ✚ OSHA 10

Productive Lab Hours

0-60 Trainees may receive any of the following:

PRODUCTIVE LAB COMMERCIAL SKILLS (Ratio 1:3)

- ✚ Pipes and fittings (plastic) including install
- ✚ Copper Pipe and fittings
- ✚ Cast Iron Pipe and fittings
- ✚ Corrugated Stainless Steel Tubing
- ✚ 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
- ✚ Locating Buried water and sewer lines
- ✚ Venting pipe and fitting
- ✚ Water pressure booster and recirculation systems
- ✚ Water supply treatment systems
- ✚ Plumbing for mobile homes
- ✚ Video Inspection
- ✚ Trenchless replacements
- ✚ Plumbing Maintenance tasks

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:

Gilmore Heating & Air Conditioning, Inc.

Agreement Number: ET19-0203

Panel Meeting of: August 24, 2018

ETP Regional Office: Sacramento

Analyst: D. Jordan

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	El Dorado	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 110	U.S.:110	Worldwide: 110
Turnover Rate:	2%		
Managers/Supervisors: (% of total trainees)	14%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$199,914		\$0	\$0		\$199,914

In-Kind Contribution:	100% of Total ETP Funding Required	\$215,040
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Commercial Skills, Computer Skills, HazMat, OSHA 10/30	104	8-200	0-100	\$1,326	\$16.70
				Weighted Avg: 51			
2	Retrainee Job Creation Initiative Priority Rate	Business Skills, Commercial Skills, Computer Skills, HazMat, OSHA 10/30	45	8-200	0-100	\$1,378	*\$13.66
				Weighted Avg: 53			

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

Minimum Wage by County: Job Number 1 (Retrainee): \$16.70 per hour in El Dorado County; Job Number 2 (Job Creation): \$13.66 per hour in El Dorado County.
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 Up to \$2.50 per hour may be used to meet the Post-Retention Wage in Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		16
HVAC Installers		51
HVAC Service Technician		22
Plumbers		8
Solar Installers		5
Window Installers		2
Job Number 2		
Administrative Staff		4
HVAC Installers		20
HVAC Service Technician		8
Plumbers		7
Solar Installers		4
Window Installers		2

INTRODUCTION

Founded in 1979 and headquartered in Placerville, Gilmore Heating & Air Conditioning, Inc. (Gilmore) (www.gilmoreair.com) provides home energy efficiency services, including heating, ventilation, air conditioning installation, construction and repair, solar installation, home performance audits, electrical services, plumbing services, and window and door replacements. Training will take place at Gilmore's locations in Placerville and Cameron Park. This will be Gilmore's first ETP Agreement.

PROJECT DETAIL

Gilmore has seen an increase in revenue and customer base in the last five years. And, to continue growth, the Company has begun offering solar and plumbing services. These new services are part of a long list of home energy efficiency services the Company provides; however, many of Gilmore's employees do not have the complete skillset necessary to provide the new services. Thus, training in solar and plumbing skills including products information and installation techniques is necessary.

To remain competitive, Gilmore must improve employee skills. The Company recently invested in new software including Service Titan Customer Relationship Management Software, and iPad/Mobile Project Management. Training will provide employees skills to navigate the systems and proficiently perform their job duties. The Company will also train staff on Building Regulations, Home Performance Techniques, Sales Presentations, Customer Service and Intermediate and Advanced Microsoft Office. Training will allow staff the opportunity for future growth within the company and allow Gilmore to stay competitive.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate.

Gilmore is expanding due to the purchase of a new facility. Gilmore recently purchased a building in Cameron Park, double the size from the current location in Placerville. Gilmore will hire 45 new employees (Job Number 2). The Company will hire Administrative Staff, HVAC Installers, HVAC Service Technicians, Plumbers, Solar Installers and Window Installers. Hiring new staff will enable the Company to stay competitive and meet customer expectations. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Training will be delivered via Classroom/Laboratory and Computer-Based Training methods in the following:

Business Skills: Training will be offered to all occupations. Training will develop communication skills and improve accounting knowledge. Training topics will include Project Management, Written Communications, Product Knowledge, Financial Analysis and Accounting Techniques.

Computer Skills: Training will be offered to all occupations. Training will focus on newly purchased software. The courses include Service Titan, Service Titan Mobile, HVAC Learning Solutions, and Automated Phone Systems.

Commercial Skills: Training will be offered to all occupations except Administrative Staff. Staff will receive training on HVAC Installation and Maintenance, Water Heater Installation, Plumbing Techniques and Blue Print Interpretation.

Hazardous Materials: Training will be offered to all occupations except Administrative Staff. Training will allow staff to operate in an appropriate manner when handling hazardous materials and conditions. Topics include Hazardous Material Handling/Cleaning and Disposal of Hazardous Materials.

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

Computer Based Training (CBT)

CBT will support Class/Lab training. Trainees will receive no more than 100 hours of training. Courses include Accounting Essentials, Lennox Residential Product and iComfort Technical training topics.

Commitment to Training

Gilmore allocates approximately \$125,000 annually for training that includes new-hire orientation, staff development and safety training. ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Gilmore has a detailed training plan in place and is ready to begin training upon approval. The Company's HR Manager will administer the Agreement. In addition, the Company has retained a subcontractor, Propel Consulting Group, to assist with administration. Training will be delivered by in-house experts, and vendors.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Propel Consulting Group in El Dorado Hills assisted with development for a flat fee of \$14,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8-200

BUSINESS SKILLS

- Accounting Techniques
- Customer Service
- Financial Analysis
- Leadership & Coaching
- Problem Solving & Decision Making
- Product Knowledge
- Project Management
- Sales Presentation
- Teambuilding
- Written Communications

COMMERCIAL SKILLS

- Blue Print Interpretation
- Building Regulations
- Equipment Operation
- Forklift Operation
- HVAC Installation & Maintenance
- Home Performance Techniques
- Plumbing Techniques
- Project Estimation
- Quality Control
- Solar Installation & Maintenance
- Tool Operation
- Water Heater Installation & Maintenance
- Window & Door Installation

COMPUTER SKILLS

- Automated Phone Systems
- HVAC Learning Solutions
- Intermediate/Advanced MS Office
- Service Titan
- Service Titan Mobile

HAZARDOUS MATERIALS

- Disposal of Hazardous Materials
- Hazardous Material Handling/Cleaning

OSHA 10/30 (WITH OSHA CERTIFIED INSTRUCTOR)

- OSHA 10
- OSHA 30

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

CBT Hours

0 – 100

BUSINESS SKILLS

- Accounting Essentials (1 hour, 20 minutes)
- Accounting Management (1 hour, 10 minutes)
- Call Booking Essentials (1 hour)
- Call Booking Management (10 minutes)
- Coordinating Leads, Sales, and Installs (1 hour, 40 minutes)
- Dispatching Essentials (30 minutes)
- How to Professionally Approach A Customer (15 minutes)
- Lennox Residential Product: 7 Series Mini Splits Sales Training (20 minutes)
- Managing Technician Teams (35 minutes)
- Marketing Programs (20 minutes)
- Membership Programs (2 hours, 5 minutes)
- Mobile Financing Essentials (20 minutes)
- Mobile Sales and Install Essentials (30 minutes)
- Office Essentials (1 hour, 15 minutes)
- Payroll Advanced Topics (40 minutes)
- Payroll Essentials (1 hour, 20 minutes)
- Purchasing & Inventory Essentials (35 minutes)
- Technical Selling Skills (20 minutes)

COMMERCIAL SKILLS

- A/C Electrical Troubleshooting (30 minutes)
- A/C Practical Readings and Measurements (30 minutes)
- Aire-Flo (15 minutes)
- Airflow & The Refrigeration System/Metering Devices (30 minutes)
- Cooling Fundamentals: Technical Learning Path (2 hours)
- Cooling Tune Up: A/C (25 minutes)
- Cooling Tune Up: Heat Pump (20 minutes)
- Electrical Systems Part 1 (30 minutes)
- Electrical Systems Part 2 (30 minutes)
- Equipment Interface Module (EIM) Technical Training (1 hour)
- Features And Component Overview (45 minutes)
- Features, Benefits and Component Review (1 hour, 15 minutes)
- Furnace Practical Readings & Measurements (25 minutes)
- Furnace Sequence of Operation (30 minutes)
- Harmony III Overview, Installation and Wiring (1 hour)
- Healthy Climate Whole Home Stream Humidifier Technical Training (1 hour, 15 minutes)
- Heating Fundamentals: 80% Furnace (52 minutes)
- Heating Tune Up: 80% Furnace (25 minutes)
- Heating Tune Up: 90% Furnace (15 minutes)
- High Efficiency Side Vent Conversion (15 minutes)
- How To Program An iComfort Enabled Indoor unit Replacement Control (15 minutes)
- How To Repair An Aluminum Evaporator Coil (30 minutes)
- iComfort Technical Overview (2 hours)

- iComfort Technical Training Updates (15 minutes)
- iComfort Thermostat Technical Interactive Learning Module (30 minutes)
- iComfort Wi-Fi Technical Training (2 hours, 30 minutes)
- Installation and Set Up (45 minutes)
- Lennox Charge Adjustment Simulation (1 hour)
- Lennox Elite Series: Technical Overview (30 minutes)
- Lennox Residential Product: Gas Furnace Technical Training (2 hours, 10 minutes)
- Lennox Residential Product: GWM Boiler Technical Training (33 minutes)
- Lennox Residential Product: Harmony III System Operation and Diagnostics (1 hour)
- Lennox Residential Product: Harmony III, Unitary Control Configuration (1 hour)
- Lennox Residential Product: Healthy Climate Bypass and Power Humidifiers (30 minutes)
- Lennox Residential Product: iComfort Technical Training (1 hour, 20 minutes)
- Lennox Residential Product: Installing Horizontal Suspension Kit (25 minutes)
- Lennox Residential Product: Residential Packaged Units Technical Training (1 hour, 30 minutes)
- Lennox Residential Product: Series Air Handlers Technical Training (2 hours)
- Lennox Residential Product: Single Zone Mini Split System Technical Training (1 hour, 15 minutes)
- Lennox Residential Product: Technical Training (2 hour, 15 minutes)
- Mini Split Systems (MPA) Technical Overview (1 hour, 35 minutes)
- Mini-Split Systems: Technical Overview (1 hour, 26 minutes)
- Proper Installation (1 hour)
- Series Furnace: Service (45 minutes)
- Series Furnaces: Components and Accessories (1 hour)
- Series Furnaces: Installation and Start Up (1 hour)
- Series Furnaces: Operation and Maintenance (1 hour)
- Standard Installation and Test Procedures of 80% Gas Furnaces (30 minutes)
- Start Up and Diagnostics (45 minutes)
- Technical Learning Guide (1 hour, 17 minutes)
- Technical Overview (1 hour, 10 minutes)
- Technical Overview (3 hours, 45 minutes)
- Technical Training (3 hours)
- The Combustion Process (30 minutes)
- The Lennox Merit Series (30 minutes)
- The Lennox: Technical Training (20 minutes)
- The Refrigeration Cycle (30 minutes)
- The U.S. Department of Energy Regional Standards (25 minutes)
- Understanding and Troubleshooting Pressure Switches Used on Lennox Furnaces (25 minutes)

- Understanding The Heat Pump System (30 minutes)
- Variable Capacity Air Conditioner (2 hours)
- VFR Installation for Advanced Technicians (6 hours, 47 minutes)
- What is VRF? (30 minutes)

COMPUTER SKILLS

- Service Titan
 - Advanced Set Up (2 hours, 30 minutes)
 - Mobile Essentials (2 hours, 35 minutes)
 - Power User Podcast (45 minutes)
 - Set Up Essentials (2 hours, 35 minutes)

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



Training Proposal for:

Marcum LLP

Agreement Number: ET19-0212

Panel Meeting of: August 24, 2018

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

PROJECT PROFILE

Contract Attributes:	Retrainee	Industry Sector(s):	Financial Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Los Angeles, Santa Clara, Orange, San Francisco	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 150	U.S.:1,425	Worldwide: 1,500
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$119,600		\$0	\$0		\$119,600

In-Kind Contribution:	100% of Total ETP Funding Required	\$176,800
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	80	8-200	0	\$1,495	\$17.50
				Weighted Avg: 65			

Minimum Wage by County: \$17.54 per hour for Los Angeles; \$17.50 per hour for Orange County; and \$18.22 per hour for Santa Clara and San Francisco 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
 \$2.22 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Accounting/Audit/Tax Staff		31
Operations Support Staff		49

INTRODUCTION

Founded in 1951, Marcum LLP (Marcum) (www.marcumllp.com) is a full-service accounting firm that provides corporate financial and consulting services. The Company offers accounting, auditing, litigation, business valuation, tax advisory and compliance services. The Company also provides trust and estate planning, wealth and risk management, corporate advisory, and business management services. Marcum serves companies, individuals, private equity funds, and hedge funds.

The Company has four California locations: Los Angeles, Irvine, Santa Clara and San Francisco. Employees from all California locations will participate in the proposed training. This is Marcum’s first ETP Agreement.

PROJECT DETAILS

Marcum’s clientelle is growing, and the Company must provide training and skills to its workforce in order to meet customer needs. Training will include business development, customer service, problem solving, and process improvement. Also, there have been significant changes to the rules and regulations that govern accounting and tax services. Marcum will provide training in technical courses to address industry updates and changes.

Additionally, Marcum will need to train on new technology. The Company recently invested in a new service called Robotic Process Automation (RPA). RPA utilizes robot (bot) technology to automate repetitive manual processes and streamline many data-driven functions. Utilizing RPA will allow Marcum’s clients to implement process automation across a wide variety of applications and systems. RPA will allow this staff to be deployed to other functions requiring first hand analysis and decision making.

Training Plan

Training will be delivered via class/lab and E-learning. For E-learning training, trainers may be located at any of Marcum's four facilities. E-Learning presents an efficient method of training delivery for distance training.

Business Skills: Training will be offered to all occupations. Training will provide employees with industry knowledge and skills to present clear, prudent business solutions to customers.

Commercial Skills: Training will be offered to all occupations. Training will focus on Fraud Awareness, Auditing & Tax Updates and Governmental Compliance, Best Practices, Audit Techniques and other skills.

Computer Skills: Training will be offered to all occupations. This training will focus on Company and industry Proprietary Systems and software.

Continuous Improvement: Training will be offered to all occupations. Training will focus on process improvement, change management, team building, and problem solving as it relates to new financial and accounting services.

Commitment to Training

The Company spends approximately \$400K annually on training in California in sexual harassment prevention, violence in the workplace, new-hire orientation, basic skills training and technical training.

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

➤ Training Infrastructure

Marcum's HR Manager will oversee project administration. Administrative staff has been designated to help facilitate training at each of the four locations. These individuals are tasked with collecting any ETP required data and ensuring the training plan is rolling out as scheduled. The Company has also retained Training Funding Partners to assist with project administration. Training will be provided by in-house experts and vendors as needed.

Electronic Recordkeeping

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

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Marcum retained Training Funding Partners in Fountain Valley to assist with development of this proposal for a flat fee of \$5,500.

ADMINISTRATIVE SERVICES

Marcum also retained Training Funding Partners 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 and E-Learning Hours

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Process Skills
- Business Development/Planning Skills
- Communication/Effective Listening Skills
- Conflict Resolution Skills
- Customer Service Skills
- Product Risk/Compliance
- Presentation Skills
- Sales/Marketing Skills

COMMERCIAL SKILLS

- Audit Skills
- Consulting Skills
 - Accounting Consulting
 - Employee Benefit/Audit Consulting
 - Tax Consulting
 - International Consulting Skills
- Fraud Awareness
- New/Updated Tax Law Skills
- Trust and Estate Planning

COMPUTER SKILLS

- Proprietary System Skills
- Intermediate/Advanced Microsoft Office Skills
- Web Navigation Skills

CONTINUOUS IMPROVEMENT

- Change Management
- Coaching/Feedback Skills
- Critical Thinking Skills
- Leadership Skills
- Problem Solving/Troubleshooting
- Process Improvement/Innovation Skills
- Team Building/Team Management

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



**Amendment Proposal #3 for:
Murrieta Chamber of Commerce
Agreement Number: ET17-0442**

Amendment Effective Date: January 26, 2018

Panel Meeting of: August 24, 2018

ETP Regional Office: San Diego

Analyst: H. Bernard

CURRENT PROJECT PROFILE

<p>Contract Type: Priority/Retrainee SB<100 HUA</p> <p>Counties Served: Riverside, San Bernardino, San Diego, Orange, Los Angeles</p> <p>Union(s): <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Industry Sector(s): Manufacturing Goods Movement Transportation/Logistics</p> <p>Repeat Contractor: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>
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Current Contract Term: April 3, 2017 to April 2, 2019

Current Funding	In-Kind Contribution
\$738,218	\$676,000

AMENDMENT FUNDING

Requested Funding	Support Costs	Amendment Funding	In-Kind Contribution
+ \$184,500	+ \$12,825	+ \$197,325	+ \$176,000

Total Funding
\$935,543

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Phase I Priority Retrainee	Cont. Imp., Business Skills, Computer Skills, Mfg. Skills	301	8 - 200	0	\$924	\$16.16
				Weighted Avg: 48			
2	Deleted						
				Weighted Avg:			
3	Phase I Priority SB<100	Cont. Imp., Business Skills, Computer Skills, Mfg. Skills	166	8 - 200	0	\$1,334	\$16.16
				Weighted Avg: 48			
4	Phase II Priority Retrainee	Cont. Imp., Business Skills, Computer Skills, Mfg. Skills	150	8 - 200	0	\$1,405	\$16.70
				Weighted Avg: 73			
5	Phase II Priority SB<100	Cont. Imp., Business Skills, Computer Skills, Mfg. Skills	75	8 - 200	0	\$3,003	\$16.70
				Weighted Avg: 108			

Minimum Wage by County: Job Numbers 1&3: \$16.16 per hour for Riverside and San Bernardino counties; \$16.72 per hour for San Diego County; \$16.96 per hour for Los Angeles County; and \$17.22 per hour for Orange County. Job Numbers 4 & 5 (Calendar year 2018): \$16.70 per hour in Riverside and San Bernardino counties; \$17.03 per hour in San Diego County; \$17.54 in Los Angeles County; \$17.50 in Orange County.

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

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

Participating employers may use health benefits up to \$2.50 per hour for Jobs 4 & 5 to meet the Post-Retention Wage.

Wage Range by Occupation	
Occupation Title	Wage Range
Job Numbers 1-3	
Administration Staff	
Clerk	
Engineer	
Lead	
Operator I	
Operator II	
Production Worker I	
Production Worker II	

Technician	
Supervisor	
Manager	
Owner (Job 3 only)	
Job Numbers 4 & 5	
Administration Staff	
Clerk	
Engineer	
Lead	
Operator I	
Operator II	
Production Worker I	
Production Worker II	
Technician	
Supervisor	
Manager	
Owner (Job 5 only)	

INTRODUCTION

Founded in 1915 and located in Southwest Riverside County, the Murrieta Chamber of Commerce (Murrieta Chamber) (www.murrietchamber.org) is a nonprofit membership organization whose mission is to create and foster a sustainable business environment in the Murrieta area through networking, promotion and advocacy; and assist small businesses to grow and achieve their goals through education and mentorship. The Murrieta Chamber works in partnership with the City of Murrieta and with other Chambers in Southwest Riverside County that form the Southwest California Legislative Council.

AMENDMENT DETAILS

Employers have expressed a need for additional training hours for current trainees. This Amendment increases training hours and funding for Job Numbers 4 and 5 to ensure Murrieta Chamber can continue to serve employers in the area. The current demand is for priority industry employers.

This Amendment increases funding for Job Numbers 4 and 5. All training will continue to be customized based on individual employer assessments. As amended, the contract is within the FY 2017/18 funding limitations.

This amendment will also increase the maximum training hours in Job Number 5 (Priority Small Businesses) from 60 to 200 to allow additional training for small business trainees consistent with Panel policy.

Summary of Amendment changes:

1. Adds training funds to Job Numbers 4 & 5 (Phase II)
2. Increase the Agreement amount by \$197,325 (from \$738,218 to \$935,543)
3. Increase the weighted average hours in Job Number 4 from 48 to 73 and in Job Number 5 from 48 to 108

4. Increase the cost per trainee in Job Number 4 to \$1,405 (from \$924) and Job Number 5 to \$3,003 (from \$1,334).
5. Increase the range of hours in Job Number 5 from 8-60 to 8-200

MEC Broker Model

Murrieta Chamber will utilize vendors to perform training under this amendment. No more than 50% of the training hours will be delivered by Custom Corporate Communications for approximately \$78,930. Another 50% of the training will be provided by Western Training Group for approximately \$78,930.

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARIZE PRIOR MODS/AMENDS

1. Amendment #1: added Phase II funding, adding Job Numbers 4 & 5 and increasing the Agreement by \$238,650 (from \$499,602 to \$738,252).
2. Modification #2: shifted funding from Job Numbers 2 & 3 to Job Number 1 and deleted Job Number 2. This modification decreased the funding amount by \$34 (from \$738,252 to \$738,218).

CURRENT CONTRACT PERFORMANCE

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

Agreement No.	Approved Amount	Term	No. Trainees (Average)	No. Completed Training	No. Retained
ET17-0442	\$738,218	4/3/17 – 4/2/19	692	267	267

As of 7/19/18, the ETP tracking system reflects that Murrieta Chamber has documented 30,508 reimbursable training hours for 520 trainees, a potential earning of \$650,702 (88% of the Agreement amount). Of the 520 trainees, 267 have completed training and the 90-day retention period (\$362,218 approved as earned).

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

8 – 200

Trainees may receive any of the following:

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
- + Leadership Skills:
 - Finance for Non-Finance People
 - Goal Setting/Time and Priority Management
 - Managing Change
 - Performance Management Skills
 - Team Building
- + Project Management

BUSINESS SKILLS

- + Business Writing Skills
- + Communication Skills
- + Customer Relations
- + Sales Skills
- + Social Media Marketing

COMPUTER SKILLS

- + E- Commerce
- + QuickBooks and Accounting Software Skills
- + Search Engine Optimization
- + Social Media Networking Training
- + Microsoft Office Suite (Jobs 1 & 2: Intermediate/Adv. Only)
 - Word
 - Excel
 - Access
 - PowerPoint

MANUFACTURING SKILLS

- + Advance Measurement Skills
- + Inventory Management
- + Electrical Fundamentals
- + Blue Print Reading

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:

rPlanet Earth Los Angeles, LLC

Agreement Number: ET19-0214

Panel Meeting of: August 24, 2018

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative HUA	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 20	U.S.:20	Worldwide: 20
<u>Turnover Rate:</u>	0%		
<u>Managers/Supervisors:</u> (% of total trainees)	16%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$150,436		\$0	\$0		\$150,436

In-Kind Contribution:	100% of Total ETP Funding Required	\$356,562
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Continuous Impr., Mfg. Skills	17	8-200	0	\$1,248	\$17.54
				Weighted Avg: 48			
2	Retrainee Priority Rate Job Creation Initiative HUA	Business Skills, Continuous Impr., Mfg. Skills	71	8-200	0	\$1,820	*\$13.25
				Weighted Avg: 70			

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

Minimum Wage by County: Job Number 1: \$17.54 per hour for Los Angeles County; and Job Number 2 (Job Creation) HUA Wage: \$13.25 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
 Health Benefits are not being used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Operational Staff		6
Administrative Staff		7
Manager		4
Job Number 2		
Operational Staff		58
Administrative Staff		3
Operational Supervisor		10

INTRODUCTION

Founded in 2015 headquartered in Vernon, rPlanet Earth Los Angeles, LLC (rPlanet) (www.rplanetearth.com) is a wholly owned subsidiary of rPlanet Earth Los Angeles Holdings, LLC. rPlanet is a well-capitalized, innovative manufacturer reusing post-consumer plastics to produce the highest quality packaging with the lowest carbon footprint. Through its vision, rPlanet is building the first of its kind vertically integrated plant (recycling and manufacturing of raw materials to finished goods) in North America. rPlanet plans to build several more similar plants across the U.S. to establish the first fully integrated, coast-to-coast network of packaging manufacturing facilities reusing post-consumer waste to create high-quality products. rPlanet has been designed and built to produce more than 50 million pounds of recycled products annually. Customers include grocery stores; the food service industry; and multinational food, snack and beverage businesses.

The Company operates two facilities in California: Vernon and Los Angeles. This proposal will target workers from both facilities. This will be rPlanet's first ETP Agreement.

PROJECT DETAILS

Investing in proper and timely training is essential to business operations and success. Thus, rPlanet must provide employees with skills to accommodate business needs, products, and services. This involves extensive training to put new technology, processes and practices into place quickly and efficiently, while maintaining superior quality standards. The Company recently invested approximately \$100 million in advanced manufacturing equipment and systems, including manufacturing and recycling machines, an injection molding system and internal software. Staff needs to be trained to utilize the equipment and software. Training is needed to also support the introduction of new products, services, skill sets and technologies.

ETP funds will allow rPlanet to establish itself in the recycle marketplace, attract new customers, and provide the most cutting edge products. ETP funds will also help the Company develop and deliver formalized training to its workforce for the first time.

Retrainee - Job Creation

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

rPlanet recently opened the plant in Vernon and will start production in September. The Company will hire 71 new employees over the next four months across all occupations (Job Number 2) to staff the new production plant and support the Company's investment in new products and equipment. Newly hired employees will require substantial training on the new, advanced equipment to obtain competency. Trainees must be hired within the three-month period prior to Panel approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

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

Business Skills: This training will be offered to all occupations. This training will focus on customer service, strategic planning, product knowledge, teambuilding and leadership skills. Trainees will learn techniques to better serve customer and gain knowledge, including organization, sales and marketing and overall business functions.

Continuous Improvement: This training will be offered to all occupations. Training will focus on making various processes more efficient and cost-effective. Training is designed to maximize worker productivity by promoting recycling principles, problem solving and workflow processes.

Manufacturing Skills: This training will be offered to Operational Staff, Operational Supervisors and Managers. Trainees will gain the skills and knowledge to operate and maintain production equipment, ensure safety standards and product quality, and implement best practices in product manufacturing and recycling operations.

Temporary to Permanent Hiring

The Company will train 50 workers under Panel guidelines for the Temporary-to-Permanent program (Job Numbers 1 and 2). The Company will retain these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. According to

rPlanet, the average time for “converting” temporary workers into full-time permanent employment is 2-3 months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums immediately upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Trainees cannot be enrolled until after they have been hired by the Company into full-time, permanent employment. Until they are hired, retention and post-retention wage requirements cannot be met, and the Company will not receive progress payments.

Commitment to Training

rPlanet has estimated a current annual training budget of approximately \$200,000 including basic computer skills, basic safety, maintenance, operational, compliance and new employee orientation training.

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

➤ Training Infrastructure

Training is scheduled to begin upon Panel approval and will be delivered on-site by in-house staff and vendors, if needed. rPlanet has designated a team that includes HR staff, Manufacturing Controller and Director of Maintenance and Engineer to oversee training and all administrative responsibilities. rPlanet will also utilize a third-party administrator to assist with administration.

High Unemployment Area

All trainees in Vernon (Job Number 2) work in 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%. rPlanet is requesting the 25% wage modification from \$14.62 per hour to \$13.25 per hour for these trainees.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

rPlanet retained California Incentives Group (CIG) in Carlsbad to assist with development of this proposal for a flat fee of \$9,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS:

- Customer Service
- Product Knowledge
- Strategic Planning
- Leadership
- Team Building
- Decision Making
- Coaching and Mentoring
- Sales and Marketing

CONTINUOUS IMPROVEMENT:

- Recycled Product Knowledge
- Recycled Product Regulatory Requirements
- Industry Knowledge
- Workflow
- Quality
- Problem Solving

MANUFACTURING SKILLS

- Manufacturing/Recycling Equipment
- Inventory Logistics
- Chemicals
- Recycled Product Sorting
- Lean Manufacturing
- Sanitation

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



**Panel Amendment #1 Proposal for:
Simpson Strong-Tie Company Inc.
Agreement Number: ET17-0391**

Amendment Effective Date: January 27, 2017

Panel Meeting of: August 24, 2018

ETP Regional Office: San Diego **Analyst:** K. Hernandez

CURRENT PROJECT PROFILE

Contract Type:	Priority/Retrainee	Industry Sector(s):	Manufacturing
Counties Served:	Riverside	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Current Contract Term:	January 26, 2017 to January 25, 2019	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$99,180

AMENDMENT FUNDING

Requested Funding	Total Funding
\$42,750	\$141,930

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description (By Contract Type)	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Priority/Retrainee	Business Skills, Computer Skills, Continuous Impr, Hazardous Materials, OSHA 10/30, PL - Manufacturing Skills	95	8-200	0	\$1,494	\$16.16
				Weighted Avg: 83			

Minimum Wage by County: \$16.16 per hour for Riverside County.

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

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

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

Wage Range by Occupation	
Occupation Title	Wage Range
Customer Service/Sales	
Mechanic	
Production	
Engineering/Information Technology	
Finance	
Manager	

INTRODUCTION

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

AMENDMENT DETAILS

SST requests to increase the Agreement amount to provide sufficient funding for the Company's overall training plan. Training is concentrated on new equipment and process improvement initiatives to support an increase in business needs and changes driven by customers and the industry. Training encompasses several critical areas focused on Lean projects, new product and equipment training, and software systems. Cross training of employees will allow the Company more flexibility with less downtime.

This Amendment increases the Agreement amount by \$42,750 (from \$99,180 to \$141,930) and increases the weighted average training hours from 58 to 83.

RECOMMENDATION

Staff recommends approval of this Amendment.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance:

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0391	\$99,180	01/26/17– 01/25/19	212	0	0*

*Based on ETP Systems, 5,743 reimbursable hours have been tracked for potential earnings of \$103,374 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently delivered and tracked.

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

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- + Business Strategies
- + Customer Service Skills
- + Leadership Skills
- + Sales & Marketing Skills

COMPUTER SKILLS

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

CONTINUOUS IMPROVEMENT

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

HAZARDOUS MATERIALS

- + Hazmat Handling

MANUFACTURING SKILLS

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

OSHA 10 (Certified OSHA Instructor)

- + OSHA 10 (requires 10 hours completion)

OSHA 30 (Certified OSHA Instructor)

- + OSHA 30 (requires 30 hours completion)

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

PL Hours

0 – 40

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

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

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



TRAINING PROPOSAL AMENDMENT
SOUTHWEST BOULDER & STONE, INC.
Approval Type: Panel
Reference Number: 17-0578
Contract Number: 17CS-0007-000

Panel Meeting Date: 08/24/2018
Regional Office: San Diego Regional Office
Analyst Name: Ibarra, Maria
Contract Term Date: 6/5/2017 - 6/4/2019

Revision Number: 4
Requested Date: 07/23/2018
Revision Status: In Executive Review
Effective Date:

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

FUNDING AMENDMENT:

Current Funding (\$)		Requested Funding Increase (\$)		Revised Funding (\$)	
\$93,600.00		\$81,900.00		\$175,500.00	
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In Kind	
\$152,609.00	\$22,891.00	N/A	\$0.00	\$74,412.00	

PROJECT PROFILE

Repeat Contractor:	No			
High Unemployment Area:	Yes	Turn Over Rate(Applicant):	0.83 %	
Industry Sector		Priority Industry		
Manufacturing		Yes		

AMENDMENT REQUEST DETAILS:

Reason for the Amendment Request:

Contractor has earned all funds and requests additional funding of \$75,000 and increase max hours to 200.

REVISED ITEMS:

Costing Group

Attribute	Job Title	No. Trainees		Min Training Hours		Max Training Hours		Estimated Training Hours	
		From	To	From	To	From	To	From	To
Group No. 1 Location: Cathedral City									
S-RET	Production	4	4	8.00	8.00	60.00	200.00	40.00	75.00
	customer service	2	2	8.00	8.00	60.00	200.00	40.00	75.00
	Supervisor/Manager	1	1	8.00	8.00	60.00	200.00	40.00	75.00
Group No. 1 Location: Chula Vista									
S-RET	Production	4	4	8.00	8.00	60.00	200.00	40.00	75.00

	customer service	1	1	8.00	8.00	60.00	200.00	40.00	75.00
	Supervisor/Manager	1	1	8.00	8.00	60.00	200.00	40.00	75.00
Group No. 1 Location: Escondido									
S-RET	Production	2	2	8.00	8.00	60.00	200.00	40.00	75.00
	customer service	1	1	8.00	8.00	60.00	200.00	40.00	75.00
	Supervisor/Manager	1	1	8.00	8.00	60.00	200.00	40.00	75.00
Group No. 1 Location: Indio									
S-RET	Production	3	3	8.00	8.00	60.00	200.00	40.00	75.00
	customer service	3	3	8.00	8.00	60.00	200.00	40.00	75.00
	Supervisor/Manager	1	1	8.00	8.00	60.00	200.00	40.00	75.00
Group No. 1 Location: Pacific Beach									
S-RET	Production	4	4	8.00	8.00	60.00	200.00	40.00	75.00
	customer service	3	3	8.00	8.00	60.00	200.00	40.00	75.00
	Supervisor/Manager	1	1	8.00	8.00	60.00	200.00	40.00	75.00
Group No. 1 Location: SOUTHWEST BOULDER & STONE, INC.									
S-RET	Production	25	25	8.00	8.00	60.00	200.00	40.00	75.00
	customer service	8	8	8.00	8.00	60.00	200.00	40.00	75.00
	sales	6	6	8.00	8.00	60.00	200.00	40.00	75.00
	admin	9	9	8.00	8.00	60.00	200.00	40.00	75.00
	Supervisor/Manager	8	8	8.00	8.00	60.00	200.00	40.00	75.00
S-RET-OWNER	owner	2	2	8.00	8.00	200.00	60.00	40.00	40.00

Waiver Added

Waiver Source	Waiver Choice
<i>Waiver: Cap/Max Hours of Training</i>	
Costing Group #1	60.00
Costing Group #1	60.00
Costing Group #1	60.00
Costing Group #1	60.00
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Costing Group #1	60.00
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Costing Group #1	60.00
Costing Group #1	60.00

Amended Funding Detailed

Funding	Group No.	Attributes	Number Of Trainees	Weighted Average Hours	Reimbursement Rate	Cost Per Trainee	Cost Per Group
OSC	1	S-RET-OWNER	90	75	\$26.00	\$1,950.00	\$175,500.00
		Funding Total:	90				\$175,500.00
		Grand Total:	90				\$175,500.00

Legend of Attributes	
Code	Description
S	Single Employer
RET	Retrainee
OWNER	Owner

Introduction

Established in 1989 and headquartered in Fallbrook, Southwest Boulder & Stone, Inc. (Southwest) is a family-owned, small business specializing in the manufacture, supply, and installation of landscape products. The Company currently has six facilities in Southern California: four in San Diego County and two in Riverside County. The Company’s main products include landscape boulders; specimen water-feature boulders; cobbles and pebbles; flagstone and building stones; natural thin veneers; crushed decorative rocks; eclectic fountains; decorative fire-pits and fire-glass construction rocks; sands, fines, and decomposed granites; soil binders, composts, and mulches; masonry supplies; manufactured stones; blocks and bricks; segmental retaining wall systems; and interlocking pavers. Southwest’s customer base includes retail and public entities; commercial and residential building, masonry, and landscape contractors; pool builders; and residential homeowners.

Amendment Details

This is Southwest’s fourth revision request.

Amendment #1: increase the maximum training hour from 60 to 150.

Amendment #2: administrative revision to reduce applicable wages by occupational/job titles down to 2017 ETP Required Wages.

Amendment #3: extend the contract term from 12 to 24 months.

Company representative reports that Southwest has delivered extensive computer skills training necessary to support the Company’s newly implemented Enterprise Resource Planning (ERP) System as well as various upgraded design software systems. In addition, the Company has ramped up product knowledge and digital marketing training on all new products. Additional training is required for employees to reach competency. However, the Company has already exhausted all its training funds (4,700 hours delivered to 86 eligible trainees). This request will increase the weighted average, thereby increasing the funding amount by \$81,900.

The Company is also requesting to increase the maximum hours from 150 to 200 to allow trainees who have reached the maximum hours to continue training.

Recommendations

Staff recommends approval of this Amendment.

ACTIVE CONTRACT PERFORMANCE

This table summarizes active contract(s) performance for SOUTHWEST BOULDER & STONE, INC.

Contract Number	Approved Amount	Term	Total No. Trainees (Estimated)	Trainees Enrolled	Trainees Completed Training	Total Trainees Retained
17CS-0007-000	\$93,600.00	06/05/2017 - 06/04/2019	90	105	0	0

Based on the ETP System, for the current contract 4712.25 reimbursable hours have been tracked for potential earnings of \$122,518.50 (130.82 % of approved amount)

Curriculum**Exhibit B****Classroom/Simulated Laboratory**

Training Type (Level)	Course/Class Topic
Business Skills	Communication
Business Skills	Conflict Management
Business Skills	Customer Satisfaction
Business Skills	Leadership
Business Skills	Planning
Business Skills	Problem Solving
Business Skills	Product Knowledge
Business Skills	Risk Management
Business Skills	Time Management
Business Skills	Goal Setting
Business Skills	Sales Skills
Business Skills	Teambuilding
Continuous Improvement Skills	Problem Solving/ Decision-making
Continuous Improvement Skills	Process Improvement
Continuous Improvement Skills	Productivity improvement
Continuous Improvement Skills	Quality Systems and Procedures
Hazardous Materials Skills	Hazard Communication (HazCom)
Hazardous Materials Skills	Sales of Propane Procedures
Hazardous Materials Skills	Use of Cleaning Solvents Procedures
Hazardous Materials Skills	Use of Welding Gases Procedures
Computer Skills (Standard)	Adobe Illustrator, Photoshop, Premier Pro
Computer Skills (Standard)	BisTrack/Epicor
Computer Skills (Standard)	Human Resources
Computer Skills (Standard)	Microsoft Office
Computer Skills (Standard)	MS Teams
Computer Skills (Standard)	Payroll
Computer Skills (Standard)	SalesForce CRM
Computer Skills (Standard)	Sharepoint
Computer Skills (Standard)	Website
Computer Skills (Standard)	Microsoft Project
Computer Skills (Standard)	Power BI
Manufacturing Skills (ME) (Standard)	Bagging Machine
Manufacturing Skills (ME) (Standard)	Crane, Excavator & Mini-Excavator
Manufacturing Skills (ME) (Standard)	Equipment Operation
Manufacturing Skills (ME) (Standard)	Installation Procedures
Manufacturing Skills (ME) (Standard)	Job cost
Manufacturing Skills (ME) (Standard)	Material Sourcing
Manufacturing Skills (ME) (Standard)	Materials Handling and Storage
Manufacturing Skills (ME) (Standard)	Mechanical Power Screen

Manufacturing Skills (ME) (Standard)	Power Tool Use and Guarding
Manufacturing Skills (ME) (Standard)	Product Knowledge
Manufacturing Skills (ME) (Standard)	Quality Control
Manufacturing Skills (ME) (Standard)	Signs, Signals and Barricades
Manufacturing Skills (ME) (Standard)	Site Logistics
Manufacturing Skills (ME) (Standard)	Stone Coring, Cutting and Fabricating
Manufacturing Skills (ME) (Standard)	SWPPP (Storm Water Pollution Prevention Program)
Manufacturing Skills (ME) (Standard)	Operational Procedures
Manufacturing Skills (ME) (Standard)	OSHA 10

E-Learning - Instructor Led/Distance Learning

Training Type (Level)	Course/Class Topic
Business Skills	Planning
Business Skills	Productivity
Business Skills	Project Startup
Business Skills	Records Management
Business Skills	Shared Folders
Computer Skills	BisTrack Best Practices
Computer Skills	Crystal Reports
Computer Skills	e-Train BisTrack
Computer Skills	e-Train BisTrack Accounting
Computer Skills	e-Train BisTrack Purchasing
Computer Skills	e-Train BisTrack Sales
Computer Skills	Email Archive
Computer Skills	Email Etiquette
Computer Skills	MS Excel
Computer Skills	MS Office
Computer Skills	MS Outlook
Computer Skills	MS PowerPoint
Computer Skills	MS Word
Computer Skills	SalesForce CRM
Computer Skills	Payroll Software
Manufacturing Skills (ME) (Standard)	Coring and Cutting
Manufacturing Skills (ME) (Standard)	Documentation
Manufacturing Skills (ME) (Standard)	Excavation
Manufacturing Skills (ME) (Standard)	Excavator/Mini-Excavator
Manufacturing Skills (ME) (Standard)	Hand and power tools
Manufacturing Skills (ME) (Standard)	Hazardous Communication
Manufacturing Skills (ME) (Standard)	Job Cost
Manufacturing Skills (ME) (Standard)	Labor Cost and Productivity
Manufacturing Skills (ME) (Standard)	Scheduling

E-Learning - Computer Based Training (CBT)

Training Type (Level)	Course/Class Topic	Stand ard CBT Hours
Business Skills	Planning	1.00
Business Skills	Productivity	1.00
Business Skills	Project Startup	1.00
Business Skills	Records Management	1.00
Business Skills	Shared Folders	1.00
Computer Skills	BisTrack Best Practices	2.00
Computer Skills	Crystal Reports	4.00
Computer Skills	e-Train BisTrack	2.50
Computer Skills	e-Train BisTrack	2.50
Computer Skills	e-Train BisTrack	3.50
Computer Skills	e-Train BisTrack Sales	6.50
Computer Skills	Email Archive	1.00
Computer Skills	Email Etiquette	1.00
Computer Skills	MS Excel	9.00
Computer Skills	MS Office	1.00
Computer Skills	MS Outlook	3.00
Computer Skills	MS PowerPoint	3.00
Computer Skills	MS Word	6.00
Computer Skills	SalesForce CRM	1.00
Computer Skills	Payroll Software	1.00
Manufacturing Skills (ME) (Standard)	Coring and Cutting	2.00
Manufacturing Skills (ME) (Standard)	Documentation	1.00
Manufacturing Skills (ME) (Standard)	Excavation	2.00
Manufacturing Skills (ME) (Standard)	Excavator/Mini-Excavator	8.00
Manufacturing Skills (ME) (Standard)	Hand and power tools	1.00
Manufacturing Skills (ME) (Standard)	Hazardous Communication	2.00
Manufacturing Skills (ME) (Standard)	Job Cost	1.00
Manufacturing Skills (ME) (Standard)	Labor Cost and	1.00
Manufacturing Skills (ME) (Standard)	Scheduling	1.00

Productive Laboratory

Training Type (Level)	Course/Class Topic	Trainer to Trainee	Max Hours
Manufacturing Skills (ME) (Standard)	Bagging Machine	1:1	24.00
Manufacturing Skills (ME) (Standard)	Coring, Cutting and Fabricating Stone	1:1	24.00
Manufacturing Skills (ME) (Standard)	Crane, Excavator & Mini- Excavator	1:1	24.00
Manufacturing Skills (ME) (Standard)	Equipment Operations	1:1	24.00
Manufacturing Skills (ME) (Standard)	Installation Procedures	1:1	24.00

Manufacturing Skills (ME) (Standard)	Material Sourcing	1:1	24.00
Manufacturing Skills (ME) (Standard)	Materials Handling and	1:1	24.00
Manufacturing Skills (ME) (Standard)	Mechanical Power Screen	1:1	24.00
Manufacturing Skills (ME) (Standard)	Power Tool Use and	1:1	24.00
Manufacturing Skills (ME) (Standard)	SWPPP (Storm Water Pollution Prevention Program)	1:1	24.00
Manufacturing Skills (ME) (Standard)	Blending of Psyllium	1:1	24.00



**Training Proposal for:
Stanislaus Business Alliance, Inc.**

Agreement Number: ET19-0205

Panel Meeting of: August 24, 2018

ETP Regional Office: Sacramento

Analyst: C. Kaiser

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SET HUA SB <100	Industry Sector(s):	Manufacturing Services Retail Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Stanislaus, San Joaquin	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$121,420		\$8,418 8%		\$129,838

In-Kind Contribution:	50% of Total ETP Funding Required	\$100,154
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee HUA Priority Rate	Business Skills, Cont. Improv., Mgmt. Skills, Mfg. Skills	18	8-200	0-100	\$4,199	*\$12.53
				Weighted Avg: 151			
2	Retrainee HUA Priority Rate SB <100	Business Skills, Cont. Improv., Mgmt. Skills, Mfg. Skills	32	8-200	0-100	\$1,640	*\$12.53
				Weighted Avg: 59			
3	Retrainee HUA SET SB <100	Business Skills, Cont. Improv.	8	8-200	0-100	\$222	*\$12.53
				Weighted Avg: 8			

*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: Job Numbers 1-3 (HUA): \$12.53 per hour for Stanislaus and San Joaquin Counties.

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

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

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

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Accounts Receivable		1
Dispatchers		2
Executive Assistant		1
Laborers		3
Machinists		10
Maintenance Mechanics		10
Maintenance Technician		1
Operators		3
Packaging Staff		8
Repair Service Technicians		10

Service Administrators		3
Service Writer		1
Shop Helper/Fabricators		3
Supervisors		2

INTRODUCTION

Established in 2002 and headquartered in Modesto, Stanislaus Business Alliance (SBA) (www.opportunitystanislaus.com) fosters workforce and economic development in Stanislaus County and is branching out to multiple Counties. The organization provides business services including workforce hiring, job postings/fairs, and site selection. SBA works closely with a local training institute, VOLT Institute (VOLT), which they helped spearhead. VOLT provides unemployed and employed individuals in industries such as manufacturing, food processing, and parts fabricating with skills based training in areas such as maintenance mechanics, business skills, communication skills, ethics, and LEAN manufacturing.

SBA maintains close working relationships with local employers, including some of the areas largest manufacturers. Through these relationships SBA is able to work with the employers to identify workforce needs. This is accomplished through sit-down meetings and surveys. This will be SBA's first project with ETP.

NEED FOR TRAINING

In this proposal, SBA will continue collaborating with local employers. Employers in the core group are primarily manufacturing companies looking to improve the employee's skills in productivity, customer service, maintenance, and LEAN manufacturing. Training ensures all industry specific regulatory changes are met while improving company outcomes.

The manufacturing industry is continuously changing as new technologies emerge to streamline production and increase efficiency. In recent years, these changes have rapidly accelerated with the use of automated machinery becoming more widespread. These automated machines are highly complex with computer systems that are programmed to control all of the moving parts. As a result, conventional mechanical knowledge is insufficient to service these machines and mechanics need additional training in computers and digital literacy. ETP-funded training will enable employers to bridge the skill gap of incumbent staff and respond to unique employer challenges and growth opportunities.

PROJECT DETAILS

Employer demand is determined by direct input from local companies in the surrounding counties of SBA. Each employer is individually assessed to determine their specific needs.

Customized training for individual employers will be provided at the employers' facilities or at the VOLT training institute. Training will be provided to trainees via Class/Lab and Computer Based Training in the following:

Business Skills – Training will be provided to all occupations. Topics include Customer Service, Communication Excellence, and Project Management. Training will provide the skills to effectively and efficiently maintain business operations.

Continuous Improvement – Training will be provided to all occupations. Topics include Quality Improvement and Blueprint Reading. These courses will improve processes.

Management Skills – Training will be provided to Supervisors. Topics include Decision Making and Leadership Skills. Training will generate better managers.

Manufacturing Skills – Training will be provided to Laborers, Machinists, Maintenance Mechanics, Maintenance Technician, Operators, Packing Staff, Repair Service Technicians, Shop/Helper Fabricators, and Supervisors. Topics include Pump Learning Systems, Mechanical Drives Learning Systems, and Logistics. Training will increase production efficiency.

Computer-Based Training

Trainees will receive up to 100 total training hours per-trainee of CBT 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.

Trainees in Job Number 3 qualify under SET guidelines. However, since Job Number 3 is located in an High Unemployment Area (HUA), trainees in Job Number 3 qualify for the ETP Standard Minimum Wages by county.

Commitment to Training

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

➤ Training Infrastructure

Training will be delivered primarily at the participating employers' worksites, with occasional center-based classes for employers with similar training needs. Participating employers will also provide qualified trainers who will train their own employees.

SBA has four staff members, a business coordinator and 3 additional staff members, who will oversee the administration of the ETP Contract.

Impact/Outcome

Training will develop skilled workers to produce more efficiently with less waste and aid California manufacturers and small businesses in gaining more business, which leads to more jobs.

Marketing and Support Costs

SBA markets directly to their associates via mail, email, and direct marketing. Support costs of 8% will be used to recruit additional participating employers and assess employer specific job training requirements throughout the term of the project. Staff recommends the 8% support costs.

Trainer Qualifications

Training will be delivered by outside vendors who are subject matter experts. In addition, some training may also be provided by experienced trainers who work for participating employers.

Training Coordinator

SBA has four employees dedicated to marketing, recruitment, needs assessment, scheduling and ETP administration.

Tuition Reimbursement

Students enrolled in the ETP-funded training 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.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

VOLT Institute of Modesto has been retained to provide training. Fee's vary depending on the trainings. Maintenance Mechanic Program fee: \$7,500; Certified Production Technician fee: \$2,500; Career Accelerator Program fee: \$675; and class workshop fees: \$50/hour.

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

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

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Acumen
- Communication Excellence
- Creativity and Innovation
- Customer Service
- Listening and Speaking
- Project Management
- Public Speaking and Presentation Skills
- Written Communication

CONTINUOUS IMPROVEMENT

- Assembly Drawings & Fasteners
- Audits
- Basic Measurement
- Blueprint Reading
- Contacting the Customer
- Control Charts
- Critical Thinking and Problem Solving
- Documentation
- Handling Conflict
- Inspections
- Introduction to LEAN Concepts
- LEAN
- Precision Measurement
- Prevention and Correction
- Process Documentation
- Production Flow
- Project Management and Problem Solving
- Quality Improvement
- Quality Systems
- Team Building
- Training within Industry (train the trainer)
- Workplace Organization

MANAGEMENT SKILLS (Supervisors Only)

- Decision Making
- Leadership Skills
- Leading a High-Performance Work Team
- Project Management

MANUFACTURING SKILLS

- AC/DC Electrical Learning System
- Basic Electrical Circuits
- Basic Pneumatics Learning System
- Belt Drives

- Bearings and Couplings
- Chain Drives
- Components
- Designing Products
- Dimensional Gauging
- Distribution
- Efficiency for Maintenance
- Electrical Measurement
- Electrical Power
- Equipment Procedures
- Fasteners Learning System
- Floor-Standing Belt Conveyor Learning System
- Gaskets Learning System
- High Vacuum Systems
- Introduction to Programmable Logic Controllers (PLCs)
- Introduction to SPC
- Laser Systems
- Logistics
- Lubrication Concepts
- Machine Automation
- Machine Control Concepts
- Machining Processes
- Machine Tooling
- Machine Tools 1 Learning System
- Maintenance Awareness
- Materials
- Material Testing, Development
- Mechanical Drives Learning Systems
- Mechanical Linkages
- Mechanical Principles
- Packaging
- Print Reading 1 Learning System
- Pneumatic Power Systems
- Production Control
- Production Assembly Learning System
- Production Flow
- Production Planning and Workflow
- Pump Learning Systems (Centrifugal, Diaphragm, Piston)
- Rigging Learning Systems
- Supply Chain and Value Streams
- Total Productive Maintenance
- Types of Production and Manufacturing
- Welding Technology Learning System

CBT Hours

0-100

CONTINUOUS IMPROVEMENT

- Assembly Drawings & Fasteners 44 min.

• Audits	44 min.
• Basic Measurement	44 min.
• Blueprint Reading 1	44 min.
• Blueprint Reading 2	44 min.
• Blueprint Reading 3 (GD &T)	44 min.
• Contacting the Customer	44 min.
• Continuous Improvement 1	44 min.
• Continuous Improvement 2	44 min.
• Control Charts	44 min.
• Documentation	44 min.
• Inspections	44 min.
• Manufacturing Processes and Production Course	44 min.
• Precision Measurement	44 min.
• Prevention and Correction	44 min.
• Process Documentation	44 min.
• Quality Systems	44 min.
• Quality Improvement	44 min.

MANUFACTURING SKILLS

• Advanced Gear Drives	42 min.
• Antifriction Bearing Selection and Maintenance	42 min.
• Assembling Drawings and Fasteners	42 min.
• Ball Bearings	42 min.
• Ball Screw Drives	42 min.
• Band Saw Operation	42 min.
• Basic Electrical Circuits I	42 min.
• Basic Electrical Circuits II	1.29 hrs.
• Basic Pneumatic Circuits	42 min.
• Basic Welding	50 min.
• Bearings and Couplings	1.29 hrs.
• Belt Drives	1.29 hrs.
• Brakes and Clutches	42 min.
• Brake/Clutch Selection and Maintenance	42 min.
• Centrifugal Pump Characteristics	42 min.
• Centrifugal Pump Operation	42 min.
• Centrifugal Pump Performance	42 min.
• Centrifugal Pump Troubleshooting	42 min.
• Chain Drives	1.29 hrs.
• Chain Slings	42 min.
• Circuit Analysis	42 min.
• Combination Circuits	42 min.
• Couplings	42 min.
• Components	1.29 hrs.
• Designing Products	1.29 hrs.
• Diaphragm Pump Learning System	42 min.
• Dimensional Gauging	1.29 hrs.
• Distribution	1.29 hrs.
• Drill Press Operations	42 min.
• Electrical Measurement	1.29 hrs.

• Electrical Power	1.29 hrs.
• Electrical Measurements	42 min.
• Equipment Movement	1.2 hrs.
• Equipment Procedures	1.29 hrs.
• Fasteners	42 min.
• Floor-Standing Belt Conveyor Learning System	42 min.
• Gaskets and Seals	42 min.
• Gaskets Learning System	42 min.
• Gear Drive Selection and Maintenance	42 min.
• Heavy-Duty Chain Drives	42 min.
• Heavy Duty V-Belt Drives	42 min.
• High Vacuum Systems	1.29 hrs.
• Hoists	42 min.
• Hose and Coupling Assembly	42 min.
• Hose Installation	42 min.
• Hydraulic Fittings	42 min.
• Inductance and Capacitance	42 min.
• Industrial Cranes	1.2 hrs.
• Introduction to Chain Drives	36 min.
• Intro to Geometric Dimensioning and Tolerancing	42 min.
• Introduction to Manufacturing Hand Tools	42 min.
• Introduction to Print Reading	42 min.
• Introduction to Rigging	42 min.
• Introduction to SPC	1.29 hrs.
• Introduction to V-Belt Drives	36 min.
• Introduction to the Drill Press	42 min.
• Introduction to the Manual Lathe	42 min.
• Introduction to the Manual Milling Machine	42 min.
• Introduction to Mechanical Drive Systems	36 min.
• Key Fasteners	36 min.
• Laser Systems	1.29 hrs.
• Lathe Operations	42 min.
• Linear Ball Bushings	42 min.
• Lip Seals	42 min.
• Lubrication Concepts I	42 min.
• Lubrication Concepts II	1.29 hrs.
• Machine Automation	1.29 hrs.
• Maintenance Awareness	1.29 hrs.
• Machine Control Concepts	1.29 hrs.
• Machining Processes	1.29 hrs.
• Machine Tooling	1.29 hrs.
• Materials	1.29 hrs.
• Material Testing, Development	1.29 hrs.
• Mechanical Principles	1.29 hrs.
• Mechanical Linkages	1.29 hrs.
• Milling Processes	42 min.
• Multiple Shaft Drives	36 min.
• Non-Threaded Fasteners and Locking Devices	42 min.
• O-Ring Seals	42 min.
• Oxyacetylene Cutting	50 min.

• Packaging	1.29 hrs.
• Piston Pump Learning System	42 min.
• Plain Bearings	42 min.
• Plasma Arc Cutting	50 min.
• Pneumatic Power Systems I	42 min.
• Pneumatic Power Systems II	1.29 hrs.
• Pneumatic Speed Control Circuits	42 min.
• Power Transmission Systems	36 min.
• Precision Shaft Alignment	42 min.
• Principles of Pneumatic Pressure and Flow	42 min.
• Print Dimensioning	42 min.
• Production Planning and Workflow	1.29 hrs.
• Production Control	1.29 hrs.
• Roller Bearings	42 min.
• Slings and Lifts	42 min.
• Spur Gear Drives	36 min.
• Synchronous Belt Drives	42 min.
• Synthetic Slings	1.2 hrs.
• System Characteristics	42 min.
• Torque Basics	42 min.
• Torque Tools	42 min.
• Transformers	42 min.
• Tubing Installation	42 min.
• Turning Operations	42 min.
• Types of Production and Manufacturing	1.29 hrs.
• V-Belt Selection and Maintenance	42 min.
• Welding Preparation	50 min.
• Welding Analysis	50 min.
• Wire Rope	42 min.

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: Stanislaus Business Alliance, Inc.
Reference No: 18-0007

CCG No.: ET19-0204
Page: 1 of 2

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Fiscalini Cheese

Address: 7206 Kiernan Ave.

City, State, Zip: Modesto, CA 95358

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 40

Total # of full-time company employees in California: 40

Company: Lock-N-Stitch, Inc.

Address: 1015 Soderquist Rd.

City, State, Zip: Turlock, CA 95380

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 34

Company: P&F Metals

Address: 301 S. Broadway

City, State, Zip: Turlock, CA 95380

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 3

Total # of full-time company employees worldwide: 45

Total # of full-time company employees in California: 45

Company: Rizo Lopez Foods, Inc.

Address: 201 S. McClure Rd.

City, State, Zip: Modesto, CA 95355

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 12

Total # of full-time company employees worldwide: 257

Total # of full-time company employees in California: 253

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Stanislaus Business Alliance, Inc.
Reference No: 18-0007

CCG No.: ET19-0204
Page: 2 of 2

Company: Royal Summit

Address: 5253 Jerusalem Court Suite G

City, State, Zip: Modesto, CA 95356

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 12

Total # of full-time company employees in California: 5

Company: Sciabica Olive Oil

Address: 2150 Yosemite Blvd.

City, State, Zip: Modesto, CA 95354

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 23

Total # of full-time company employees in California: 23

Company: Varni Brothers Corp.

Address: 400 Hosmer Ave.

City, State, Zip: Modesto, CA 95351

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 250

Total # of full-time company employees in California: 250

Company: Watts Equipment Inc.

Address: 17547 Comconex Rd.

City, State, Zip: Manteca, CA 95336

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 72

Total # of full-time company employees in California: 72



Training Proposal for:

Trace3, LLC

Agreement Number: ET19-0219

Panel Meeting of: August 24, 2018

ETP Regional Office: San Diego

Analyst: M. Ibarra

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Services Technology/IT Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego, Orange, Los Angeles, San Francisco, and Alameda	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 229	U.S.:440	Worldwide: 440
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	12%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$198,900		\$0	\$0		\$198,900

In-Kind Contribution:	100% of Total ETP Funding Required	\$318,750
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Improvement	170	8 - 200	0 - 100	\$1,170	\$17.03
				Weighted Avg: 45			

Minimum Wage by County: \$17.03 per hour for San Diego County; \$17.50 per hour for Orange County; \$17.54 per hour for Los Angeles County; \$18.22 per hour for Alameda and San Francisco Counties.

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

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

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

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Corporate Support Staff		40
Engineering Staff		60
Sales Staff		50
Manager		20

INTRODUCTION

Founded in 2002, and headquartered in Irvine, Trace3, LLC (Trace3) (www.trace3.com) provides computing, data intelligence, and data center solutions to over 3,000 organizations in the technology industry across the United States. The Company offers consulting services, such as designing and implementing information technologies in infrastructure to solve business needs and concerns. It also offers professional services, including analyzing current environment, designing, and implementing solutions to satisfy business needs, leverage existing infrastructure, and improve workflows and organizational processes.

Including the Company's headquarters in Irvine, Trace3 has six offices through five Counties in California and also maintains offices in Texas, Colorado, Arizona, Nevada, Utah, New Jersey, and Idaho. The proposed training plan will target approximately 170 new and existing workers at all the Company's six California offices in Irvine, San Diego, El Segundo, Pasadena, San Francisco, and Pleasanton.

PROJECT DETAILS

Trace3 began its business as a traditional Value-Added Reseller (VAR), a company that adds features or services to an existing (third-party) product for resale. Today, the Company has evolved into a hub of emerging technology services including Data Intelligence, Cloud Technology, Security, Research, and DevOps (IT development and operations).

Trace3 has experienced exponential growth in its security practice specifically in professional services focused on four areas of security: identity and access management; data security; security operations; and security strategy. This growth has generated more than \$100M in product and service revenues in 2017. Trace3's expansion in products and services has allowed the Company to increase its overall full-time employees by 19%, with an increase in California employees by 12%, from 198 to 222, in the last two years.

Trace3 projects growth to continue as it move towards adding managed security services (MSS) throughout 2018 and onward. The Company is also implementing new comprehensive Artificial Intelligence engagements, specifically in server hardware and services, for manufacturing, financial services, and banking industries in 2018 and 2019.

To support overall business growth, Trace3 is committed to providing its workforce with a comprehensive knowledge and skills training program so they can provide high-level service, expertise, and innovation to its customers. The proposed training plan will focus on keeping pace with regulatory requirements, compliance demands, and digital transformation to enable employees to effectively and efficiently develop and deploy new and enhanced technology. Training will not only allow Trace3 to support the needs of a rapidly changing and transforming digital landscape, but also compete with large, established enterprises such as SecureWorks, Trustwave, Optiv, Cisco, CenturyLink, Verizon, and Hewlett Packard Enterprise.

Training Plan

Training will be delivered via Class/Lab, E-Learning (virtual classroom), and self-paced Computer-Based Training (CBT) in the following:

Business Skills – Training topics include Business Process Skills, Business/Technical Writing Skills, Communication Skills, Contract/Negotiation Skills, Customer Service Skills, Presentation Skills, Finance/Accounting Skills, Marketing/Sales Skills, and Train-the-Trainer Skills.

Computer Skills – Training topics include Application Network Skills, Cybersecurity, Computer Programming/Software Development Skills, Data Analytic Skills, Data Storage, Document Sharing/Process System, Enterprise Resource Process System, Information Security/Network Security, Information Technology Infrastructure Library, Intermediate/Advanced MS Office Application Skills, Microsoft Project, Software Installation/Configuration/Management Skills, System Architecture/Design Skills, and Trace3 Proprietary System/Software Application Skills.

Continuous Improvement – Training topics include Business Development Skills, Change Management Skills, Leadership/Coaching Skills, Meeting Management Skills, Performance Improvement/Six Sigma Skills, Project/Program Management Skills, Quality Assurance/Quality Control, Strategic Thinking Skills, Team Building Skills, and Troubleshooting Skills.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company will spend an estimated \$800,000 in 2018 on training in California. The Company

provides training in basic new-hire orientation, anti-harassment, diversity, and basic job skills training to its employees at its own cost.

➤ **Training Infrastructure**

Trace3 plans to contract with an administrative subcontractor to assist with ETP project administration. The Company's Regional People Business Partner as well as the Vice President of People and Organizational Health have overall responsibility of the project. Trace3 has designated its Office Manager at each office to work with two additional employees, LMS Coordinators, who have been designated to assist with the coordination of training and LMS documentation for all facilities. The Regional People Business Partner will also meet with ETP staff and work with Trace3's third-party administrator.

Training will be delivered by in-house instructors, and vendors as needed. Trace3 provides ongoing training; however, implementation of ETP training and documentation of ETP-eligible training will start upon contract approval.

Electronic Recordkeeping

Trace3 currently uses a Learning Management System (LMS) to schedule training and track training attendance. This system has been reviewed and approved by ETP staff.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Trace3 retained Training Funding Partners (TFP) in Fountain Valley to assist with development of this proposal for a flat fee of \$6,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab and E-Learning Hours

8 - 200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Process Skills
- Business/Technical Writing Skills
- Communication Skills
- Contract/Negotiation Skills
- Customer Service Skills
- Finance/Accounting Skills
- Marketing/Sales Skills
- Presentation Skills
- Train the Trainer Skills

COMPUTER SKILLS

- Application Network Skills
- Computer Programming/Software Development Skills
- Cybersecurity
- Data Analytic Skills
- Data Storage
- Document Sharing Process System
- Enterprise Resource Planning System
- Information Security/Network Security
- Information Technology Infrastructure Library
- Intermediate/Advanced MS Office Application Skills (Word/Excel/PowerPoint)
- Microsoft Project
- Software Installation/Configuration/Management Skills
- System Architecture/Design Skills
- Trace3 Proprietary System/Software Application Skills

CONTINUOUS IMPROVEMENT

- Business Development Skills
- Change Management Skills
- Leadership/Coaching Skills
- Meeting Management Skills
- Performance Improvement/Management
- Process Improvement/Six Sigma Skills
- Project/Program Management Skills
- Quality Assurance/Quality Control
- Strategic Thinking Skills
- Team Building Skills
- Troubleshooting Skills

CBT Hours

0 - 100

BUSINESS SKILLS

- Active Listening Skills for Professionals (0.5 hour)
- Adapting Your Conflict Style (0.5 hour)
- Be a Better Listener (0.47 hour)
- Beating Procrastination by Boosting Your Creativity and Drive (0.3 hour)
- Become a Great Listener (0.4 hour)
- Choosing the Right Interpersonal Communication Method to Make Your Point (0.5 hour)
- Developing an Effective Business Case (0.5 hour)
- Difficult People: Can't Change Them, so Change Yourself (0.52 hour)
- Difficult People: Strategies to Keep Everyone Working Together (0.5 hour)
- Difficult People: Why They Act That Way and How to Deal with Them (0.5 hour)
- Facing Confrontation in Customer Service (0.4 hour)
- How Culture Impacts Communication (0.5 hour)
- Keeping Business Calls Professional (0.4 hour)
- Making an Impact with Non-verbal Communication (0.4 hour)
- Mastering Active Listening in the Workplace (0.6 hour)
- Negotiating Well and Going for the Close (0.4 hour)
- Planning an Effective Presentation (0.5 hour)
- Preventing Unhealthy Workplace Conflict (0.5 hour)
- Privacy and Information Security (0.4 hour)
- Prospecting: Panning for Sales Gold (0.4 hour)
- Rapport Building in Customer Service (0.5 hour)
- Receiving Feedback (0.3 hour)
- Roadblocks to Excellent Listening (0.47 hour)
- The Art and Science of Communication (0.3 hour)
- The Discovery Meeting: Starting Off on the Right Foot (0.4 hour)
- Trust Building through Effective Communication (0.4 hour)
- Turning Objection into Opportunity during a Sales Call (0.4 hour)
- Using Communication Strategies to Bridge Cultural Divides (0.5 hour)
- Working Out and Through Conflict (0.5 hour)

COMPUTER SKILLS

- Advanced Formats and Layouts in Excel 2013 (1 hour)
- Advanced Formatting in Word 2013 (1 hour)
- Advanced Formulas and Functions in Excel 2013 (1 hour)
- Collaborating and Sharing Presentations in PowerPoint 2010 (1 hour)
- Collaboration and Customization with the Calendar, Contacts and Tasks in Outlook 2013 (1 hour)
- Creating and Managing Diagrams In Visio 2016 (0.9 hour)
- Creating Photo Albums, Sections, Transitions, and Animations in PowerPoint 2016 (0.7 hour)
- Creating Presentations in PowerPoint 2013 (1 hour)

- Creating Workbooks, Worksheets, and Data in Excel 2013 (1 hour)
- Customizing and Managing Outlook 2016 (1.1 hours)
- Customizing Visual Elements in Excel 2010 (1 hour)
- Formatting and Working with Text in Word 2010 (1 hour)
- Formatting Cells and Worksheets in Excel 2013 (1 hour)
- Formatting Data in Excel 2013 (1 hour)
- Getting to Know Microsoft OneNote 2016 (0.9 hour)
- Headers, Footers, Page Numbering, and Layout in Word 2016 (0.7 hour)
- Introduction to Project Management using Project 2010 (1 hour)
- Managing Conversations and E-mail in Outlook 2016 (0.9 hour)
- Microsoft Excel 2016 Essentials: Charts, Tables, and Images (0.9 hour)
- Microsoft Excel 2016 Essentials: Creating, Editing, and Saving Workbooks (1.1 hours)
- Microsoft Excel 2016 Essentials: Data Presentation Strategies (0.8 hour)
- Microsoft Excel 2016 Essentials: Formatting Data (0.9 hour)
- Microsoft Excel 2016 Essentials: Formulas and Functions (1.1 hours)
- Microsoft Office 2016: First Look Functionality and Collaboration (0.5 hour)
- Microsoft Office 2016: First Look Modern Productivity (0.8 hour)
- Modifying and Formatting Slides in PowerPoint 2016 (1 hour)
- Navigating, Lists, Libraries, Alerts, and Document Sets in SharePoint 2013 (1 hour)
- New Messaging and Collaboration Features in Office 2010 (1 hour)
- Office 2010 New Core Features (1 hour)
- Performing Calculations Using Functions in Excel 2013 (1 hour)
- PivotTable Filters, Calculations, and PowerPivot (1 hour)
- PivotTables and PivotCharts in Excel 2010 (1 hour)
- Presenting Data in Tables and Charts in Excel 2013 (1 hour)
- Reviewing and Protecting Content in Excel 2013 (1 hour)
- Scheduling with Appointments, Events, and Tasks in Outlook 2013 (1 hour)
- Structuring a Document in Word 2013 (1 hour)
- Tools for Tracking Project Performance in Project 2013 (1 hour)
- Using Advanced Slide Show Tools in PowerPoint 2010 (1 hour)
- Using Conditional Formatting, Tables, and Sparklines in Excel 2010 (1 hour)
- Using Illustrations, Styles, and Themes in Word 2016 (1 hour)
- Using PivotTables, PivotCharts, and Advanced Charts in Excel 2013 (1 hour)
- Using Slide Show Presentation Tools in PowerPoint 2016 (0.8 hour)
- Verifying Excel 2010 Data and Formulas (1 hour)
- Visually Enhancing PowerPoint 2010 Presentations (1 hour)
- Workbook Settings, Conditional Formatting, and Number Formats in Excel 2010 (1 hour)
- Working with Microsoft OneNote 2016 (0.9 hour)

CONTINUOUS IMPROVEMENT

- Emotional Intelligence: Building Self-Management Skills (0.52 hour)
- Developing a Personal Accountability Framework (0.4 hour)
- Emotional Intelligence: Owning Your Emotions (0.57 hour)
- Facing Challenges as a First-time Manager (0.3 hour)
- Finding Your Bearings as a Project Manager (0.5 hour)
- Leading through Positive Influence (0.5 hour)
- Maintaining a Cohesive Multigenerational Workforce (0.4 hour)
- Making and Carrying Out Tough Decisions (0.6 hour)
- Managing Multigenerational Employees (0.4 hour)
- Motivating Your Employees (0.4 hour)
- Positive Atmosphere: Establishing a Positive Work Environment (0.4 hour)
- Positive Atmosphere: Establishing an Engaged Workforce (0.4 hour)
- Solving Problems: Framing the Problem (0.52 hour)
- Solving Problems: Generating and Evaluating Alternatives (0.65 hour)
- Staying Balanced in a Shifting World (0.2 hour)
- The Reality of Being a First-time Manager (0.4 hour)
- The Value Proposition: Getting Your Pitch Right (0.4 hour)

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



RETRAINEE - JOB CREATION

Training Proposal for:

CHLB, LLC dba College Medical Center

Agreement Number: ET19-0213

Panel Meeting of: August 24, 2018

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

PROJECT PROFILE

Contract Attributes:	SET Priority Rate Retrainee Job Creation Initiative Medical Skills Training	Industry Sector(s):	Healthcare Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 900	U.S.: 900	Worldwide: 2,475
Turnover Rate:	5%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	=	(High Earner Reduction)	=	Total ETP Funding
\$390,000		\$0		\$0		\$390,000

In-Kind Contribution:	100% of Total ETP Funding Required	\$733,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET Priority Rate Medical Skills Training	Business Skills, Computer Skills, Continuous Improvement, MS Didactic, MS Preceptor	365	8-200	0	\$1,040	\$22.77
				Weighted Avg: 40			
2	Retrainee SET Job Creation Priority Rate Medical Skills	Business Skills, Computer Skills, Continuous Improvement, MS Didactic, MS Preceptor	5	8-200	0	\$2,080	\$14.62
				Weighted Avg: 80			

Minimum Wage by County: Job Number 1 (SET/Priority Industry): SET Priority Industry Statewide Wage \$22.77. Job Number 2 (SET/Priority Industry Job Creation): \$12.12 per hour in Los Angeles County.

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

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

Up to \$2.50 per hour may be used to meet the Post-Retention Wage for trainees in Jobs 1 and 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1		
Administration		30
Certified Nurse Assistant		30
Licensed Vocational Nurse		75
Medical Assistant		30
Medical Social Worker		20
Registered Nurse		130
Technical Support Staff		30
Therapist/Assistant		20
JOB NUMBER 2 (JOB CREATION)		
Administrative Staff		1
Certified Nurse Assistant		1
Licensed Vocational Nurse		1
Medical Assistants		1
Registered Nurse		1

INTRODUCTION

Founded in 1932, CHLB, LLC dba College Medical Center (College Medical Center) (www.collegemedicalcenter.com) is a full-service, community teaching hospital based in Long Beach, California. The hospital was purchased by College Health Enterprises, Inc., a Santa Fe Springs-based healthcare management company, in October 2013. At that time it was renamed College Medical Center. This purchase joined the hospital with College Hospital Cerritos and College Hospital Costa Mesa as affiliates of College Health Enterprises.

College Medical Center has 284 beds and serves patients in the communities of Long Beach, Signal Hill, Lakewood, Carson, Hawthorne, Lawndale and Inglewood. The organization offers services in the areas of behavioral health, cardiopulmonary, epidemiology/infection control, emergency care, family health, intensive care, laboratory, nursing, partial hospitalization, prenatal/OB, pharmacy, physical therapy, radiology, and surgery. College Medical Center also operates residency programs in family medicine, internal medicine, and traditional rotating internships. The hospital has a 36 month medical residency training program. Residencies are accredited by the American Osteopathic Association.

College Medical Center is accredited by the Joint Commission on Accreditation of Healthcare Organizations. It has 3 locations; two in Long Beach and one in Hawthorne. It's Main Long Beach Campus has a Level 3 Emergency Medical Service Department. ETP training will take place at all three locations. This will be College Medical Center's first ETP project.

PROJECT DETAILS

College Medical Center must train workers in response to ongoing regulatory changes impacting the healthcare industry and upgrade the skills and competencies of its incumbent employees. Recently graduated Registered Nurses need ongoing training to grow their knowledge on procedures and treatments that will improve patient care. Training will allow the Organization to strengthen and lengthen curriculums, continue to rollout initiatives, and train current staff to effectively care for its patient population. Training initiatives include Quality Assurance and Performance Improvement, Intra-Aortic Balloon Pump Therapy, Emergency Room and Critical Care Nursing, Infection Control and Behavioral Health Services.

College Medical Center is also expanding its pacemaker medical services. Patient demand for pacemakers has increased. The hospital will be hiring additional workers to provide care and support for these new patients. Newly hired trainees in various occupations must learn administrative functions and processes, reporting procedures and new surgical and pre/post-operative procedures.

With the assistance of ETP funding, College Medical Center will be able to provide comprehensive Business, Computer, Continuous Improvement, and Medical Skills training. Training will ensure staff demonstrates confidence and experience in their occupation; proficiency in use of key processes to care for patients with complex health care needs. Overall, training will enable College Medical Center to successfully support its growth while providing superior patient care services, improve quality processes, clinical outcomes, and strategic measures at a reduced cost.

Retrainee - Job Creation

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

College Medical Center must expand its workforce to support the growth of the hospital's growing pacemaker care unit by hiring five net new employees (an Administrative person, CNA, LVN, Medical Assistant and RN) by the end of September. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Training will be delivered via class/lab in the following:

Business Skills: Training will be offered to the Administrative and Technical Support Staff. Trainees will receive training on Accounting Skills, Business Processes, and Effective Report Writing to improve patient satisfaction and operating efficiency.

Computer Skills: Training will be offered to all occupations in various medical software application skills in Care Planning Order Entry, Electronic Medical Records, Lippincott Clinical Database System, Patient Billing and Microsoft Office Suite.

Continuous Improvement: Training will be offered to all occupations in communication, coordination of care, customer service, documentation, problem solving, team building, and quality assessment and improvement skills.

Medical Skills (MS) - Didactic and Preceptor training will be provided to Medical Professionals. Training will provide staff with a well-rounded knowledge of Training covering a broad range of topics including: Charge Nurse Training, Emergency and ICU Care, Diabetes Care and Management, Infection Prevention, Medical Terminology, Pacemakers, Telemetry Nursing Skills, Medical/Surgical processes and Trauma Nursing Skills. The result of this training will be to improve patient care and improved treatment outcomes.

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

Commitment to Training

College Medical Center's training budget is approximately \$980,000 per year. Training programs include staff orientation, staff in-services, sexual harassment prevention, safety, vocational and basic skills training. ETP funds will not displace the existing financial commitment to training.

➤ Training Infrastructure

College Medical Center has a detailed training plan in place and is ready to start upon approval. The Clinical Education Coordinator will oversee the project from the main Campus; and has assigned a training coordinator at each of the other two locations. Staff at each facility will oversee training and assist with the administration of this project. Currently, all training will be delivered by in-house experts, and training vendors may be hired as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

National Training Company, Inc. in Irvine assisted with development for a flat fee of \$15,000.

ADMINISTRATIVE SERVICES

Nationa Training Company, Inc. will also perform administrative services for an amount not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

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

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting Skills
- Budget Analysis
- Business Processes
- Effective Report Writing
- Strategic Planning

COMPUTER SKILLS

- Care Planning Order Entry
- Computer/Internet Applications
- Computerized Reports
- Cyber Security Tools
- Database Administration
- Document Control
- EBSCO Clinical Database System
- Electronic Medical Records
- Electronic Prescriptions
- Electronic Table for Bedside Charting
- Evidence Based Practice
- File Management and Scanning Skills
- Human Resources Database System
- Lippincott Clinical Database System
- Medical Recordkeeping System
- MS Office (Intermediate and Advanced)
- Order Entry
- Patient Billing
- Physician Order Entry
- Software Development

CONTINUOUS IMPROVEMENT

- Case Management
- Clinical Services System Management
- Communication Skills
- Conflict Resolution Skills
- Critical Thinking Skills
- Culturally-Appropriate Care
- HIPPA
- Inspection Procedures
- Interdisciplinary Teams
- Management Essentials

- Quality Control
- Service Excellence
- Standard Operating Procedures
- Team Building
- Team Problem Solving
- Time Management Skills

MEDICAL SKILLS – DIDACTIC

- Acute Myocardial Infarction
- Acute Psychiatric Care
- Advanced Cardiac Life Support
- Anesthesia Management
- Arterial Blood Gas Interpretation
- Basic Life Support
- Behavioral Health Nursing Skills
- Blood Transfusion Management
- Body Mechanics
- Cardiac Monitoring
- Cardiovascular Management
- Case Management
- Central Lines Management
- Charge Nurse Training
- Chest Pain Training
- Chest Tubes
- Code Blue Response & Procedures
- Crash Cart
- Critical Care Nursing Skills
- Decontamination Procedures
- Defibrillator Training
- Neurovascular System
- Diabetes Care and Management
- Educating the Patient & Family
- EKG & Cardiac Monitoring
- Emergency Room Nursing Skills
- Fall Prevention
- Fluid and Electrolyte Imbalances
- Gastrointestinal Management
- Hemodynamic Monitoring
- HIPPA
- Infection Prevention
- Insulin Coverage
- Interdisciplinary Team Process
- Intravenous Medication Administration
- Labor Delivery, and Postpartum Nursing Skills
- Laboratory Skills

- Lifting and Body Mechanics
- Medical Equipment
- Medical Terminology
- Medical/Surgical Nursing Skills
- Medication Administration & Management
- Mental Health Management
- Moderate Sedation
- Nursing Diagnosis Skills
- Nursing Process Skills
- Nutrition
- Oncology Nursing Skills
- Orthopedic Nursing Skills
- Orthopedic Patient
- Ostomy and Continence Care
- Pacemakers
- Pain Management
- Patient and Family Centered Care
- Patient Assessment and Care
- Pre and Post-Operative Care
- Pressure Injury Prevention
- Professional Nursing
- Psychotropic Medications
- Radiology Skills
- Rapid Response Skills
- Renal Management
- Respiratory Management
- Restraints
- Safe Patient Handling
- Social Work
- Stroke Training
- Surgical Nursing Skills
- Surgical Patient
- Swallow Evaluation
- Telemetry Nursing Skills
- Transfer Techniques
- Trauma Nursing Skills
- Triage Nursing Skills
- Ventilator and Tracheotomy Care
- Wound Care

MEDICAL SKILLS – PRECEPTOR

- **Emergency Department**
 - Emergency Care of the Burn Patient
 - Emergency Room Nursing Skills

- Trauma Nursing Skills
- Triage Nursing Skills

- **Intensive Care Unit/Critical Care Unit**
 - Care of Trauma Patient
 - Critical Care Nursing Skills
 - Hemodynamics Training
 - Infection Control
 - Intra-Aortic Balloon Pump(IABP) Therapy
 - Pain Management
 - Patient Assessment and Care
 - Pre and Post-Operative Care
 - Ventilator and Tracheotomy Care

- **Laboratory Services Unit**
 - Infection Control
 - Laboratory Skills
 - Laboratory Testing Procedures
 - Venipuncture

- **Medical/Surgical Unit**
 - Bariatric Nursing Skills
 - Equipment Skills
 - Infection Control
 - Medical/Surgical Nursing Skills
 - Medication Administration and Management
 - Pacemaker Management
 - Pain Management
 - Palliative Care Nursing Skills
 - Patient Assessment and Care
 - Pre and Post-Operative Care

- **Operating Room and Post-Anesthesia Care Unit**
 - Care of the Burn Patient
 - Equipment Skills
 - Medication Administration and Management
 - Pain Management
 - Patient Assessment and Care
 - Pre and Post-Operative Care
 - Trauma Nursing Skills

- **Radiology Services Unit**
 - CT Skills
 - Equipment Skills

- Infection Control
- Patient Assessment and Care
- Patient Fall Prevention
- Radiology Skills
- Ultrasound Skills

- **Rehabilitation Services Unit**
 - Care of Cardiac Patients
 - Equipment Skills
 - Infection Control
 - Kinetic Therapy
 - Medical/Surgical Nursing Skills
 - Occupational Therapy Skills
 - Pacemaker Patients
 - Patient Assessment and Care
 - Patient Fall Prevention
 - Physical Therapy Skills
 - Post-Neurological Injury Nursing Skills
 - Post-Operative Care
 - Post-Orthopedic Surgery Nursing Skills
 - Post-Trauma Injury Nursing Skills

- **Telemetry Unit**
 - Care of the Cardiac Patient
 - Dysrhythmia Interpretation
 - EKG & Cardiac Monitoring
 - Equipment Skills
 - Infection Control
 - Intravenous Therapy
 - Pre and Post-Operative Care
 - Telemetry Nursing Skills

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



Critical Proposal

RETRAINEE - JOB CREATION

Training Proposal for:

Procore Technologies, Inc.

Agreement Number: ET19-0209

Panel Meeting of: August 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Paccereilli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative	Industry Sector(s):	Technology/IT Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Santa Barbara, San Francisco, San Diego	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 804	U.S.: 1,088	Worldwide: 1,220
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	2%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$899,808		\$0	\$0		\$899,808

In-Kind Contribution:	100% of Total ETP Funding Required	\$1,046,199
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills	706	8-200	0	\$728	\$16.70
				Weighted Avg: 28			
2	Retrainee Priority Rate Job Creation Initiative	Business Skills, Computer Skills	212	8-200	0	\$1,820	\$13.66
				Weighted Avg: 70			

Minimum Wage by County: *Job Number 1:* \$16.70 in Santa Barbara County; \$18.22 in San Francisco County; and \$17.03 in San Diego County; *Job Number 2:* \$13.66 for Santa Barbara County; \$15.18 in San Francisco County; and \$14.19 in San Diego County
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 Although health benefits are provided, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Marketing Staff		106
Sales Staff		82
Software Engineer		29
Information Technology Staff		18
Customer Success Staff		238
Finance Staff		15
Business Analyst		12
Operation Staff		176
Administration Staff		10
Product Specialist		198
Human Resources Staff		12
Manager/Supervisor		22

INTRODUCTION

This is a Critical Proposal developed in conjunction with the Governor’s Office of Economic and Business Development (GO-Biz). This project has been designated as a Critical Proposal by GO-Biz because of the Company’s continuous expansion efforts (212 newly-created positions) in its California facilities.

Founded in 2003 and headquartered in Carpinteria, Procore Technologies, Inc. (Procore) (www.procore.com) is a construction management software company. With an award-winning suite of project management tools, over a million registered Procore users across the globe manage all types of construction projects including industrial plants, office buildings, apartment complexes, university facilities and retail centers. The Company serves clients in commercial,

industrial, multifamily, residential, and transportation industries in the United States and internationally. Procore has locations in California, Texas, Oregon, New York, Canada, and Australia. The proposed training will be provided to employees in its California locations in Carpinteria, San Francisco, and San Diego. This will be Procore's third ETP Agreement and third within the last five years.

PROJECT DETAILS

Training will focus on the Company's new proprietary tools and software as well as training of newly-hired employees. Some curriculum courses in this proposal are repeated from the prior Agreements; however, there will be no repeat trainees in those courses.

Training will assist with Procore's mission to provide construction professionals with the most comprehensive and easy-to-use project management platform combined with industry leading customer service. The software industry is rapidly changing and training will allow the Company to remain competitive. Employees require training on current technology. Training will cover proprietary tools, software and approaches such as:

- Procore Mobile - a mobile construction application that enables users to review, create, edit, and share project data with team members from various locations;
- Procore Drive - a document management platform with file uploads and downloads that allows teams to share and collaborate on files without the impediments of FTP clients or other cumbersome file sharing solutions;
- CurrentSet - a drawing management application that organizes construction drawings into one master set; and
- Procore Construction OS - a cohesive platform that connects people, applications, and devices to create a frictionless construction process.

Retrainee - Job Creation

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

To meet customer demand and maintain its market share, Procore is expanding its business capacity, adding new employees in Software Engineering, Operations, Marketing, and Customer Service. Procore will hire 212 new employees (Job Number 2) to develop new ideas, provide better service and support internal operations. The date-of-hire for these trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Business Skills - Training will cover a wide range of sales/marketing tools, customer solutions, content development, network/traffic quality and other strategic skills to create a more efficient business environment and improve quality. Training will also help employees learn the Company's new and enhanced product and service offerings.

Computer Skills - Training will include intermediate and advanced computer software to help trainees work effectively.

Commitment to Training

ETP funds will not displace the Company's existing financial commitment to training. The Company's current California training budget is approximately \$1M and covers new-hire

orientation, personal enrichment, harassment and abusive behavior prevention, hiring skills, behavioral interviewing, and compensation training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Procore has a detailed training schedule in place and is ready to begin training upon Panel Approval. Procore's Learning & Development (L&D) team consisting of 13 members (coaches, people developers, curriculum designers, program managers, coordinators, construction educators, and cultural ambassadors) will provide training and manage internal project administration. Procore's Director of Learning & Development will supervise the L&D team and will oversee all aspects of the ETP contract. An outside administrative consultant has also been retained to ensure that all training records meet ETP compliance.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarized performance by Procore under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
18CS-0118	\$899,728	07/01/2017– 06/30/2019	917	760	685

Based on the ETP System (ETMS), 47,835 hours have been tracked for potential earnings of \$899,728 (100% of approved amount). All retention is expected to complete by September 2018.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET17-0213	Carpinteria, San Francisco, San Diego	08/17/2016– 08/16/2018	\$249,820	\$249,820 (100%)

DEVELOPMENT SERVICES

Procore retained Glendale Community College Professional Development Center (PDC) in Montrose to assist with the development of this proposal at no cost.

ADMINISTRATIVE SERVICES

PDC will also perform administrative services in connection with this proposal for a fee not to exceed 10% of earned funds.

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- ✦ 7 Habits of Highly Effective People
- ✦ Best Practices in Coaching
- ✦ Best Practices in Interviewing
- ✦ Building a Rock Solid Team
- ✦ Business Communications
- ✦ Business Financial Statement
- ✦ Business Systems Continuous Learning
- ✦ Business Writing
- ✦ Change Management
- ✦ Coaching Teams
- ✦ Collaboration
- ✦ Communication Skills
- ✦ Compensation and Motivation
- ✦ Construction 101
- ✦ Construction OS Continuous Learning
- ✦ Construction Personas
- ✦ Crucial Conversations
- ✦ Customer Service
- ✦ Customer Success Continuous Learning
- ✦ Defusing Emotionally Charged
- ✦ Dispute Resolution
- ✦ Diversity as a Business Advantage
- ✦ Emotional Intelligence
- ✦ Employee/Customer Engagement
- ✦ Engineering Continuous Learning
- ✦ Finance Continuous Learning
- ✦ Financial Tools
- ✦ Fish! Individual and Team Motivation
- ✦ Foundations of Construction
- ✦ Framing Up Coaching
- ✦ Giving and Receiving Feedback
- ✦ Goal Setting
- ✦ Handling Difficult Conversations
- ✦ Having a Nice Conflict
- ✦ High Impact Hiring
- ✦ Holding All the ACES
- ✦ Interviewing Skills
- ✦ Leadership Boot Camp 1
- ✦ Leadership Boot Camp 2
- ✦ Leadership Development Suite
- ✦ Leading Meetings
- ✦ Marketing
- ✦ Marketing Continuous Learning

- ✦ Mediation Training
- ✦ Negotiation Skills
- ✦ New Hire Orientation
- ✦ New Leader Assimilation
- ✦ New Manager Training
- ✦ People Team Continuous Learning
- ✦ Performance Management
- ✦ Presenting with Impact
- ✦ Product Continuous Learning
- ✦ Project Management
- ✦ Quality and Safety Tools
- ✦ Resilience
- ✦ Saas Business
- ✦ Sales Continuous Learning
- ✦ Situational Leadership II
- ✦ StandOut Strengths Training
- ✦ Straight Talk
- ✦ Strengths Finder
- ✦ Team Engagement
- ✦ Time Management
- ✦ Transitioning to Leadership
- ✦ Unconscious Bias Training
- ✦ Understanding Procore
- ✦ Understanding Yourself
- ✦ Workplace Experience Continuous Learning

COMPUTER SKILLS

- ✦ 7Geese
- ✦ Airebrake
- ✦ Aireserver
- ✦ Bridge
- ✦ Bugsnag
- ✦ Coding for Non Technical People
- ✦ Concur
- ✦ Confluence
- ✦ Cornerstone
- ✦ EcrionXF
- ✦ Fullstory
- ✦ Google Suite
- ✦ GoToMeeting
- ✦ GoToWebinar
- ✦ Human Resources Software
- ✦ Java script
- ✦ Jira
- ✦ Kapost
- ✦ Microsoft Excel (Int. & Adv.)
- ✦ Mindtouch
- ✦ Mobile Devices
- ✦ Network
- ✦ New Relic
- ✦ Okta
- ✦ Phaseexpress

- ✚ ProjectTango
- ✚ Ruby of Rails
- ✚ Salesforce
- ✚ Seismec
- ✚ Semaphore
- ✚ Sendgrid
- ✚ Skilljar
- ✚ Skuid
- ✚ Slack
- ✚ Smanage
- ✚ Smart Sheets
- ✚ Snagit
- ✚ Softphone
- ✚ Software Advice
- ✚ Talkdesk
- ✚ Tout
- ✚ TravisCI
- ✚ WalkMe
- ✚ Workday
- ✚ Zendesk
- ✚ Zoom

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



RETRAINEE - JOB CREATION

Training Proposal for:

Viasat, Inc.

Agreement Number: ET19-0218

Panel Meeting of: August 24, 2018

ETP Regional Office: North Hollywood

Analyst: J. Romero

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Job Creation Initiative	Industry Sector(s):	Manufacturing Communication Technology/Other Aerospace and Defense Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Diego	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 2,511	U.S.:4,976	Worldwide: 5,341
<u>Turnover Rate:</u>	8%		
<u>Managers/Supervisors:</u> (% of total trainees)	15%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	=	(High Earner Reduction)	=	Total ETP Funding
\$301,236		\$0		\$0		\$301,236

In-Kind Contribution:	100% of Total ETP Funding Required	\$962,027
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills; Computer Skills; Continuous Impr; Mgmt Skills	444	8-200	0-60	\$624	*\$17.03
				Weighted Avg: 24			
2	Retrainee Job Creation Initiative	Business Skills; Computer Skills; Continuous Impr; Mgmt Skills	31	8-200	0-60	\$780	*\$14.19
				Weighted Avg: 30			

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

Minimum Wage by County: Job Number 1: \$17.03 per hour in San Diego County;
 Job Number 2 (Job Creation): \$14.19 per hour in San Diego County
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 Up to \$2.50 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1:		
Administrative Professional		40
Administrative Support		31
Engineer		98
IT/Technical Professional		100
Project/Program Manager		98
Manager/Supervisor		47
Service Worker		10
Technician		20
Job Number 2:		
Administrative Professional		2
Administrative Support		3
Engineer		8
IT/Technical Professional		8
Project/Program Manager		2
Manager/Supervisor		2
Service Worker		3
Technician		3

INTRODUCTION

Located in San Diego, Viasat, Inc. (Viasat) (www.viasat.com) 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. The Company's innovative satellite and various digital communication products enable fast, secure and efficient communications to any location and are used by both commercial and government sectors. This is the Company's fifth ETP training proposal, the second in the last 5 years.

PROJECT DETAILS

The successful launch of communication satellites Viasat-1 in 2011, which paved the way for the launch of Viasat-2 in 2017, initiated tremendous growth and expansion within the Company. With the plans to launch Viasat-3, the Company is focusing on operation efficiency, growth and product development involving new technologies, tools, best practices and skillsets. Training will focus on new equipment and software such as VS3 Satellite Control Software, WB1 Satellite Bus Training, Wlidblue-1, VS3 Satellite Bus Training to support the Viasat-1 and Viasat-2 satellites and employee skill preparation for the launching of Viasat-3. Training will also cover continuous improvement skills such as Lean Six Sigma and ISO 14001 certifications, Scrum Team trainings and on-demand courses on business and management skills.

Viasat's government customers (U.S. Department of Defense) have also been expanding. The Company has "open" contracts to supply the government with next generation equipment: Secure Network Systems (SNS) that focuses on cybersecurity and encryption software, Blue Force Tracking System (BFT-2); Global Tactical Advanced Communications Systems; and MIDS Cryptographic Module. Employees need training on system and software upgrades to support these products.

Retrainee - Job Creation

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

Viasat has grown immensely over the past 5 years. The Company's Carlsbad location is expanding from 13 buildings to an expected 16 buildings by November 2018 and the Company has hired over 1000 employees in that period. The Company anticipates additional growth. Thus, the Company will hire 31 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. Trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Viasat plans to deliver fundamental skills as in the prior Agreement such as: program/project management, risk management, and Lean manufacturing. Training will be for newly-hired employees and staff who did not receive this training before. Training will not be duplicated.

Training will also focus on the latest technological advances and new equipment for the launch of Viasat-3.

Business Skills: This training will be offered to all occupations. Training will enhance employee skills and proficiency in project management and improve efficiency and productivity by enabling

new employees to understand and implement business strategies. Trainees will develop knowledge of interpersonal skills critical in a professional and competitive environment.

Management Skills: Management-level will receive training in management principles, leadership, decision making, coaching and feed-back. This training will benefit both newly-hired and recently promoted management-level employees who have not had the opportunity to receive management skills training.

Computer Skills: This training will be offered to all occupations. Computer skills will focus on newly-acquired computer software and related applications including Avature CRM/ATS, Workday, WildBlue1 and VS3 Satellite Control software. Training is essential to overall productivity and efficiency.

Continuous Improvement: This training will be offered to all occupations. Training will focus on Equipment Operation (WB1 and VS3 Satellite Training), Process Improvement using Viasat's Continuous Maturity Model, Teambuilding, Six Sigma (Black Belt), ISO 14001 and internally driven approval control procedures. These skills will help the Company move toward becoming a high performance workplace.

Computer-Based Training

Viasat will provide up to 60 hours of ancillary Computer-Based Training (CBT) in Business and Computer Skills to reinforce some of the Class/Lab training.

Temporary to Permanent Hiring

The Company will train 15 workers under Panel guidelines for the Temporary-to-Permanent program (Job Number 2). The Company has retained these employees on a temporary basis, with the intention of hiring them into full-time, permanent positions after training. The average time for "converting" temporary workers into full-time permanent employment is 6 months. It is expected that these workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Trainees cannot be enrolled until after they have been hired by the Company into full-time, permanent employment. Until they are so hired, retention and post-retention wage requirements cannot be satisfied and the Company will not receive progress payments.

Commitment to Training

ETP funds will not displace the Company's existing financial commitment to training. The Company spends \$2.8M annually for training. The Company will continue to provide mandatory and job-specific training including orientation, anti-harassment and regulatory training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Viasat is ready to start training upon approval of the Agreement. Viasat's Learning and Management Team, two Learning and Development Specialists and two Learning and Development Coordinators led by the Learning and Development Manager, will administer the ETP Training project. Training will be provided by in-house subject matter experts as well as vendors.

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:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0183	Carlsbad	10/05/15 – 10/04/17	\$422,400	\$301,677 (72%)
ET12-0276	Carlsbad	02/06/12 - 02/05/14	\$196,500	\$185,751 (95%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

ProgressiveEdge, Inc. of Temecula has been retained to provide training for a fee of \$33,800. Other trainers will be identified for ETP record-keeping purposes, as they are retained.

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

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Negotiating Skills
- Program/Project Management
- Government Property Training
- Communication Skills
- Earned Value
- Purchasing Practices
- Shipping and Receiving Processes
- Customer Service
- Business Presentation Skills
- Product Management

COMPUTER SKILLS

- MS Office
- Workday (Human Capital Management System)
- Avature CRM/Avature ATS
- VS3 Satellite Control Software
- WB1 (WildBlue-1) Software
- Technical and Engineering Best Practices
- Advanced Information Technology

CONTINUOUS IMPROVEMENT

- Equipment Operation
 - WildBlue -1 (Satellite Bus Training)
 - VS3 (Satellite Bus Training)
 - Electrostatic Discharge
- Continuous Maturity Model (Process Improvement)
 - Overview
 - Process Management
 - Requirements Management
 - Peer Review
 - Risk Management
 - Communications
 - Estimation
 - Support
- Professional Skills Training
- Engineering Tools
- Departmental Process Training
- Agile
- Team building
- Lean Six Sigma (Black Belt Training)
- Lean Manufacturing
- ISO 14001
- Supplier Collaboration
- Supply Chain Management
- Change Management

MANAGEMENT SKILLS (Managers only)

- Leadership
- Decision Making
- Coaching
- Management Principles
- Feedback

CBT Hours

0 – 60

COMPUTER BASED TRAINING (CBT)

- Achieving High Standards in Business Conduct (1 hour)
- Project Planning/Management (45 minutes)
- Leadership/Management (2 hours)
- Advanced Information Technology (1 hour)
- Interpersonal Communications (30 minutes)

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



Training Proposal for:
United Parcel Service, Inc.
Agreement Number: ET19-0201

Panel Meeting of: August 24, 2018

ETP Regional Office: San Diego

Analyst: H. Bernard

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate HUA	Industry Sector(s):	Transportation/Logistics Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Brotherhood of Teamsters, Western Region Local 572		
Number of Employees in:	CA: 21,216	U.S.: 187,955	Worldwide: 245,164
<u>Turnover Rate:</u>	2%		
<u>Managers/Supervisors:</u> (% of total trainees)	20%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$308,334		\$0	\$0		\$308,334

In-Kind Contribution:	100% of Total ETP Funding Required	\$606,650
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Comm'l Skills, Mngmt. Skills	201	8 - 200	0	\$1,534	\$16.70
				Weighted Avg: 59			

Minimum Wage by County: \$18.22 in Alameda, Contra Costa, Marin, San Mateo, San Francisco and Santa Clara Counties; \$17.54 in Los Angeles County; \$17.50 in Orange County; \$17.03 in San Diego County; \$16.80 in Sacramento County; and \$16.70 in 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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Driver Service Provider		161
On Road Supervisor		36
Manager		4

INTRODUCTION

Headquartered in Atlanta, GA, United Parcel Service, Inc. (UPS) is a global leader in logistics, offering a broad range of solutions including transportation of packages and freight, facilitation of international trade, and deployment of advanced technology. UPS also provides industry-specific customer solutions in healthcare and e-commerce. The Company serves more than 220 countries and territories worldwide. The Company has approximately 105 California locations and over 21,216 full-time California workers.

In 2017 overall volume increased across all products for the Company, with e-commerce representing an ever increasing percentage of total growth. Business-to-Consumer shipments represented 50% of the total US domestic package volume. In addition, the Company has added Saturday operations domestically, covering 50% of the US population. The Company expects to expand in 2018 to cover 60% of the population with six-days-a-week deliveries. Expansion efforts nation-wide are expected to cost approximately \$7 billion over the next three years. In California, the cost is expected to be approximately \$1.9 billion.

PROJECT DETAILS

This is UPS' third ETP Agreement, and the third within the last five years. In its prior project training focused on the opening and implementation of a new Integrad Package Driver Training Center in Menlo Park, where trainees from various locations attended classroom and laboratory training at the new center. The trainee population also included drivers promoted from part-time to full time staff.

The Integrad Package Driver training center in Menlo Park, is UPS' only Integrad Center in California. Integrad is a driver training program that incorporates technology in the form of virtual reality and simulations. This state-of-the-art center was built in 2015 to help support the Company's constant changes by providing skills for Package Drivers and Supervisor/Managers. All training under this proposal will be conducted at the Integrad facility in Menlo Park. Trainees will come from UPS facilities across California to attend the training. UPS will reimburse all travel expenses.

Training in this proposal will focus on Integrad and Management Skills training, however will not be provided to the same trainees who received this training in last ETP project. UPS has introduced new and changing technologies as a part of the Integrad program including 360-degree virtual reality headsets used to simulate the experience of driving on city streets to identify and navigate around road hazards. In addition, training will include new On-Road Integrated Optimization and Navigations software (ORION) which efficiently routes drivers, provides fuel savings, and provides continuous to new volume and delivery prioritizations for time sensitive shipments.

Training Plan

All training will be conducted in a classroom or in a simulated, hands-on laboratory. This includes the use of learning stations in a "mock town", and in-car virtual reality simulations. Package Drivers will receive five consecutive days of training and Supervisor/Managers will receive nine consecutive days of training.

Commercial Skills: Package Selection Methods & Procedures, Customer Service & Package Handling, Scheduling & Planning Skills and New Telematics & Technology Skills

Management Skills: Communication Skills, Management Skills, Loop Dispatch, Work Measurement and Operations Systems

High Unemployment Area

Trainees from approximately 34 locations (Job Number 1) work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25% including locations in Del Norte, Fresno, Imperial, Kern, Los Angeles, Lassen, Mendocino, Merced, Modoc, Monterey, Plumas, San Bernardino, San Joaquin, Santa Barbara, Santa Cruz, Shasta, Siskiyou, Stanislaus, Tulare, Yolo and Yuba. However, UPS is not requesting a wage or retention modification.

Commitment to Training

UPS spends approximately \$7.9 Million on training across California with training such as Space and Visibility, Packaging and Labels, Safe Work Methods and UPS factoids. ETP funds will not displace the existing financial commitment to training. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Training and administration will be overseen by the Western Region Tax Director with assistance by the Tax Supervisor and a Tax Specialist. In addition, four training supervisors and one training manager located at the Menlo Park training site will assist with administration. The Integrad Management team has a training plan currently in place and will schedule all ETP training. Training will be provided by in-house experts at the Integrad location in Menlo Park.

Veterans Program

While UPS hires Veterans and participates in Veteran specific recruiting efforts, the Company is not requesting a Veteran job number. UPS will account for Veteran trainees by reporting demographic information during enrollment of trainees.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0342	Statewide	6/30/15 – 6/29/17	\$749,576	\$309,781 (41%)*
ET13-0238	Statewide	1/28/13 – 1/27/15	\$599,616	\$599,616 (100%)

This project trained 275 trainees of the 772 planned. UPS drivers can receive the Integrad training at the Menlo Park location or at one of the Company's other Integrad training facilities outside California. Some trainees were sent outside of California for training. In addition, the Company trained more part-time drivers than expected. Because not all of the trainees were converted to full time status, they were not eligible for ETP reimbursement which impacted performance. The large number of part-time drivers trained at Menlo Park facility limited the training capacity for the full time drivers, thereby also affecting the performance numbers.

To mitigate this issue moving forward, management will give first training priority at the Integrad facility to full time California staff. This project has been right-sized to the earnings in the last project.

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

- Integrad Driver Service Provider Workshop Skills and Procedures
 - New Integrated Delivery Information Acquisition Training
 - Package Selection Methods/Procedures
 - Customer Service/Package Handling
 - Scheduling/Planning Skills
 - UPS Services/Customer Strategies
 - Integration Stations/Mock Town Deliveries and Pickups
 - New Telematics/Technology Skills
 - New On Road Integrated & Optimization Navigation Skills
 - New Next Generation Small Sort Technology Skills

MANAGEMENT SKILLS (Supervisors/Managers Only)

- Managing Performance for On Road Management
 - Communication Skills
 - Coaching Skills
 - Management Tools – Loop Dispatch/Work Measurement/Operations Systems

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



RICK MIDDLETON
SECRETARY-TREASURER

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

AFFILIATED WITH THE INTERNATIONAL BROTHERHOOD OF TEAMSTERS

450 E. CARSON PLAZA DRIVE, SUITE A • CARSON, CALIFORNIA 90746-3268 • (310) 515-0601 / FAX (310) 515-0942

May 30, 2018

Employment Training Panel
5353 Mission Center Dr., Ste. 110
San Diego, CA 92181

Re: UPS ETP Training Program

Dear Sir or Madam:

I am the Western Region Director of the International Brotherhood of Teamsters (IBT) Package Division. Many local unions affiliated with the IBT represent UPS employees throughout California and ten other western states.

The Teamsters are ardent supporters of employee training and we recognize the importance and crucial role that the ETP Training Program plays in the development of our members.

We support UPS in its efforts to secure funding for this training. Specifically, the training done with our members who are full-time package car and tractor-trailer drivers provides them with the knowledge and skills necessary to compete in this very difficult and competitive business environment.

Should you have any questions, please call me at (602)524-1277.

Sincerely,

Andrew A. Marshall
Western Region Director
Package Division
International Brotherhood of Teamsters



Training Proposal for:

K.W.P.H. Enterprises dba American Ambulance

Agreement Number: ET19-0197

Panel Meeting of: August 24, 2018

ETP Regional Office: Sacramento

Analyst: J. Dongallo

PROJECT PROFILE

Contract Attributes:	SET Retrainee Medical Skills Training HUA Priority Rate	Industry Sector(s):	Healthcare Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno, Madera, Kings, Tulare	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 654	U.S.: 654	Worldwide: 654
<u>Turnover Rate:</u>	3%		
<u>Managers/Supervisors:</u> (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$599,248		\$0	\$0		\$599,248

In-Kind Contribution:	100% of Total ETP Funding Required	\$749,876
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate HUA SET Medical Skills	Business Skills, Computer Skills, Comm'l. Skills, Cont. Impr., HazMat, MS-Didactic, MS-Preceptor, PL-Comm'l. Skills	536	8-200	0	\$1,118	*\$12.53
				Weighted Avg: 43			

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

Minimum Wage by County: Job Number 1 (SET/HUA): \$12.53 for Fresno, Kings, Madera and Tulare counties.

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

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

Up to \$1.49 per hour may be used to meet the Post-Retention Wage for Job Number 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administration Staff		8
Dispatch Support Staff		70
Finance Staff		20
Paramedic/EMT Staff		400
Nurse Staff		10
Operations Staff		18
Training Staff		10

INTRODUCTION

Founded in 1975 and headquartered in Fresno, K.W.P.H. Enterprises dba American Ambulance (American Ambulance) (www.americanambulance.com) provides emergency and non-emergency ambulance transportation in Fresno and Kings Counties. Services range from emergency and non-emergency response transportation, disaster response and event medical services. The Company’s customers include hospitals, healthcare systems, local and state government entities.

This is American Ambulance’s first ETP contract. Training will be conducted at the Company’s Fresno, Madera, Kings and Tulare locations.

PROJECT DETAILS

American Ambulance recently experienced a higher need of services in more remote areas of Central California. This demand has caused the Company to expand its operations beyond rural and inland areas. Training will allow staff to provide specialized services in these remote areas, in which, transport and medical equipment is limited. Training will focus on transportation and treatment of critical care patients.

Training will also ensure compliance with government regulations and staying current on equipment. Training will enable staff to provide quality patient care.

Training will include computer, continuous improvement and medical skills. Training will ensure staff can efficiently care for patients with complex health care needs; collaborate and communicate with other health care professionals to manage quality, cost-effective care for clients. Training will also focus on leadership and effective management of rapidly changing situations. Training will support company growth and facilitate superior patient care service. The Company's goal is to improve quality processes.

Training Plan

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

Business Skills: Training will be offered to all occupations in Business Plan, Communication Skills, Goal Setting, Project Management and Developing Business Relationships.

Computer Skills: Training will be offered to all occupations in the Company's current software systems. Training topics include: Electronic Medical Records Systems, Emergency Medical Response Management Software, Communication Software and Client Management Relationship.

Commercial Skills: Training will be offered to all Paramedic/EMT, Nurse, Operations and Dispatch Staff to improve skills and remain competitive within the industry. These skills will improve the quality and consistency of service to customers. Training topics include Equipment Operation, EVOG, Process and Standards, Transport Logistics and Standardized Protocols.

Continuous Improvement: Training will be provided to all occupations to improve customer service quality and safety. Training topics include Critical Thinking, Documentation of Standard Operating Procedures, Crisis Prevention and Intervention and Equipment Operation.

Hazardous Materials: Training will be offered to Paramedic/EMT and Nurse Staff in the skills necessary to ensure a safe environment while working with patients. Training will be on Hazmat for Patient Care Providers.

Medical Skills Training

Approximately 400 Paramedic/EMT Staff will participate in clinical skills training, including didactic and clinical preceptor training.

Paramedic/EMT Staff will receive one or more modules of MS Didactic training (classroom) in advanced medical care to ensure competency. Didactic training will be provided in conjunction with Clinical with Preceptor (ratio 1:1) training to enhance the learning environment. Together, these training environments will enhance learning opportunity and allow trainees to better understand clinical processes and prepare them for work in a health care environment.

Productive Lab

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

American Ambulance will provide up to 60 hours of PL-Commercial Skills to all Paramedic/EMT, Nurse, Operations, and Dispatch Staff. Staff will receive hands-on training on the operation and maintenance of new equipment. PL will supplement the Class/Lab training courses.

The instructor will be present at all times. In-house trainers will provide training on Field Training, Equipment Operation, Transport Logistics and Standardized Protocols. The trainer will determine the trainee's level of competency at the end of the training. The trainer-to-trainee ratio for PL training shall not exceed 1:1.

SET/HUA Wage Modification

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

Trainees work in a High Unemployment Areas (HUA), with unemployment exceeding the state average by at least 25%. These trainees are eligible for a wage modification to the ETP Minimum Wage rather than the Statewide Average Hourly Wage. American Ambulance requests a wage modification from \$22.77 to \$12.53.

Commitment to Training

American Ambulance has an annual training budget of approximately \$750,000 for its California facilities. The training budget includes healthcare training, equipment operation and services, safety and transport training.

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

Training Infrastructure

The Director of Human Resources (HR), Safety Manager and the Director of Field Operations will oversee training, including coordinating training at each location. An additional HR Specialist will oversee all administrative tasks. Additionally, the Company has retained a third party administrator to oversee all administration. A subject matter expert in each office will deliver training.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Corporate Tax Incentive (CTI) of Rancho Cordova assisted with the development for a flat fee of \$29,962.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting/Finance
- Business Development and Sales
- Business Plan
- Communication Skills
- Conflict Resolution
- Customer Relations
- Developing Business Relationships
- Financial Strategies
- Goal Setting
- Interpersonal Communication
- Inventory Control
- Leadership
- Marketing
- Negotiation and Agreements
- Performance Management
- Presentation Skills
- Product Knowledge
- Program Management
- Project Interview and Forecasting
- Project Management
- Team Cohesiveness
- Time Management

COMPUTER SKILLS

- Electronic Medical Records System
- Accounting Software
- Dispatch Software
- Emergency Medical Response Management Software
- Communication Software
- Navigation Software
- Client Management Relationship
- Billing Software
- Scheduling Software

COMMERCIAL SKILLS

- Processes and Standards
- Standard Operating Procedures
- Transport Logistics and Standardized Protocols
- Emergency Vehicle Operations
- Equipment Operation

CONTINUOUS IMPROVEMENT

- Ambulance Operation Skills
- Call Center & Dispatch Protocols
- Crisis Prevention & Intervention

- Critical Thinking
- Communication
- Customer Service
- Documentation
- EMS Operations
- EMS Communication & Protocols
- EMS Response to Terrorism/Clinical & Ambulance Rotations
- Equipment Operation
- Leadership
- Performance & Quality Improvement
- Preceptor Skills (Train-the-Trainer)
- Standard Operating Procedures
- Transport Logistics and Standardized Protocols

HAZARDOUS MATERIALS

- Hazmat for Patient Care Providers

MEDICAL SKILLS - DIDACTIC

- Abdominal Emergencies
- Abdominal Trauma
- Abuse and Assault
- Acute Interventions for the Chronic-Care Patient
- Advanced Cardiac Life Support
- Advanced Prehospital Care
- Airborne Pathogens
- Airway Management Ventilation
- Allergies and Anaphylaxis
- Ambulance & Medical Equipment Operation
- Anatomy & Physiology
- Assessments
- Basic Life Support
- Basic Cardiac Life Support
- Behavioral/Psychiatric Emergencies and Suicide
- Bleeding and Shock
- Bloodborne Pathogens
- Blunt Trauma
- Body Mechanics
- Burn Treatment
- Cardiac Assessment
- Cardiology
- Care of and Treatment of Shock Patients
- Care of Cardiac Patients
- Care of Geriatric Patients
- Care of the Bariatric Patient
- Care of the Renal Patient
- Care of the Stroke Patient
- Chest and Abdominal Trauma
- Chronic Obstructive Pulmonary Disease
- Clinical Decision Making
- Code Blue Response and Procedures (Cardiac Arrest)

- Critical Care Skills
- Decontamination Procedures
- Diabetic Emergencies and Altered Mental Status
- Dysrhythmia Recognition & Interpretation
- EKG & Cardiac Monitors
- Emergencies for Patients with Special Challenges
- Emergency Medical Care
- Emergency Medical Technician Skills
- Endocrinology
- Environmental Emergencies
- Equipment Operation Skills
- Gastroenterology
- Geriatric Abuse – Special Home
- Geriatric Emergencies
- Gynecology
- Head, Facial and Neck Trauma
- Hematologic and Renal Emergencies Life Span Development
- Hematology
- Hemorrhage and Shock
- Highway Safety and Vehicle Extrication
- Infectious Disease
- Life Span Development
- Lifting and Moving Patients
- Medical Emergencies
- Medical Training
- Medical Transport of High-Risk Patients
- Medication Administration
- Medication Administration & Reconciliation
- Multisystem Trauma
- Musculoskeletal Trauma
- Neonatal
- Neonatology
- Neurological Assessment& Pre-Hospital Care
- Neurology
- Obstetrics & Gynecology
- Orthopedic Assessment& Pre-Hospital Care
- Oxygen Administration
- Pain Management
- Pathophysiology
- Patient Assessment& Pre-Hospital Care
- Pediatric Advanced Life Support
- Pediatric Intensive Care
- Pediatric Patient Care
- Pediatrics
- Penetrating Trauma
- Pharmacology
- Pharmacology & Pharmacokinetics
- Physical Exam Techniques
- Poisoning and Overdose Emergencies
- Prehospital Care

- Pre-Hospital Trauma Life Support
- Psychiatric Patient Care
- Pulmonology
- Respiration and Artificial Ventilation
- Respiratory Arrest
- Respiratory Assessment & Pre-Hospital Care
- Respiratory Emergencies Scene Size-Up
- Restraints
- Soft-Tissue Trauma
- Spinal Trauma
- Standards of Care
- The Challenged Patient
- Therapeutic Communication
- Thoracic Trauma
- Toxicology and Substance Abuse
- Transport Physiology
- Trauma Emergencies
- Trauma to the Head, Neck, and Spine
- Urology and Nephrology
- Ventilation, Perfusion, and Shock: Understanding Pathophysiology
- Ventilator Operation
- Vital Signs and Monitoring Devices

MEDICAL SKILLS - PRECEPTOR (Ratio 1:1)

- Supervised Clinical Field Ambulance Training

Productive Lab Hours

0 – 60

COMMERCIAL SKILLS (Ratio 1:1)

- Equipment Operation
- Emergency Vehicle Operations
- Processes and Standards
- Standard Operating Procedures
- Transport Logistics and Standardized Protocols

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

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



RETRAINEE - JOB CREATION

Training Proposal for:

O'Neill Beverages Co. LLC

Agreement Number: ET19-0202

Panel Meeting of: August 24, 2018

ETP Regional Office: Sacramento

Analyst: K. Jones

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Job Creation Initiative HUA	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Fresno, Marin, San Luis Obispo	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 242	U.S.:242	Worldwide: 242
<u>Turnover Rate:</u>	5%		
<u>Managers/Supervisors:</u> (% of total trainees)	0%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$241,150		\$0	\$0		\$241,150

In-Kind Contribution:	100% of Total ETP Funding Required	\$350,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Literacy Skills, Mfg Skills, OSHA 10, PL-Mfg Skills	213	8-200	0-2	\$910	\$16.70
				Weighted Avg: 35			
2	Retrainee Job Creation Initiative Priority Rate	Business Skills, Computer Skills, Literacy Skills, Mfg Skills, OSHA 10, PL-Mfg Skills	30	8-200	0-2	\$910	*\$13.66
				Weighted Avg: 35			
3	Retrainee Priority Rate HUA	Business Skills, Computer Skills, Literacy Skills, Mfg Skills, OSHA 10, PL-Mfg Skills	22	8-200	0-2	\$910	*\$12.53
				Weighted Avg: 35			

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

Minimum Wage by County: **Job Number 1:** \$16.70 per hour for San Luis Obispo County and \$18.22 per hour for Marin County. **Job Number 2:** \$13.66 per hour for San Luis Obispo County and \$15.18 per hour for Marin County. **Job Number 3:** \$12.53 per hour for Fresno County.

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

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

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

Job Number 2: Up to \$0.41 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Production Staff		135
Maintenance Staff		14
Administrative Staff		24
Sales Staff		40
Job Number 2		
Production Staff		20
Maintenance Staff		2
Administrative Staff		3

Sales Staff		5
Job Number 3		
Production Staff		22

INTRODUCTION

Founded in 2004 and headquartered in Larkspur, O'Neill Beverages Co. LLC (OBC) (<http://www.oneillwine.com/>) is a family-owned and operated winery and distillery specializing in the production and distribution of bulk wine, brandy and spirits. OBC is the 7th largest winery in California with approximately 7,000 acres of vineyard throughout the central valley. The Company also contracts with another 15,000 acres of vineyards throughout the State. OBC's customer base includes retailers and restaurants throughout the United States. This will be OBC's first ETP Agreement. Training will be conducted at OBC's locations in Larkspur, Parlier and Paso Robles.

PROJECT DETAILS

OBC will provide training on production efficiencies. Training, including Kaizen Training, 5S Training, and Lean Manufacturing, will increase production quality and reduce errors. The Company also recently spent \$10 million on new production equipment. Production Staff require training to ensure efficient production techniques. Maintenance Staff require training on the appropriate maintenance and repair techniques.

In addition, OBC recently contracted with several companies to produce a line of premium label wines. Training courses, such as Marketing/Sales Techniques & Strategy, Negotiating and Product knowledge are needed to ensure Sales and Administrative Staff can market this new line.

Training Plan

Class/lab, E-Learning and Productive Lab Training will be provided by in-house experts and vendors as needed in the following:

Business Skills: Training will be provided to Administrative Staff and Sales Staff. Training will promote administrative efficiency and provide staff with the knowledge and skills to run the business effectively. Training topics include Customer Service, Cost Control, Financial Forecasting & Budgeting, Leadership, Marketing/Sales Techniques & Strategy, and Negotiating.

Literacy Skills: Training will be offered to select Production and Maintenance Staff. The training is for staff whose language skills have been deemed a barrier to job advancement. The training will help staff increase their skills and promotional opportunities. Training will cover English as a Second Language.

Computer Skills: Training will be provided to all occupations to improve knowledge of production software and increase employee's proficiency in various business software systems. Training topics include Vitners Advantage Software, Customer Relationship Management (CRM) Software, and Financial Management System Software.

Manufacturing Skills: Training will be offered to Production Staff and Maintenance Staff. Training will focus on new production techniques and Lean processes to ensure efficient production. Training topics include Kaizen Training, Process Capability, Quality Measurement, Systems, Lean Manufacturing, Materials Handling, Process Improvement, Production Scheduling, and Production Operations/Workflow.

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. 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.

Computer-Based Training

CBT will support Class/Lab and ELearning training. Trainees in Job Numbers 1 and 2 will receive no more than two hours of training. The two hour module is titled Office 365 – Microsoft Teams.

Productive Laboratory

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

OBC will train 90 Production and Maintenance Staff on efficient use and maintenance of production equipment and Computer Numeric Control (CNC) machines. PL will also ensure safety and production standards are met. Topics are delivered in the classroom first to introduce trainees to machinery and concepts. Trainees will receive up to 60 hours of PL training with a 1:1 trainer-to-trainee ratio. Training will be at a much slower pace than regular production with significantly higher defects as trainees gain proficiency.

Retrainee - Job Creation

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

OBC is expanding their product offerings to include premium wine. The new products are expected to increase wine production from 1.3 million units per year to 2 million units per year. The increased production requires new equipment and an additional third bottling line. The Company will hire staff to meet client needs and ensure efficient production.

OBC will hire 30 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Commitment to Training

OBC spends in excess of \$350,000 per year on training in California. The Company provides new hire orientation, safety training, California labor laws and regulations, basic computer skills, violence in the workplace prevention, and sexual harassment prevention. ETP funds will not displace the 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

OBC has a detailed training plan in-place and is ready to begin training upon approval. The Director of Human Resources will administer the proposal. A Division Manager and Operations Manager at each facility will be responsible for administration at their particular

facility. The Company also retained a third-party administrator, Sierra Consulting Services, to assist with ETP administrative requirements. Training will be delivered by in-house experts and vendors.

High Unemployment Area

The 22 trainees in Job Number 3 work in a High Unemployment Area (HUA), a region with unemployment exceeding the state average by at least 25%. The Company's location in Fresno County qualifies for HUA status under these standards. The Company is requesting this modification.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

OBC retained Sierra Consulting Services, Inc. of El Dorado Hills to assist with development of this proposal for a flat fee of \$19,000.

ADMINISTRATIVE SERVICES

Sierra Consulting Services, Inc. will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

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

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Business Fundamentals
- Business Writing
- Communication Skills
- Cost Control
- Creative Marketing
- Customer Relationship Management
- Customer Service
- Decision Making
- Employee Engagement
- Financial Analysis
- Financial Forecasting & Budgeting
- Leadership
- Marketing/Sales Techniques & Strategy
- Negotiating
- Operational Skills
- Organizational Structure Development
- Planning and Organization
- Product Knowledge
- Project Management and Methodology
- Relationship Building
- Retaining Customers
- Root Cause Analysis
- Strategic Planning
- Team Building
- Time Management

COMPUTER SKILLS

- Crystal Reports Software
- Customer Relationship Management (CRM) Software
- Financial Management System Software
- Microsoft Office (Intermediate/Advanced)
- Office 365
- SQL Server (Management Studio)
- Vitners Advantage Software

OSHA 10 (Certified OSHA Instructor)

- OSHA 10

MANUFACTURING SKILLS

- 5S Training
- Bottling Production
- Change Management
- Changeover Procedures

- Computer Numeric Control (CNC) Machining
- Cross-Training in Production Equipment Skills
- Crush Equipment
- Electrical and Electronics
- Environment Impact Planning
- Equipment Operation
- Fermentation Tanks
- Forklift
- Hydraulics
- Intermediate/Advanced
- Inventory Control
- Juice/Wine Transfer Operations
- Kaizen Training
- Lean Manufacturing
- Logistics & Shipping
- Machine Maintenance
- Machine Operation
- Manufacturing Practices
- Materials Handling
- Parts and Products Manufacture
- Pneumatics
- Process Capability
- Process Improvement
- Production Operations/Workflow
- Production Scheduling
- Quality Measurement Systems
- Sanitation
- Scheduling
- Storage Tanks
- Troubleshooting
- Warehousing
- Winery Production
- Work Order Processing

LITERACY SKILLS

- English as a Second Language

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

Productive Lab (PL) Hours

0-60

MANUFACTURING SKILLS (Ratio 1:1)

- Bottling Production Equipment Operation
- Wine Production Equipment Operation
- Computer Numeric Control (CNC) Machining

- Forklift Operation
- Hydraulic Diagnostics/Repair
- Pneumatic Diagnostics/Repair

CBT Hours

0-2

COMPUTER SKILLS

- Office 365 – Microsoft Teams (2 Hours)

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



**Training Proposal for:
SAFE Credit Union**

Agreement Number: ET19-0206

Panel Meeting of: August 24, 2018

ETP Regional Office: Sacramento

Analyst: K. Jones

PROJECT PROFILE

Contract Attributes:	Retrainee SET	Industry Sector(s):	Financial Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Placer, Sacramento, Contra Costa, Yolo	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 664	U.S.: 664	Worldwide: 664
<u>Turnover Rate:</u>	17%		
<u>Managers/Supervisors:</u> (% of total trainees)	9%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$408,595		\$0	\$0		\$408,595

In-Kind Contribution:	100% of Total ETP Funding Required	\$433,730
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Computer Skills, Management Skills	112	8-200	0 - 45	\$2,185	\$16.80
				Weighted Avg: 95			
2	Retrainee SET	Business Skills, Computer Skills, Management Skills	75	8-200	0 - 45	\$2,185	\$30.36
				Weighted Avg: 95			

Minimum Wage by County: Job Number 1: \$16.80 per hour for Sacramento County. Job Number 2: \$30.36 SET Statewide Average Hourly Wage.

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

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

Job Number 1: Up to \$0.80 per hour may be used to meet the Post-Retention Wage. Job Number 2: Up to \$2.50 per hour may be used to meet the Post-Retention Wage.

Other Compensation: In Job Number 2, Wealth Advisors and Banking and Finance Staff earn commission. (See Commission Heading)

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 - OSC		
Call Center Representatives		99
Managers		13
Job Number 2 - SET		
Services Representatives		15
Insurance Staff		7
Processing Representatives		11
Banking and Finance Staff		8
Employee Services Staff		2
Information Technology Staff		23
Marketing and Retail Staff		3
Wealth Advisors		2
Frontline Managers		4

INTRODUCTION

Founded in 1940 and headquartered in Folsom, SAFE Credit Union (SAFE) (www.safecu.org) provides financial services such as personal banking, business banking and wealth management. The Company primarily focuses on personal and business loan portfolios. SAFE is a non-profit organization that serves over 180,000 members living in Northern California. The Company also works directly with clients such as SMUD, UC Davis, CalFit and Dignity Health to provide their employees with financial wellness services and advertisement. Training will take place at all 22 locations with the Folsom location participating as the lead facility. Locations of training include Antelope, Citrus Heights, Folsom, Elk Grove, Sacramento, Granite Bay, Fair Oaks, Lincoln, McClellan Park, Pleasant Hill, Rancho Cordova, Rocklin, Roseville, North Highlands, and West Sacramento.

Trainees in Job Number 1 hold positions directly related to call center functions. These trainees are eligible for standard retraining under the out-of-state competition provisions for Call Center.

Trainees in Job Number 2 hold positions related to financial and management services. These trainees will be funded under Special Employment Training (SET), which does not require out-of-state competition. These trainees must earn at least the statewide average hourly wage of \$30.36 at the end of the retention period.

PROJECT DETAILS

This will be SAFE's second ETP Agreement, the second in the last five years. The previous Agreement focused on SAFE's new online banking technology and the expansion of their Rancho Cordova call center. This proposal will focus on new software systems and updated processes and procedures. There will be no duplication of training for the trainees who participated in the prior contract.

SAFE's training need is due to new software such as EZ Teller and Express Accounts Software. EZ Teller was purchased at a cost of \$200,000 and will be implemented branch-wide in November of 2018. Training on the software will begin in October to ensure staff are prepared for the November launch. EZ Teller software is the transaction program that all staff will be using for client transactions. The software will capture and store information about every aspect of each customer interaction, allowing SAFE to provide better banking services. The new system will also allow one staff member to track all transactions paid by the Automated Cash Dispensers (ACD), increasing business efficiencies. SAFE has also purchased Xpress Accounts Software to enable banking staff to better manage the commercial accounts offered to business clients. SAFE purchased Xpress Accounts Software at a cost of \$100,000 and will implement it in December 2018. Training will provide staff with the skills and knowledge to use and apply these systems.

Training will also focus on newly developed business processes and procedures. SAFE's new software requires the Company to update their processes and procedures to ensure the software is integrated efficiently. Courses including Branch Processes and Procedures, Change Management, and Commercial Account Training. This training will provide staff with the tools and knowledge to implement these new policies and procedures.

Training Plan

Class/lab, ELearning and Computer Based Training (CBT) will be provided by in-house experts and vendors as needed in the following:

Business Skills: Training will be provided to all staff to increase knowledge of business processes and enhance branch efficiencies. Training topics include Building Member ETP 130 - Single (06/11/18)

Connections, Business Account Training, Auditing Financial Data, Commercial Account Training, Communication Skills, and Lean Six Sigma Green Belt.

Management Skills: Training will be provided to Managers and Frontline Managers. Training will focus on the development of management's leadership and coaching skills. Courses include The Speed of Trust, Management Essentials, Practicing Mindful Leadership, SAFE Leadership Essentials: Skills for New Leaders, and Coaching Skills.

Computer Skills: Training will be provided to all staff to ensure they have the knowledge and skills required to utilize new software systems. Training topics include EZ Teller Training, Governance of Enterprise IT Boot Camp, HTML Version Training, LaserPro Software, Mobile Device Security and Ethical Hacking, and WireXchange Software.

Computer-Based Training (CBT)

CBT will support Class/Lab training. Trainees in Job Numbers 1 and 2 will receive approximately 45 hours of CBT. Courses include Introduction to ERM, IT Security, Innovative Customer Service Techniques, and Insights from a Project Manager.

Commitment to Training

SAFE spends approximately \$1.2 Million per year on training for all 22 California locations. The Company provides the following training: new hire orientation, safety training, California labor laws and regulations, basic computer skills, violence in the workplace prevention, and sexual harassment prevention. ETP funds will not displace the existing financial commitment to training.

➤ Training Infrastructure

SAFE has a detailed training plan in-place and is ready to begin training upon approval. There will be a designated Manager at each location responsible for uploading training information into SAFE's Learning Management System (LMS). These managers will coordinate with the Employee Services Coordinator (ESC) and Senior Financial Analyst (SFA) on a monthly basis. The ESC and SFA will perform all ETP administration. SAFE has seven trainers that will coordinate and schedule training for all staff. Training will be delivered by in-house experts and training vendors. SAFE developed a conservative training plan that will ensure strong performance under this Agreement. SAFE is requesting approximately 7% less funding than earned under the previous Agreement.

Commission

The Panel may use commission earnings to determine a trainee's hourly wage, if there is a reliable history of commission payment by the employer and if actual payment can be verified. As used herein, "commission" means a percentage or proportion of the sale price, for services rendered in the sale of goods or services, paid to employees whose principal job duty is sales.

SAFE has a formal Commission Plan for Wealth Advisors and Banking and Finance Staff. Commissions are calculated and paid twice monthly. SAFE requests to use commission to meet the Post-Retention wage of \$30.36 for the occupational titles of Wealth Advisors and Banking and Finance Staff in Job Number 2. Commission for these occupations is based on a percentage of services rendered and sold as well as company profits.

Wealth Advisors – Wealth Advisors receive a variable commission based on a percentage of SAFE's labor rate, volume of sales, volume of gross appointments, member satisfaction ratings, and the level of employee expertise plus years of service. Average monthly commission for the 2

Wealth Advisors in Job Number 2 for the last twelve consecutive months (6/1/17 – 6/1/18) was at least \$25.71 per hour.

Banking and Finance Staff – Banking and Finance Staff receive a variable commission based on a percentage of SAFE’s labor rate, sales referrals, number of real estate loans, and the level of employee expertise plus years of service. Average monthly commission for the 8 Banking and Finance Staff in Job Number 2 for the last twelve consecutive months (6/1/17 – 6/1/18) was at least \$13.00 per hour.

Learning Management System (LMS)

Staff has reviewed and approved SAFE Credit’s use of a Learning Management System for recordkeeping.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET16-0384	Folsom	02/01/2016 – 01/31/2018	\$749,610	\$438,417 (58%)

*Performance was low due to a shift in business priorities. Training was delayed due to contract obligations necessitating more staff resources than SAFE originally anticipated. However, to ensure that training is delivered as planned under this proposal, SAFE developed a detailed and more conservative training plan than in the prior Agreement. The Company has also designated several managers to coordinate training at each location. This proposal has been right-sized to less training funds than earned in the previous Agreement to better ensure earning 100% of approved amount.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

- Cisco of San Jose will provide Computer Skills training for a fee of \$2,550 per trainee.
- ONLC Training Centers of Sacramento will provide Computer Skills training for a fee of \$4,500 per trainee.
- DocuSign of San Francisco will provide Computer Skills training for a fee of \$1,800 per trainee.
- LinkedIn of Mountain View will provide Computer Skills training at a total cost of \$69,500.

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

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

8-200 Trainees may receive any of the following:

BUSINESS SKILLS

- Account Payable Training
- Auditing Financial Data
- Better Meeting Workshop
- Branch Processes and Procedures
- Brand Promise Initiative
- Building Member Connections
- Business Account Training
- Business Writing for Banking
- Call Center Training 1
- Call Center Training 2
- Challenging Conversations
- Change Management
- Commercial Account Training
- Communication Skills
- Compensation Training Management
- Creating Customer Loyalty
- E-commerce Strategies
- Epicor/Doc Link Training
- IRA Direct Training
- Known For: Personal Brand Workshop
- Lean Six Sigma Green Belt
- Member Experience Coaching
- NEO - Extreme Promise
- New ASR Workshop
- New Product Roll-Out
- Payments Palooza Training
- Performance Management
- Platform Skills
- Presentation Skills
- Product Knowledge
- Project Management Training
- REAL Forum
- Risk Management
- Succession Planning
- Teambuilding
- Teller Training
- Xpress Account Training

COMPUTER SKILLS

- Agile/SCRUM training
- Branch Suite

- Cisco Network Professional
- Cisco Unified Wireless Networking
- Cisco Voice
- Content Management
- Digital Forensics and Incident Response
- DocuSign Administration
- DocuSign API Development
- DocuSign Salesforce Administration
- Encompass Software
- EZ Teller Training
- Governance of Enterprise IT Boot Camp
- HTML Version Training
- LaserPro Software
- Mobile Device Security and Ethical Hacking
- MS Office Suite (Intermediate/Advanced)
- Performance Pro Software
- Risk and Information System Control Boot Camp
- Service Cloud Admin
- Software Development
- UltiPro Software
- Wireless Ethical Hacking, Penetration Testing and Defenses
- WireXchange Software
- Xpress Accounts Software

MANAGEMENT SKILLS (Managers Only)

- Challenging Conversations
- Coaching Skills
- Communicating Through DiSC
- Communication with the 3 C's: Compassion, Candor, and Confidence
- Conflict Management
- Management Essentials
- Practicing Mindful Leadership
- SAFE Leadership Essentials: Skills for New Leaders
- SAFE Leadership Essentials: Technical Essentials
- Strategic Planning
- Teambuilding
- The Speed of Trust

CBT Hours

0-45

BUSINESS SKILLS

- Advancing Member Connections – 2 hrs.
- After Effects Tips and Techniques: Shortcuts, Navigation, and Project Management – 3 hrs. 6 min.
- Building Member Connections – 3 hrs.
- Business Account Training Pre-work – 2 hrs.
- Business Acumen for Project Managers – 1 hr. 18 min.

- Business Writing for Banking – 5 hrs. 30 min.
- Commercial Accounts Training – 1 hr.
- Communicating Employee Rewards – 24 min.
- Conflict Management – 3 hrs.
- Creating Member Connections – 2 hrs.
- Critical Thinking – 6 hrs.
- Customer Service Leadership – 1 hr. 12 min.
- Customer Service: Creating Customer Value – 36 min.
- Customer Service: Winning Back a Lost Customer – 42 min.
- Employee Engagement – 1 hr. 24 min.
- Innovative Customer Service Techniques – 42 min.
- Insights from a Project Manager – 1 hr. 12 min.
- Managing a Customer Service Team – 1 hr. 30 min.
- Member Accounts – 1 hr. 30 min.
- New ASR Pre-work – 2 hrs.
- OFlows – 30 min.
- Phone-Based Customer Service – 54 min.
- Premiere Pro Guru – 2 hrs. 18 min.
- Product Knowledge 1.1 Membership – 1 hr.
- Product Knowledge 1.2 Saving – 1 hr.
- Product Knowledge 1.3 Checking – 1 hr.
- Product Knowledge 1.4 Money Market – 1 hr.
- Product Knowledge 1.5 Certificates – 1 hr.
- Product Knowledge 2.1 Service – 1 hr.
- Product Knowledge 2.2 Overdraft – 1 hr.
- Product Knowledge 2.3 Branch Service – 1 hr.
- Product Knowledge 3.1 Visa – 1 hr.
- Product Knowledge 3.2 Equity – 1 hr.
- Project Management – 3hrs. 36 min.
- Project Management Foundations – 3 hrs. 18 min.
- Project Management Foundations: Budgets – 1 hr. 12 min.
- Project Management Foundations: Change – 1 hr.
- Project Management Foundations: Communication – 1 hr. 48 min.
- Project Management Foundations: Ethics – 1 hr. 12 min.
- Project Management Foundations: Integration – 1 hr. 6 min.
- Project Management Foundations: Leading Projects – 2 hrs. 18 min.
- Project Management Foundations: Procurement – 1 hr. 24 min.
- Project Management Foundations: Quality – 1 hr. 24 min.
- Project Management Foundations: Requirements – 1 hr. 36 min.
- Project Management Foundations: Risk – 1 hr. 12 min.
- Project Management Foundations: Schedules – 1 hr. 36 min.
- Project Management Foundations: Small Projects – 1 hr. 36 min.
- Project Management Foundations: Stakeholders – 1 hr.
- Project Management Foundations: Teams – 1 hr. 30 min.
- Project Management Simplified – 1 hr. 18 min.
- Project Management: Calculating Earned Value – 1 hr. 6 min.
- Project Management: Government Projects – 1 hr. 6 min.
- Project Management: Preventing Scope Creep – 1 hr. 12 min.
- Project Management: Rescuing Troubled Projects – 1 hr.

- Project Management: Solving Common Project Problems – 1 hr. 6 min.
- Project Management: Technical Projects – 1 hr. 18 min.
- Quality Standards in Customer Service – 1 hr. 6 min.
- Quick Fixes for Poor Customer Service – 36 min.
- SAFE Intro to Cash Rewards – 1 hr.
- Sales Strategies – 6 hrs.
- Service Metrics for Customer Service – 1 hr. 18 min.
- Succession Planning – 4 hrs.
- Time Management – 6 hrs.
- Triple-Threat Project Management – 30 min.

COMPUTER SKILLS

- Adobe Acrobat DC: PDF Commenting for AEC – 2 hrs. 6 min.
- Adobe Animate CC New Features – 30 min.
- Adobe Animate CC: Data-Driven Animation – 1 hr. 36 min.
- Adobe Animate CC: Interactive Animation – 1 hr. 12 min.
- Adobe Bridge CC: Tips, Tricks, and Techniques – 2 hrs. 42 min.
- Adobe Captivate 2017: Animations and Effects – 1 hr. 18 min.
- Adobe Captivate for Systems Training – 2 hrs. 54 min.
- Adobe Captivate: Mobile Training Localization – 48 min.
- Adobe Pen Tool: Mastery – 6 hrs. 54 min.
- Adobe XD New Features – 36 min.
- Agile Project Management Foundations – 1 hr. 18 min.
- Agile Project Management with Microsoft Project – 1 hr. 36 min.
- Agile Project Management: Comparing Agile Tools – 3 hrs.
- All About Wires – 1 hr.
- ALRP Quick Tips – 30 min.
- Database Clinic: MS Excel – 1 hr. 54 min.
- Data-Driven Presentations with Excel and PowerPoint 2016 – 1 hr. 42 min.
- Designing and Prototyping a Mobile App with Adobe XD – 1 hr. 24 min.
- Excel 2016: Advanced Formatting Techniques – 3 hrs. 30 min.
- Excel 2016: Advanced Formulas and Functions – 6 hrs. 18 min.
- Excel 2016: Avoiding Common Mistakes – 1 hr. 42 min.
- Excel 2016: Business Process Analysis – 1 hr. 24 min.
- Excel 2016: Charts in Depth – 4 hrs. 36 min.
- Excel 2016: Cleaning Up Your Data – 2 hrs. 24 min.
- Excel 2016: Conditional Formatting in Depth – 1 hr.
- Excel 2016: Get & Transform – 1 hr. 48 min.
- Excel 2016: Pivot Tables in Depth – 3 hrs. 42 min.
- Excel 2016: Working with Dates and Times – 2 hrs.
- Excel Quick Tips – 24 min.
- Excel Statistics Essential Training:1 – 3 hrs. 48 min.
- Excel: Analyzing and Visualizing Cash Flows – 1 hr. 18 min.
- HTML: Structured Data – 2 hrs. 54 min.
- HTML5: Background Processes with Web Workers – 54 min.
- HTML5: Document Editing – 42 min.

- HTML5: Drag and Drop – 1 hr.
- HTML5: File API – 1 hr.
- HTML5: Geolocation – 36 min.
- HTML5: Graphics and Animation with Canvas – 3 hrs. 6 min.
- HTML5: Managing Browser History – 36 min.
- HTML5: Messaging and Communications – 42 min.
- HTML5: Techniques (2012) – 3 hrs. 12 min.
- HTML5: Video and Audio – 2 hrs. 6 min.
- Image Documents – 1 hr. 30 min.
- Information Security – 1 hr.
- Introduction to ERM – 1 hr.
- IT Security – 2 hrs.
- Randon PAN Training – 30 min.
- SAMSUNG Android Pay – 30 min.
- Transitioning from Waterfall to Agile Project Management – 1 hr. 30 min.
- UltiPro Training – 1 hr.
- Wires Training – 1 hr.
- Word 2016: Advanced Tips and Tricks – 1 hr. 42 min.
- Word 2016: Forms in Depth – 1 hr. 30 min.
- Word 2016: Mail Merge in Depth – 2 hrs. 18 min.
- Xpress Account Training – 1 hr.

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



Critical Proposal
Retrainee – Job Creation
Training Proposal for:
Sunergy California LLC

Agreement Number: ET19-0198

Panel Meeting of: August 24, 2018

ETP Regional Office: Sacramento

Analyst: J. Dongallo

PROJECT PROFILE

Contract Attributes:	Critical Proposal Job Creation Initiative Priority Rate Retrainee	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Sacramento	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 10	U.S.: 10	Worldwide: 2,000
<u>Turnover Rate:</u>	0%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$541,060		\$0	\$0		\$541,060

In-Kind Contribution:	100% of Total ETP Funding Required	\$2,168,000
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Critical Proposal Priority Rate	Business Skills, Computer Skills, Mfg. Skills, PL-Mfg. Skills	9	8-200	0	\$2,340	\$16.80
				Weighted Avg: 90			
2	Job Creation Critical Proposal Priority Rate	Business Skills, Computer Skills, Mfg. Skills, PL-Mfg. Skills	200	8-200	0	\$2,600	*\$14.00
				Weighted Avg: 100			

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

Minimum Wage by County: Job Number 1: \$16.80 per hour in Sacramento County

Job Number 2 (Job Creation): \$14.00 per hour in Sacramento County

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

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

Up to \$0.80 per hour may be used to meet Post-Retention Wage in Job Number 1.

Up to \$1.50 per hour may be used to meet the Post-Retention Wage in Job Number 2.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		6
Managers		3
Job Number 2 (Job Creation)		
Operator Staff		160
Administrative Staff		30
Managers		10

Critical Proposal

Sunergy California LLC (Sunergy) is designated as a “Critical Proposal”, as defined in Title 22, California Code of Regulations (CCR) 4402.2. Sunergy is expanding its facility and workforce from

China to California due to the rapid growth within the industry. This project will assist Sunergy to develop new jobs skills for newly hired and incumbent workers.

INTRODUCTION

Founded in 2017 and headquartered in Sacramento, Sunergy is a subsidiary of China Sunergy Co., a Chinese based manufacturing company that specializes in the production of Photovoltaic (PV) cells and modules. PV converts concentrated sunlight directly to electricity via a photovoltaic effect (the creation of voltage or electric current in a material upon exposure to light). With the Company's continued success in China, Europe and other parts of the world, Sunergy decided to expand its business into the United States and establish a facility in Sacramento.

Sunergy supplies PV cells and modules to large engineering procurement contractors, who perform solar installation to big box stores, such as Home Depot, or power stations. Once these contractors secure large contracts from their commercial and residential customers, Sunergy provides the solar panels for installation. This will be Sunergy's first ETP Agreement. Training under this proposal will be for its Sacramento location.

PROJECT DETAILS

Training will focus on efficiency, productivity and new equipment. The need for training is driven by the Company's recent expansion into the United States market and the hiring of new staff for the Sacramento facility. In addition, training will address the processes related to acquiring new business contracts and learning industry regulatory requirements within the state.

Sunergy has invested \$6M on new equipment in the last few months including Cell Soldering, Laminating, Voltage Testing and Automatic Soldering. This requires Sunergy to provide its workers with operational and equipment specific manufacturing skills training necessary to be efficient and productive.

To standardize operating procedures and meet quality standards as determined within industry regulations, Sunergy has created internal training programs for their high-skilled Operator Staff. These highly skilled occupations will focus training on advanced soldering techniques, laminating processes, and programmable logistics. Training will be provided by in-house subject matter experts and vendors to be identified during the term of the contract. Workers will receive training in equipment, manufacturing, material handling and quality control units.

Retrainee – Job Creation

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

To support the production requirements of their new facility and meet the demands of the solar industry, Sunergy has committed to hiring 200 new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of the contract.

Training Plan

Training will be delivered via class/lab in the following:

Business Skills: Training will be offered to all Administrative Staff and Managers including Project Management, Leadership & Motivation, Teambuilding, Problem Solving and Decision Making. Training will provide workers the necessary skillset to administer the larger enterprise.

Computer Skills: Training will be offered to all occupations. In various software systems tailored to meet customer needs and/or requirements. Topics will include Intermediate/Advanced MS Office and Cost Management Systems.

Manufacturing Skills: Training will be offered to all occupations in Equipment Operation, Computer Numeric Control Machining, Quality Assurance, Error Reduction, Good Manufacturing Practices (GMP), and Electrical Components and Controls. Training will focus on improving formalized systems and processes.

Productive Lab

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

Sunergy will train all Operator Staff and Managers in PL-Manufacturing Skills for approximately 60 hours. PL will allow employees to improve the quality of service provided. Staff will receive hands-on training on the operation and maintenance of new equipment. PL will supplement the Class/Lab training courses.

The instructor will be present at all times. In-house field training officers will deliver training on Equipment Operation, Computer Numeric Control Machining, Quality Assurance, Error Reduction, Equipment Maintenance, Electrical Components and Controls. The trainer will determine the trainee's level of competency at the end of the training. The trainer-to-trainee ratio for PL training shall not exceed 1:1.

Commitment to Training

The Company's current training budget is \$100,000 and for orientation, on-the-job training, safety, harassment prevention and other compliance training.

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

➤ Training Infrastructure

Training is scheduled to begin upon Panel approval. The Human Resources (HR) Manager will oversee all aspects of training. An HR specialist will be responsible for reports and internal data collection for tracking purposes. Additionally, the Company has retained a third party administrator to oversee all administrative responsibilities.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Propel Consulting Group of El Dorado Hills assisted with development for a flat fee of \$27,053.

ADMINISTRATIVE SERVICES

Propel Consulting Group 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

- Business Communication
- Business Performance
- Business Writing
- Financial Analysis
- Leadership & Motivation
- Problem Solving & Decision Making
- Project Management
- Teambuilding

COMPUTER SKILLS

- Cost Management Systems
- Intermediate/Advanced MS Office

MANUFACTURING SKILLS

- Computer Numeric Control Machining
- Continuous Improvement
- Electrical Components & Controls
- Equipment Maintenance
- Equipment Operation
 - Automatic Soldering
 - Cell Soldering
 - Laminating
 - Voltage Testing
- Error Reduction
- Good Manufacturing Practices
- Quality Assurance
- Production & Assembly
 - EVA/TPT & 2nd Glass Add
 - Final Defect Test, Sort, Ship
 - Finish (Laminate, JBOX, Trim, Cure)
 - Glass Preparation
 - String Cells
- Programmable Logistics
- Troubleshooting

Productive Lab Hours

0 – 60

MANUFACTURING SKILLS (ratio 1:1)

- Equipment Operation
 - Automatic Soldering
 - Cell Soldering
 - Laminating
 - Voltage Testing

- Production & Assembly
 - EVA/TPT & 2nd Glass Add
 - Final Defect Test, Sort, Ship
 - Finish (Laminate, JBOX, Trim, Cure)
 - Glass Preparation
 - String Cells

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

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



**Training Proposal for:
Brand Consulting Group, LLC dba Brand College**

Agreement Number: ET19-0210

Panel Meeting of: August 24, 2018

ETP Regional Office:North Hollywood

Analyst: M. Paccereilli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SET HUA	Industry Sector(s):	Technology/IT Technology/Other Multimedia/Entertainment Manufacturing Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	4%		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$886,270		\$62,881 8%		\$949,151

In-Kind Contribution:	50% of Total ETP Funding Required	\$1,037,700
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Advanced Technology	290	8-200	0	\$1,529	\$17.00
				Weighted Avg: 55			
2	Retrainee	Advanced Technology	40	8-200	0	\$1,353	\$17.00
				Weighted Avg: 55			
3	Retrainee Priority Rate SET	Advanced Technology	110	8-200	0	\$1,529	\$22.77
				Weighted Avg: 55			
4	Retrainee SET	Advanced Technology	40	8-200	0	\$1,353	\$30.36
				Weighted Avg: 55			
5	Retrainee SET HUA	Advanced Technology	110	8-200	0	\$1,529	\$17.00
				Weighted Avg: 55			
6	Retrainee Veteran	Advanced Technology	10	8-200	0	\$1,529	\$17.00
				Weighted Avg: 55			
7	Retrainee SB<100	Advanced Technology	30	8-200	0	\$1,529	\$17.00
				Weighted Avg: 55			

SB

Minimum Wage by County: *Job Numbers 1-2 & 5-7:* \$17.54 per hour for Los Angeles County; \$17.50 per hour for Orange County; \$17.03 per hour for San Diego County; and \$16.70 per hour for Kern, Ventura, San Bernardino and Riverside Counties. *Job Number 3 (SET):* \$22.77 Statewide. *Job Number 4 (SET):* \$30.36 Statewide.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Desktop Support		43
System Engineer		37
Network Administrator/ Engineer		136
Network Operations Center (NOC) Technician/Engineer/Operator		143

Data Engineer		8
System Administrator/Analyst		45
PC Technician/Administrator		28
Shoretel Engineer		8
Support Technician		73
Technical Support/Engineer/Analyst		73
IT Manager (except SET)		18
IT Supervisor (except SET)		9
Owner (Job Number 7 only)	N/A	9

INTRODUCTION

Founded in 2004, Brand Consulting Group, LLC dba Brand College (Brand College)(www.brandcollege.edu) is a training agency that provides Information Technology (IT) courses designed to help IT professionals and businesses succeed in today's technology-driven environment.

Brand College is dedicated to facilitating the career development of highly qualified professionals trained to design, implement, and maintain information systems. Participating employers qualify as high-tech companies, software publishing, broadcasting, internet publishing, web hosting/search portals, telecommunications, and other companies facing out-of-state competition. This proposal will also utilize Special Employment Training (SET) funds for frontline workers who earn at least the Statewide Average Hourly Wage in businesses that do not face out-of-state competition.

Veterans Program

Ten Veterans will be trained in this proposal. The Panel has established incentives for training California Veterans.

PROJECT DETAILS

Training Plan

This will be Brand College's seventh ETP Agreement, the fifth within the last five years. As the IT industry enters into a new era of automation, businesses are re-evaluating their needs to take advantage of new complex and sophisticated technologies that require support personnel with advanced training and skills. Employers are seeking training in IT solutions that will streamline processes, secure valued system data, and minimize down time. The proposed training focuses on network architecture and related systems infrastructure to ensure trainees are current on the most advanced network solutions applications in the IT industry.

Curriculum Development

Brand College provides training aligned with the requirements and expectations of the technology industry and California employers. Curriculum development entails participation by the school staff, educators, hiring managers and graduating students. Feedback is solicited during exit interviews of previous participating employers and trainees for continuous improvements to training programs.

The proposed curriculum was developed and reviewed by Brand College's Program Advisory Committee (PAC) which consists of IT professionals and employers. Utilizing current industry

knowledge and expertise, the committee evaluated each training program and recommended modifications and enhancements. Based on the PAC's recommendation, Brand College has made several adjustments in the program which resulted in overall improvements in student's academic success as well as their ability to secure and retain employment.

Advanced Technology

The proposed curriculum is for Advanced Technology (AT) only. AT training will be offered to all occupations to improve technical expertise of IT professionals. This training will focus on network architecture and related system infrastructure to ensure that trainees are current in the most advanced network solutions applications in the IT industry. Due to the complex nature of course materials, the trainer-to-trainee ratio will be 1:10 for AT to allow in-depth coverage and personal attention from the instructor.

Impact/Outcome

Trainees may earn the following certifications: Microsoft Certified System Engineer, Linux Certified Administrator, Cisco Certified Network Administrator, Cisco Certified Network Professional, Cisco Certified Security Professional, Certified Desktop & Network Specialist, Certified Multi-Platform Network Specialist, Certified LAN & WAN Specialist, Cisco Certified Network Expert, and Certified Network Technologies Expert.

Marketing and Support Costs

Through its many years of experience in providing IT training to the private sector, Brand College has accumulated a database of companies across various industries. Brand College also receives a large number of business referrals from key partners such as Microsoft and Cisco. In addition, Brand College relies on valuable contact data gathered from potential clients who frequently visit the school and provide leads online.

Brand College continuously markets their training programs in a variety of ways including personal contact, telephone calls and direct mail to recruit companies. Brand College is requesting 8% support costs to cover the cost of recruiting additional employers and assessing employer-specific job training requirements. Employer recruitment, including the recruitment of small businesses and assessment activities, will continue throughout the contract term.

Commitment to Training

ETP funds will not displace the existing financial commitment to training of participating employers. These employers have a strong commitment to training their employees but lack the necessary resources to fully train them. Some companies are small and do not have a significant training budget; other larger, more established companies have stretched their training budgets to the limit and cannot provide the level of training they would like their employees to receive.

ETP funds will augment participating employer budgets, which are used primarily for basic job skills, and help these companies provide needed training to targeted staff. Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Brand College's Director will oversee the implementation and administration of this project. There are also two internal staff assigned to coordinate marketing, recruitment, class scheduling,

and rosters to ensure that project administration adheres to ETP requirements. They are knowledgeable of the ETP program having participated in administering Brand College's prior ETP projects.

Training will be provided by qualified Brand College instructors certified to teach IT/Networking courses. These trainers have an average of 10 years of experience in the IT industry.

Training will be conducted at Brand College's facility in Glendale. The school is fully equipped with Cisco routers and switches, as well as latest equipment and labs. In addition to the classroom training, the trainees will be exposed to a live, simulated environment.

Special Employment Training

Under Special Employment Training (SET), the participating employer is not required to demonstrate out-of-state competition (Job Numbers 3-5). To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.

➤ Wage Modification

Trainees in Job Number 3 are employed in a priority industry and qualify for SET wage modification up to 25% below the statewide average hourly wage. Brand College requests modification from \$30.36 to \$22.77 for SET priority industries (Job Number 3).

➤ HUA Wage Modification

Trainees (Job Number 5) work in High Unemployment Areas (HUA). This is a region with unemployment exceeding the state average by 15%. Participating employers' locations in Los Angeles, Orange, Kern, Riverside, Ventura, and San Bernardino Counties are in a HUA.

These trainees are eligible to meet the Standard ETP Minimum Wage rather than the SET Statewide Average Hourly Wage. Brand College requests wage modification of \$30.36 to \$17.00 per hour statewide for these trainees (Job Number 5).

Training Agency Certification

Brand College is eligible as a training agency based on the following:

- BPPE licensure valid until March 31, 2019;
- Accreditation granted by Accrediting Commission of Career Schools and Colleges (ACCSC);
- Successful past performance with ETP (see Prior Project table).

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarized performance by Brand College under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0426	\$888,250	03/20/2017– 0319/2019	449	154	130

Based on the ETP Systems, 28,761 reimbursable hours have been tracked for potential earnings of \$778,913(88% of approved amount). The Contractor projects final earnings of 100% based on training in progress and currently committed through October 2018.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0215	Glendale	11/16/2015– 11/15/2017	\$888,250	\$878,914 (99%)
ET14-0312	Glendale	03/01/2014- 02/28/2016	\$802,047	\$723,378 (90%)
ET13-0108	Glendale	09/01/2012– 08/31/2014	\$597,582	\$568,920 (95%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200

Trainees may receive any of the following:

ADVANCED TECHNOLOGY

- CompTIA A+ (PC Hardware Technician)
- Microsoft Certified System Engineer (MCSE)
- Linux+ (Linux Certified Professional)
- Cisco Certified Network Administrator (CCNA)
- Cisco Certified Network Professional (CCNP)
- Cisco Certified Security Professional (CCSP)
- Certified Desktop & Network Specialist (CDNS)
- Certified Multi-Platform Network Specialist (CMNS)
- Certified LAN & WAN Specialist (CLWS)
- Cisco Certified Network Expert (CCNE)
- Certified Network Technologies Expert (CNTE)
- VMware Certified Professional on vSphere 5 (VCP5)

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: AAA Network Solutions

Address: 8401 Page Street

City, State, Zip: Buena Park, CA 90621

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 120

Total # of full-time company employees in California: 120

Company: AdminSure

Address: 3380 Shelby Street

City, State, Zip: Ontario, CA 91764

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 130

Total # of full-time company employees in California: 130

Company: All Covered

Address: 1051 E. Hillsdale Blvd., Suite 510

City, State, Zip: Foster City, CA 94404

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 41

Total # of full-time company employees in California: 41

Company: A2Z Development Center Inc.

Address: 1620 26th Street

City, State, Zip: Los Angeles, CA 90404

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 12

Total # of full-time company employees worldwide: 30,000

Total # of full-time company employees in California: 5660

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Amblin Partners

Address: 100 Universal City Plaza, Building 5121

City, State, Zip: Universal City, CA 91608

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 97

Total # of full-time company employees in California: 97

Company: AireSpring

Address: 6060 Sepulveda Blvd., Suite 220

City, State, Zip: Van Nuys, CA 91411

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 180

Total # of full-time company employees in California: 132

Company: AT&T Services Inc.

Address: 3800 Via Oro Ave.

City, State, Zip: Long Beach, CA 90810

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 264,000

Total # of full-time company employees in California: 34,500

Company: ATOS IT Solutions

Address: 6904 Tujunga Ave.

City, State, Zip: N. Hollywood, CA 91605

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 120,000

Total # of full-time company employees in California: 500

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

Page 3 of 13

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: B&A Engineering Systems, Inc.

Address: 3554 Business Park Drive, Suite A1

City, State, Zip: Costa Mesa, CA 92626

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 12

Total # of full-time company employees in California: 12

Company: Boingo Wireless

Address: 10960 Wilshire Blvd., Suite 800

City, State, Zip: Los Angeles, CA 90024

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 160

Total # of full-time company employees in California: 145

Company: CBS Corporate Services

Address: 7800 Beverly Blvd. 3

City, State, Zip: Los Angeles, CA 90036

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 21

Total # of full-time company employees worldwide: 20,915

Total # of full-time company employees in California: 7,586

Company: Charter Communications

Address: 14221 Covello Street, 1st Floor

City, State, Zip: Van Nuys, CA 91405

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 92,000

Total # of full-time company employees in California: 9,673

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: CU Cooperative Systems, Inc.

Address: 9692 Haven Ave.

City, State, Zip: Rancho Cucamonga, CA 91730

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 9

Total # of full-time company employees worldwide: 750

Total # of full-time company employees in California: 425

Company: Deluxe Shared Services

Address: 2400 W. Empire Ave.

City, State, Zip: Burbank, CA 91504

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 2,366

Total # of full-time company employees in California: 2,366

Company: Digital Network Group

Address: 20382 Hermana Circle

City, State, Zip: Lake Forest, CA 92630

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 121

Total # of full-time company employees in California: 121

Company: Dimension Data Cloud Solutions, Inc.

Address: 5201 Great America PKWY

City, State, Zip: Santa Clara, CA 95054

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 28,000

Total # of full-time company employees in California: 10,000

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Direct TV

Address: 12800 Culver Blvd.

City, State, Zip: Los Angeles, CA 90066

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 30

Total # of full-time company employees worldwide: 24,700

Total # of full-time company employees in California: 10,600

Company: Dolby Laboratories Group

Address: 100 Potrero Ave.

City, State, Zip: San Francisco, CA 94103

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 1,700

Total # of full-time company employees in California: 1,050

Company: East West Bank

Address: 135 N. Los Robles, 8th Floor

City, State, Zip: Pasadena, CA 91101

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 9

Total # of full-time company employees worldwide: 2,864

Total # of full-time company employees in California: 350

Company: Engineering Employees Services

Address: 888 S. Figueroa Street

City, State, Zip: Los Angeles, CA 90017

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 95

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Excelitas Technologies Corp

Address: 1330 E. Cypress Street

City, State, Zip: Covina, CA 91724

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 4,318

Total # of full-time company employees in California: 248

Company: FremantleMedia

Address: 2900 W. Alameda Ave.

City, State, Zip: Burbank, CA 91505

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 600

Total # of full-time company employees in California: 400

Company: GMTO Corporation

Address: 465 N. Halstead Street

City, State, Zip: Pasadena, CA 91107

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 85

Company: Health Sources MSO Inc.

Address: 100 N. Stoneman Ave.

City, State, Zip: Alhambra, CA 91801

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 3

Total # of full-time company employees worldwide: 45

Total # of full-time company employees in California: 45

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: ICS, INTELESYS

Address: 3155-B E. Sedona CT.

City, State, Zip: Ontario, CA 91764

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 9

Total # of full-time company employees worldwide: 25

Total # of full-time company employees in California: 25

Company: LA Network Services

Address: 15301 Ventura Blvd.

City, State, Zip: Sherman Oaks, CA 91403

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 11

Total # of full-time company employees worldwide: 25

Total # of full-time company employees in California: 25

Company: Lanair Group, LLC

Address: 620 N. Brand Blvd., Sixth Floor

City, State, Zip: Glendale, CA 91203

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 6

Total # of full-time company employees worldwide: 39

Total # of full-time company employees in California: 28

Company: Latham & Watkins

Address: 555 West 5th Street, Suite 800

City, State, Zip: Los Angeles, CA 90013

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 7

Total # of full-time company employees worldwide: 6,000

Total # of full-time company employees in California: 2,000

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: LifeCare Assurance Company

Address: 21600 Oxnard Street, Suite 1500

City, State, Zip: Woodland Hills, CA 91367

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 11

Total # of full-time company employees worldwide: 209

Total # of full-time company employees in California: 209

Company: Media Temple

Address: 8520 National Blvd.

City, State, Zip: Culver City, CA 90232

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 7

Total # of full-time company employees worldwide: 226

Total # of full-time company employees in California: 226

Company: NBC Universal Media LLC

Address: 100 Universal City Plaza

City, State, Zip: Universal City, CA 91608

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 62,000

Total # of full-time company employees in California: 3,498

Company: Patron Solutions

Address: 5171 California Ave.

City, State, Zip: Irvine, CA 92617

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 200

Total # of full-time company employees in California: 160

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Partners in Care

Address: 732 Mott Street, Suite 150

City, State, Zip: San Fernando, CA 91340

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 7

Total # of full-time company employees worldwide: 126

Total # of full-time company employees in California: 126

Company: Preferred Long Distance

Address: 16830 Ventura Blvd., Suite 350

City, State, Zip: Encino, CA 91436

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 34

Total # of full-time company employees in California: 34

Company: Riot Games

Address: 12333 W. Olympic Blvd

City, State, Zip: Los Angeles, CA 90064

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 20

Total # of full-time company employees worldwide: 2,200

Total # of full-time company employees in California: 1,400

Company: Techital, Inc.

Address: 144 N. Glendale Blvd., Suite 301

City, State, Zip: Glendale, CA 91206

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 3

Total # of full-time company employees worldwide: 10

Total # of full-time company employees in California: 10

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Technicolor

Address: 4050 Lankershim

City, State, Zip: N. Hollywood, CA 91608

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 11

Total # of full-time company employees worldwide: 13,000

Total # of full-time company employees in California: 1,503

Company: Tech Verb

Address: 645 W. 9th Street, Suite 110-377

City, State, Zip: Los Angeles, CA 90015

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 9

Total # of full-time company employees in California: 9

Company: Teradek LLC

Address: 8 Mason

City, State, Zip: Irvine , CA 92618

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 112

Total # of full-time company employees in California: 111

Company: The S&F Management

Address: 9200 W. Sunset Blvd., 7th Floor

City, State, Zip: W. Hollywood, CA 90069

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 2

Total # of full-time company employees worldwide: 120

Total # of full-time company employees in California: 120

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Time Warner Cable

Address: 1970 E. Grand Avenue

City, State, Zip: El Segundo, CA 90245

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 18

Total # of full-time company employees worldwide: 51,600

Total # of full-time company employees in California: 18,784

Company: Turn Around Communications

Address: 1325 Pico Street, Suite 101

City, State, Zip: Corona, CA 92881

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 3

Total # of full-time company employees worldwide: 213

Total # of full-time company employees in California: 20

Company: Unitas Global

Address: 453 S. Spring Street, Suite 201

City, State, Zip: Los Angeles, CA 90013

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 50

Total # of full-time company employees in California: 40

Company: Veterinary Centers of America

Address: 12401 W. Olympic Blvd.

City, State, Zip: Los Angeles, CA 90064

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 87

Total # of full-time company employees in California: 87

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Wesco Aircraft

Address: 27727 Avenue Scott

City, State, Zip: Valencia, CA 91355

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 5

Total # of full-time company employees worldwide: 3,000

Total # of full-time company employees in California: 500

Company: Wescom Credit Union

Address: 123 S. Marengo

City, State, Zip: Pasadena, CA 91101

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 102

Total # of full-time company employees in California: 102

Company: West Coast Catalog

Address: 1605 W. Olympic Blvd., Suite 600

City, State, Zip: Los Angeles, CA 91005

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 4

Total # of full-time company employees worldwide: 2,279

Total # of full-time company employees in California: 2,279

Company: West Lake Distributors

Address: 5301 Rivergrade Road

City, State, Zip: Irwindale, CA 91706

Collective Bargaining Agreement(s):

Estimated # of employees to be retrained under this Agreement: 1

Total # of full-time company employees worldwide: 48

Total # of full-time company employees in California: 34

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Brand Consulting Group, dba Brand College

CCG No.: ET19-0210

Reference No: 18-0736

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PRINT OR TYPE IN ALPHABETICAL ORDER

Company: World Wide Technology

Address: 1165 W. Walnut Street

City, State, Zip: Compton, CA 90220

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 8

Total # of full-time company employees worldwide: 4,350

Total # of full-time company employees in California: 214

Company: Yellow Pages

Address: 611 N. Brand

City, State, Zip: Glendale, CA 91203

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 3

Total # of full-time company employees worldwide: 5,736

Total # of full-time company employees in California: 2,194



Training Proposal for:

**Inland Boatmen's Union of the Pacific
Joint Apprenticeship Committee Trust
Agreement Number: ET19-0920**

Panel Meeting of: August 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Apprenticeship	Industry Sector(s):	Goods Movement Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, San Diego, Ventura, San Luis Obispo, Santa Barbara	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Longshore Warehouse Union (ILWU)		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$246,000		\$17,040 8%		\$263,050

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Apprentice Priority Rate	Commercial Skills; HAZMAT	50	8-200	0	\$3,593	\$22.77
				Weighted Avg: 160			
2	Retrainee Journeyman Priority Rate	Commercial Skills, OSHA 10/30; HAZWOPER	100	8-200	0	\$834	\$22.77
				Weighted Avg: 30			

Minimum Wage by County: \$22.77 per hour Statewide (Priority Industry)

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

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

Up to \$7.77 per hour may be used to meet the Post-Retention Wage in Job Number 1.

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

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBER 1		
Apprentice Merchant Mariner/Seaman		50
JOB NUMBER 2		
Journeyman Merchant Mariner/Seaman		100

*Per collective bargaining agreement.

INTRODUCTION

Founded in 1918, the Inland Boatmen's Union of the Pacific Joint Apprenticeship Committee Trust (JAC) (www.ibu.org) is the marine division of the International Longshore Warehouse Union (ILWU). In Southern California, most members of the union work on tug boats that escort ships into, and out of, the Los Angeles/Long Beach harbors, fuel oil barges that fuel ships for their next voyage, and in marine construction assisting in dredge operations.

Training for Merchant Mariner/Seaman who work on the boats is rigorous and heavily regulated by the United States Coast Guard, but to date it has been difficult to attain. Employers are reluctant to hire seamen without experience and certified training. Certified training has been available only at private schools outside of Southern California at significant cost to those seeking to work as Merchant Mariner/Seaman.

The JAC and its signatory employers created a new apprenticeship program, registered with the Division of Apprenticeship Standards, to provide structured training to apprentice and journeymen Merchant Mariner/Seamen in Southern California. The apprentice program is two years in length and includes 440 hours of related and supplemental instruction.

This is a new apprenticeship program, but it follows the model of generations of successful apprenticeship programs. It is a joint labor-management program that combines on-the-job and classroom training. Apprentices earn while they learn, making progressively higher wages as they advance through the program. The first apprentices will begin training at the JAC's new training center in San Pedro this summer. This training center was created with the help of a local education agency (Los Angeles Unified School District).

Employer Demand

To stay competitive, participating employers need affordable training and a readily available, highly trained workforce that can cover combined classifications in multiple departments. Deckhand and Engineer positions have merged into one, requiring the traditional Merchant Mariner/Seaman to acquire more training, experience and skills to work safely and efficiently. This is particularly true in the inland and near coastal sectors of the maritime industry, which are affected the most by increased regulation and higher demand for workers.

Prior to the creation of this apprenticeship program, training was scattered and difficult to access. Major training sites were distant from the Long Beach and Los Angeles ports. Employees took courses, often at their own expense, but followed no comprehensive training program.

For employers, training will result in increased efficiencies in processes, increased capacity to adopt new technologies and methods, reduced turnover, and enhanced company image and better risk management. Employees gain increased skill sets and increased employability. They require less supervision and have more prospects for better pay and benefits.

Training ultimately benefits the whole maritime industry by setting higher standards regionally and nationwide. These standards, if structured consistently over time, can enhance existing regulation and trigger new regulation that benefits both the employer and the employee.

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.

To become self-sufficient, the JAC is seeking employer contributions, RSI funding, and assistance from ETP.

For this trade, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

PROJECT DETAILS

Training Plan

Commercial Skills - Training will be offered to all occupations which will cover an orientation to the nature of work, the navigational watch system, handling lines (wire and fiber rope), safe work practices, look-out training, the duties of a helmsman, anchors and anchor handling, deck machinery, mooring operation, maneuvering and handling ships and boats, propulsion and marine gear, steering orders, berthing and unberthing, heavy weather operations, shipboard fire fighting and fire prevention, maneuvering in shallow water, pollution control, emergency procedures, aids to navigation, advanced seamanship, trade mathematics, and engine room safety and operations.

Hazardous Materials (HAZMAT) – Training will be offered to Apprentice on safe handling and awareness of hazardous materials.

Certified Safety Training – Training will be offered to Journeyman.

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. 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. 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. The JAC represents that trainees will not receive 40 hours unless they work full time onsite at the clean-up location.

Impact/Outcome

Upon completion of training, apprentices and journeymen will receive industry certifications such as Able-Seaman-Limited (Merchant Mariner Credential Endorsement, Qualified Member of the Engine Dept. (Merchant Mariner Credential Endorsement), Proficiency in Survival Craft, Basic and Advanced Marine Fire-Fighting, Radar (Merchant Mariner Credential Endorsement), and Vessel Personnel with Designated Security Duties (VPDSD).

Marketing and Support Costs

Participating employers are notified of training through web sites, mailings, and presentations. These employers participate as members of the JAC and training is designed around their needs and the general needs of the industry.

To fund its staff in recruiting and qualifying additional participating employers for this program, the JAC is requesting 8% support costs. Staff will also assist with marketing, recruitment, needs

assessments and scheduling. Many participating employers have already been recruited; however, additional recruitment and assessment activities are anticipated. Staff recommends the 8% support costs.

Commitment to Training

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The JAC's Apprenticeship Director will oversee the training and internal project administration. Three staffmembers will be dedicated to marketing, recruitment, needs assessment, scheduling training, and project administration. Training will be delivered by qualified journey level workers with extensive practical and training experience at the JAC's new training facility in San Pedro.

The JAC has also retained two administration vendors who will assist with employer liaison, documenting work hours, uploading training and enrollment data, ETP reporting, and to ensure that the JAC is in compliance with ETP requirements.

Electronic Recordkeeping

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

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development of this proposal for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories and the Los Angeles Unified School District in Los Angeles will perform administrative services for a total combined fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200

Trainees may receive any of the following:

Apprentice Training

COMMERCIAL SKILLS

Able Seaman

- ✚ Orientation and nature of work
- ✚ Basic principles of watchkeeping
- ✚ Marlinspike seamanship, purchase and safe work practices
- ✚ Anchoring, mooring, and line handline
- ✚ Maneuvering and handling
- ✚ Fires, firefighting, and fire prevention
- ✚ Pollution control
- ✚ Food handler and preparation
- ✚ First aid and medical care
- ✚ Emergency procedures
- ✚ Aids to navigation
- ✚ Advanced seamanship
- ✚ Examination and assessment

Qualified Member of the Engine Department (QMED)

- ✚ Introduction to QMED oiler
- ✚ Health and safety introduction
- ✚ Trade mathematics
- ✚ Blueprint reading
- ✚ Engine systems and concepts
- ✚ Electricity
- ✚ Hydraulics
- ✚ Refrigeration and air conditioning
- ✚ Introduction to motor plants
- ✚ Introduction to steam plants
- ✚ Evaluation and assessment

Standards of Training Certification and Watchkeeping for Seafarers

- ✚ Proficiency in personal survival techniques
- ✚ Fire prevention and fire fighting
- ✚ Personal safety and social responsibility
- ✚ Elementary first aid

Proficiency in Survival Craft and Rescue Boats

- ✚ Introduction and emergency situations
- ✚ Abandon ship
- ✚ Actions to take when clear of the ship
- ✚ Actions to take when aboard a survival craft
- ✚ Radio equipment

HAZARDOUS MATERIAL (HAZMAT)

- ✚ Controlling the spread of liquids by containing the spill
- ✚ Store and label waste properly
- ✚ Identify and classify as hazardous and non-hazardous
- ✚ Material Safety Data Sheets
- ✚ Different types of hazardous materials
- ✚ Safety handling of hazardous materials
- ✚ Proper use of personal protective equipment
- ✚ Use proper containers

Journeyman Training

COMMERCIAL SKILLS

- ✚ Master of Less Than 100 GRT
- ✚ Able Seaman
- ✚ QMED
- ✚ Able Seafarers Deck Program
- ✚ Able Seafarers Engine Program
- ✚ Assistant Towing
- ✚ Proficiency in Survival Craft
- ✚ First Aid CPR/AED
- ✚ Proficiency in Survival Crafts
- ✚ Basic Safety Training
- ✚ Basic Firefighting
- ✚ Advanced Firefighting
- ✚ Tank Barge Fire Fighting
- ✚ Tankerman Barge Pic
- ✚ Security Awareness Training for All Seafarers
- ✚ Security Training for Seafarers with Designated Crowd Management
- ✚ Leadership and Team Working Skills
- ✚ Leadership and Managerial Skills
- ✚ Vessel Personnel with Designated Security Duties
- ✚ Marlinspike Seamanship
- ✚ Rigging and Signal Person
- ✚ Forklift
- ✚ Confined Space Entry

OSHA Safety (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

HAZWOPER

- Hazwoper 40

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

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



Training Proposal for:

Los Angeles & Orange Counties Air Conditioning and Refrigeration Joint Journeyman and Apprentice Training Committee

Agreement Number: ET19-0921

Panel Meeting of: August 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Apprenticeship Veterans	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, San Bernardino, Riverside, San Diego, Ventura, Santa Barbara, San Luis Obispo	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Steam-Refrigeration-Air Conditioning-Pipefitters and Apprentices of the United Association of the United States and Canada, Local Union 250		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$886,680		\$61,444 8%		\$948,124

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Apprentice Priority	Comm'l Skills, OSHA 10/30	170	8-200	0	\$4,042	\$22.77
				Weighted Avg: 180			
2	Retrainee Apprentice Priority Veteran	Comm'l Skills, OSHA 10/30	20	8-200	0	\$4,042	\$22.77
				Weighted Avg: 180			
3	Retrainee Journeyman Priority Rate	Comm'l Skills, OSHA 10/30	80	8-200	0	\$1,668	\$22.77
				Weighted Avg: 60			
4	Retrainee Priority Rate	Comm'l Skills, OSHA 10/30	28	8-200	0	\$1,668	\$22.77
				Weighted Avg: 60			

Minimum Wage by County: Job Numbers 1-4(SET/Priority Industry): \$22.77 per hour
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 Up to \$7.77 per hour may be used to meet the Post-Retention Wage in Job Number 4.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 & 2		
Apprentice HVAC Technician		190
Job Number 3		
Journeyman HVAC Technician		70
HVAC Foreman		10
Job Number 4		
Mechanical Equipment Serviceman (MES)*		20
Tradesman**		8

*The MES classification includes personnel with experience, but little to no formal training. It is an intermediate classification created through collective bargaining, with salaries and skills lower than a journeyman. Workers in this classification neither complete an apprenticeship nor receive apprentice training.

**The Tradesman classification is for entry-level helpers, drivers, parts persons, and yard workers. Tradesmen may become apprentices and advance to journeyman status. Under the collective bargaining agreement, Tradesman may be paid a \$15.00 per hour base, although they are actually paid a higher

wage according to the JJATC. Tradesman will meet the SET Priority Industry wage of \$22.77 per hour if they participate in training funded by ETP.

Both occupations were created through collective bargaining under a lower wage scale that allows the union contractors to better compete. They are represented, and their scope of work is set forth, in the collective bargaining agreement. Their total compensation includes payment into the JJATC trust fund.

INTRODUCTION

The Los Angeles & Orange Counties Air Conditioning and Refrigeration Joint Journeymen and Apprentice Training Committee (JJATC) (www.hvacr-training.com) was founded in 1949 by a consortium of labor and management organizations to provide training for air conditioning and refrigeration technicians in Southern California. The JJATC administers a training trust fund created through collective bargaining and funded by signatory employers.

This will be JJATC's fifth ETP Agreement and the fourth within the last five years. In this proposal, training will continue for apprentices, journeymen, and workers in special "helper" classifications. Training includes inspection, service, maintenance, start-up, testing, balancing, adjusting, repair modification and replacement of mechanical and refrigeration equipment. These workers are represented by the Steam-Refrigeration-Air Conditioning-Pipefitters and Apprentices of the United Association of the United States and Canada, Local Union 250. Trainees work for contractors who serve a wide variety of industrial and commercial businesses throughout Southern California.

Employer Demand

The Air Conditioning & Refrigeration Contractors Association of Southern California represents employers in this project. Employer demand continues to be strong for experienced workers and new apprentices to install and maintain complex electronically-controlled equipment, and to meet new building standards for energy efficiency. Trainees work for contractors who serve a wide variety of industrial and commercial businesses throughout Southern California.

Energy efficiency regulations are changing the industry, especially in California. The California Building Energy Efficiency Standards, also known as Title 24, require higher levels of efficiency from air conditioning and refrigeration systems. This includes new types of equipment and controls (i.e. setting up zones so only occupied portions of a building are cooled). Title 24 also sets standards for commercial refrigeration including supermarkets. These standards are part of California's response to AB 32, the Global Warming Solutions Act of 2006, which mandates that California reduce its greenhouse gas emissions to 1990 levels by 2020.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the program is five years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

Veterans Program

In this proposal, the JJATC will train 10 Veterans (Job Number 2). These trainees are in a separate Job Number to better track performance toward the goal of improved outreach for Veterans. Veterans who apply for an apprenticeship receive direct entry into the program, which includes training and assistance in finding work with employers throughout the area at no cost to them. JJATC is committed to supporting job-related training that helps Veterans transition into the California workforce.

PROJECT DETAILS

Training Plan

Training will help workers learn to install, troubleshoot and repair air conditioning and refrigeration components and systems. Training will include instruction in the use of electrical controls, digital controls, and new equipment. In-depth training in the principles of air conditioning and refrigeration will be provided, including thermodynamics, energy efficiency rating and coefficient of performance calculations. Specialized training will be provided for workers who install and service supermarket refrigeration systems. Training will include how to select components and lay out systems for maximum efficiency. Training will also include how to communicate effectively with customers and describe energy systems, efficiency requirements and savings from more efficient systems.

Commercial Skills: Training will be offered to all occupations on installation, troubleshooting and repairing air conditioning and refrigeration components and systems. Training will include instruction in the use of electrical controls, digital controls, and new equipment. In-depth training in the principles of air conditioning and refrigeration, including thermodynamics, energy efficiency rating and coefficient of performance calculations, will also be provided. Workers who install and service supermarket refrigeration systems will receive specialized training.

OSHA 10/30: Training is a series of courses "bundled" by industry sector and occupation. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. This training provides a complete overview of occupational safety and health so that workers are more knowledgeable about workplace hazards and understand their rights as workers. Equipment and materials not used correctly can also lead to injuries for the worker and puts other people in the area in potential danger.

Curriculum Development

The curriculum was developed and customized by a joint labor-management committee comprised of employer and union representatives to address the demands driven by new building standards for energy efficiency. The committee also continuously reviews and updates curriculum, training materials, and training facilities based upon the industry expertise of its membership.

The JJATC conducts assessments at the conclusion of each training session to evaluate program effectiveness. Trainees and employers are encouraged to provide feedback through their representatives on the Committee and directly to training personnel at the JJATC.

Impact/Outcome

Apprentices will be certified as Journeymen once they complete the entire apprentice curriculum. Journeymen will receive an industry certificate for completing the HVAC core course and an Energy Auditor certificate for completing the energy auditing course.

Marketing and Support Costs

Participating employers are notified of training through the Air Conditioning, Refrigeration and Mechanical Contractors Association of Southern California via websites, mailings and presentations. Workers are notified of training through their union local and directly by the training center through website postings and mailings.

The JJATC 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

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen. Safety training is provided by the participating employers in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The JJATC's Director of Training will oversee the training and internal project administration. The JJATC has retained two administration vendors to assist with administrative tasks. In-house staff will handle class scheduling and completion of training rosters. Training will be delivered by experienced journeyman workers in the trade at the JJATC's training facilities in Los Angeles, Bakersfield, San Luis Obispo and San Diego.

Electronic Recordkeeping

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

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0908	\$601,060	09/24/16 – 09/23/18	310	342	342

Based on the ETP Online Tracking System, JJATC's projected earnings is \$560,501 (93% based on the total reimbursable hours of 35,581 entered online.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned	
				\$	%
ET15-0921	Los Angeles	03/02/15 - 03/01/17	\$299,827	\$299,827	(100%)
ET14-0905	Los Angeles	11/16/13– 11/15/15	\$443,690	\$443,690	(100%)
ET13-0902	Los Angeles	09/01/12– 08/31/14	\$415,381	\$415,381	(100%)

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories and the Los Angeles Unified School District in Los Angeles will perform administrative services for a combined fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

COMMERCIAL SKILLS**Apprentice Training**

- ✚ Air Conditioning HVAC Troubleshooting V
- ✚ Air Conditioning: Market Systems for HVAC
- ✚ Compressors III
- ✚ Customer Relations II
- ✚ DDC III
- ✚ Electrical Controls II
- ✚ Electrical Controls III
- ✚ Heat Loads & Air Distribution IV
- ✚ HVAC Start Test Balance V
- ✚ HVAC Systems IV
- ✚ Hydronic Troubleshooting V
- ✚ Installation II
- ✚ Market Applications IV
- ✚ Pneumatics IV
- ✚ Safety
- ✚ Thermodynamics
- ✚ Variable Frequency Drives V
- ✚ Water Chillers V

Journeyman Training

- ✚ Absorption Chillers
- ✚ Belimo Motors
- ✚ Centrifugal
- ✚ Combustion Analysis
- ✚ Compressors
- ✚ Customer Relations
- ✚ DDC
- ✚ ECM Motors
- ✚ Electrical Code
- ✚ Electrical Controls
- ✚ Electrical for Start
- ✚ Electrical Protocol
- ✚ Electronic Variable Speed Drives
- ✚ Energy
- ✚ Energy Retrofit
- ✚ Evap. Cond/Cooling Towers
- ✚ Green Professional Building Skills
- ✚ GreenChill
- ✚ HVAC Core
- ✚ Market Core

- ✦ Market EMS E-2/Control
- ✦ Mechanical Code
- ✦ Standards of the National Environmental Balancing Bureau
- ✦ Pneumatics
- ✦ Project Management
- ✦ Refrigerant Piping
- ✦ Screw Chillers
- ✦ Solar
- ✦ Thermal Energy Storage
- ✦ Title
- ✦ Vane Axial
- ✦ Variable Air Volume Systems

MES and Tradesman Training

- ✦ Electrical
- ✦ Mechanical
- ✦ Brazing & Soldering
- ✦ Package Systems
- ✦ Advanced Troubleshooting Techniques
- ✦ Refrigerant Controls
- ✦ Electrical Controls

OSHA 10/30 (Certified OSHA Instructor)

- ✦ OSHA 10
- ✦ OSHA 30

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

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



Training Proposal for:

**Southern California Floor Covering Crafts Joint
Apprenticeship and Training Committee**

Agreement Number: ET19-0919

Panel Meeting of: August 24, 2018

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

PROJECT PROFILE

Contract Attributes:	Apprenticeship Retrainee Priority Rate	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Southern California Resilient Floor & Decorative Covering Local Union 1247		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$328,050		\$22,780 8%		\$350,830

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Apprentice	Business Skills, Commercial Skills, OSHA 10/30	110	8-210	0	\$2,583	\$22.77
				Weighted Avg: 115			
2	Retrainee Journeyman Priority Rate	Business Skills, Commercial Skills, OSHA 10/30	100	8-200	0	\$667	\$22.77
				Weighted Avg: 24			

Minimum Wage by County: SET/Priority Industry: \$22.77 per hour.

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

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

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

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 - Apprentice Floor Coverer		110
Job Number 2 - Journeymen Floor Coverer		100

INTRODUCTION

Southern California Floor Covering Crafts Joint Apprenticeship Training Committee (So Cal Floor) (www.dc36.org) is responsible for training approximately 200 apprentices and 320 journeymen. So Cal Floor was founded in 1953, pursuant to the collective bargaining agreement between Carpet, Linoleum, and Soft Tile Local Union 1247 (of the Brotherhood of Painters, Decorators and Paperhangers of America) and the Floor Covering Contractors Association of Orange County, Harbor Floor Covering Institute, and San Gabriel Valley Floor Covering. This will be So Cal Floor Cover's fifth ETP Agreement.

So Cal Floor is a non-profit training organization dedicated to providing members with better job opportunities, up-to-date industry skills and secure employment for its members. It is a joint labor-management committee representing the floor covering industry throughout Southern California, administered by a Board of Trustees made up of four labor and four management members.

So Cal Floor's headquarters and training center are located in Santa Fe Springs. The JATC serves both large and small companies and workers in Los Angeles, Orange, Kern, Inyo, Mono, Riverside, San Bernardino, Ventura, Santa Barbara and San Luis Obispo Counties. All trainees are represented by Local 1247.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the program is four years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

PROJECT DETAILS

The number of apprentices needed by the industry has nearly doubled in two years from 110 to 200. Without sufficient training for the new workforce, employers will be unable to bid for and perform all available work.

Training under this proposal is similar to those in the previous ETP Agreements; however, with new products and materials being introduced into the industry, there is a need for new training. So Cal Floor has continued to expand its training programs, adding new curriculum topics that will meet employer needs.

Trainees must be able to install and maintain a wide variety of flooring materials and systems developed and sold by a variety of competing manufacturers. Major manufacturers now require apprentices and journey level workers to be trained and certified in the use of their products before they can work on those products. In addition, manufacturers are pushing the cost of warranty work to installation contractors, requiring workers to be more skilled in an effort to avoid the extra expense of warranty work.

Particular changes that require training include: new glues and adhesives for attaching flooring material, special products sold by major manufacturers, heat welds for different products, rollups on the cove, trowel usage, and recognizing correct drying times.

Training Plan

Commercial Skills - Training will be offered to all occupations and include new installation techniques for various floor coverings including Linoleum, Laminates, Vinyl-Backed Carpet, Tiles, and Sheet Goods. The program will also offer Advanced Carpet Installation, Hard Surface Installation Testing, Carpet Installation Testing, Synthetic Turf, Heat Welding, and Trade Math. In addition, Armstrong Certification Training will cover work with new water-based adhesives, which completely alters the installation process.

OSHA 10/30 – OSHA 10/30 training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours and/or 30 hours of training for apprentices and journey level

workers and frontline supervisors. Completion of the training results in a certificate that expands employment opportunities. Many employers are now requiring these classes before workers are allowed onto a worksite. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA. OSHA 10/30 is not included in the 10% limitation on safety training.

LMS

Staff has reviewed and approved So Cal Floor's use of a Learning Management System for recordkeeping.

Commitment to Training

Employers will continue to make contributions to the training trust for every hour worked by Apprentices and Journeymen.

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

➤ Training Infrastructure

So Cal Floor's Training Director, along with four employees, will work together to schedule all training sessions and collect training data. Steve Duscha Advisories and the Los Angeles Unified School District have also been retained to assist with administration.

Training Coordinator/Qualifications

So Cal Floor instructors are current or former floor covering installers who are experts in the subject-matters they teach. Classes are equipped with materials, equipment and tools for training with a strong emphasis placed on the use of tools, material application and safety. All trainers are certified by Hacienda La Puente Unified School District.

Curriculum Development

The curriculum was developed by So Cal Floor with input from both union and employer representatives. It has been customized to address the needs of its members, participating employers, and the industry. Feedback comes directly from employer and union representatives based on workplace performance and student course evaluations.

Marketing and Support Costs

Employers are notified of So Cal Floor's training through association websites, mailings, and presentations conducted throughout Southern California. It also promotes training at labor-management meetings and industry assemblies. Application announcements for union apprentice programs are sent to government agencies as well as to local high schools, community colleges, and community-based classes.

So Cal Floor is requesting 8% support costs to market journeyman training to employers, to recruit and place apprentices, and to conduct ongoing assessments of employer-specific job requirements. While many participating employers are on board, outreach activities will also be ongoing. Staff recommends the 8% support costs.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by So Cal Floor under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0909	\$229,840	09/26/16– 09/25/18	260	137	117

Based on ETP Systems, 17,818 reimbursable hours have been entered into online tracking, sufficient to support earnings of \$229,840 (100%). The Contractor completed retention on June 25, 2018.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0910	Santa Fe Springs	09/02/2014– 09/01/2016	\$196,972	\$196,972 (100%)
ET13-0900	Santa Fe Springs	10/08/2012– 10/07/2014	\$302,547	\$201,521 (67%)*

**ET13-0900: Performance was lower than expected due to overly ambitious training hours.*

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories and the Los Angeles Unified School District in Los Angeles will perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

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

8-210 Job Number 1

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Tools and processes
- Workplace procedures
- Load and unload
- Surface preparation
- Wall base
- Free hand flat lay
- Scribe fit flat lay
- Carpet seaming
- Tools and processes
- Workplace procedures
- Blueprint reading
- Underlayment
- Resilient sheet goods
- Glue down carpet
- Peel and stick carpet
- Conventional carpet
- Yardage
- Vinyl back carpet and composite tile
- Cove Sheet Goods
- Glue Down Borders
- Sheet Vinyl Seaming Techniques
- Hand sewing Linoleum sheet installation
- Foreman training
- Self-leveling
- Heat seam welding
- Carpet stair installation
- Rubber Flooring Products
- Hand Sewing
- Conventional Carpet
- Glue-Down Carpet
- Carpet Stair Installation
- Conventional Borders
- Carpet Banding
- Skirts, Treads, and Risers
- Vinyl Composition Tile
- Linoleum Installation
- Self-Leveling

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

Journeyman**Class/Lab Hours**

8-200 Job Number 2

Trainees may receive any of the following

COMMERCIAL SKILLS

- Advanced Carpet Installation
- Advanced Installation (other than carpet, by product & location)
- Armstrong Certification
- Carpet Installation Testing
- Forbo
- Glues and adhesives
- Green Floor Covering Installation
- Hard Surface Installation Testing
- Heat Welding
- Laminates
- Linoleum Installation Training
- Materials review
- Mondo Rubber
- Nora Rubber
- Self-Leveling
- Sheet Goods Installation
- Synthetic Turf
- Tandus Centiva
- Tarkett
- Tools review
- Trade Math
- Types of flooring
- Understanding customer needs
- Vinyl Backed Carpet Installation

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

Note: Reimbursement is capped at 210 total training hours per trainee in Job Number 1 and 200 total hours per trainee in Job Number 2, regardless of the method of delivery.



Training Proposal for:
**Southern California Sheet Metal Joint Apprenticeship and
 Training Committee**

Agreement Number: ET19-0918

Panel Meeting of: August 24, 2018

ETP Regional Office: North Hollywood

Analyst: M. Webb

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Apprenticeship Veterans	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, San Bernardino, Riverside, Inyo, Mono, Kern	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Association of Sheet Metal, Air, Rail, and Transportation Workers, Local 105		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$887,040		\$61,440 8%		\$948,480
In-Kind Contribution:	50% of Total ETP Funding Required			Inherent

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Apprentice Priority	Commercial Skills, OSHA 10/30	359	8-200	0	\$2,470	\$22.77
				Weighted Avg: 110			
2	Retrainee Apprentice Veterans Priority	Commercial Skills, OSHA 10/30	25	8-200	0	\$2,470	\$22.77
				Weighted Avg: 110			

Minimum Wage by County: SET/Priority Industry: \$22.77 per hour

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

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

Up to \$2.84 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Apprentice Sheet Metal Worker		359
Job Number 2		
Veteran Apprentice Sheet Metal Worker		25

INTRODUCTION

Formed in 2003, the Southern California Sheet Metal Joint Apprenticeship and Training Committee Training Center (SoCal Sheet Metal JATC) provides training for Apprentice and Journey sheet metal workers for seven Southern California counties. In the past, two different apprenticeship committees served the Southern California Region (Sheet Metal Workers International Association, Local 105 JATC and Air Conditioning Sheet Metal Association, Orange Empire JATC). After 2007, these committees were consolidated into one. Signatory employers are represented on the Committee through the Sheet Metal and Air Conditioning Contractors National Association (SMACNA) and Sheet Metal, Air, Rail, Train International Association (SMART). This will be the fifth ETP Agreement with SoCal Sheet metal JATC.

The JATC currently trains 770 Apprentices and 3,400 Journeymen. Apprentice training takes place every other week for eight hours. Once training is completed, trainees begin employment in the industrial and commercial industries in the Southern California region. This is the sixth ETP Agreement with SoCal Sheet Metal JATC.

Veterans Program

The Panel has established a higher reimbursement rate and other incentives for training California veterans. Higher support costs are also available to reach participants for this program. SoCal Sheet Metal JATC has committed to train 25 Veterans (Job Number 2). The JATC works with Helmets-to-Hardhats, and other Veterans programs for recruitment.

PROJECT DETAILS

Sheet Metal contractors provide construction services that include design, fabrication, installation, service and repair work of any metal that can be formed from flat pieces of varying thickness. Apprentices will receive training to ensure they can utilize specialized tools to cut, roll, bend, and shape metal for objects/products such as ductwork, airplane wings, car bodies, refrigeration units, medical tables, storage units, building facades, tubing, and signs. In addition, workers will also learn to use computer-aided drafting tools to produce detailed 2D and 3D drawings of building systems.

SoCal Sheet Metal JATC training programs provide specialized training in servicing HVAC and commercial refrigeration systems, sign companies, and industrial welding. Additional training will include installation, maintenance, testing, adjusting and balancing, and energy management. Training will begin September 1, 2018 and end approximately 18 months later.

Training Plan

Training provided will help workers adapt to the following significant changes in the industry: 1) Growing customer demand for an increase in sheet metal workers 2) New 3D technology and other computerized software programs utilized in construction planning 3) A growing demand for energy efficiency, green technology, and reduction of waste accumulation in the construction process. 4) Climate change (Assembly Bill 32 & The Global Warming Solutions Act of 2006) 5) The need for sheet metal workers to perform an increased amount of work/skills with smaller teams and 6) A need for more safety courses to improve prevention, and lower the number of injuries caused on-the-job.

Commercial Skills: Training will be offered to all occupations to introduce Apprentice trainees to the trade of sheet metal. Commercial Skills training will teach workers basic and specialized skill sets that will be used in the commercial, industrial, and construction industries.

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.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case the program is five years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-

consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

Commitment to Training

Employers will continue to make contributions to the training trust for every hour worked by apprentices. Safety training is, and will continue to be, provided by the JATC in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Administration will be performed in partnership with SoCal Sheet Metal, the Los Angeles Unified School District (LAUSD), and Steve Duscha Adversaries. Class scheduling and training documentation will be managed by SoCal Sheet Metal Administrative Staff located at the Industry Center. LAUSD and Mr. Duscha will assist with administrative tasks.

Learning Management System

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

Marketing and Support Costs

Employers are notified of training through associations such as the Sheet Metal and Air Conditioning Contractors' National Association, the Los Angeles and the Orange Empire Sheet Metal and Air Conditioning Contractors' National Association. Notifications are made via websites, mailings, and presentations. Workers are also notified of training through their local unions and directly by the training center online and mailings. Recruitment will continue to ensue throughout the duration of this Agreement. As a result, SoCal Sheet Metal requests 8% in support costs to manage and continue recruitment efforts under this proposal.

Trainer Qualifications/Coordinator

Experienced journey-level workers in the sheet metal trade will provide all training under this Agreement. All trainers are employed by SoCal Sheet Metal JATC and have the knowledge and skills required to deliver sheet metal training topics.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by SoCal Sheet Metal JATC under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET18-0902	\$949,690	07/01/17-06/30/19	49	379	TBD

Based on ETP Systems, 56,144 reimbursable hours have been tracked for potential earnings of \$780,040 (82% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through August 2018.

PRIOR PROJECTS

The following table summarizes performance by SoCal Sheet Metal JATC under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0923	City of Industry	05/27/16-05/26/18	\$885,400	\$853,753 (96%)*
ET15-0925	City of Industry	04/01/15-03/31/17	\$448,448	\$448,448 (100%)
ET14-0906	City of Industry	11/16/13-11/15/15	\$448,448	\$448,448 (100%)
ET13-0911	City of Industry	10/22/12-10/21/14	\$298,936	\$298,936 (100%)

*ET16-0923: \$708,529 has been approved by ETP Fiscal. An additional amount of \$145,224 is still in the review process and on track for approval by ETP Fiscal Unit. As a result, final earnings for this Agreement will total an estimated \$853,753.

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories and the Los Angeles Unified School District in Los Angeles will perform administrative services for a combined fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

COMMERCIAL SKILLS**Course Two****A. INTRODUCTION**

Know the trends and future of the sheet metal trade

- Review class expectations
- Review class rules
- Discuss the current state of the sheet metal trade
- Discuss the different types of apprenticeship organizations
- Discuss the industry standards for employment
- Discuss wage scales for the trade
- Discuss the importance of organization and time management
- Discuss the procedures for equipment care
- Discuss the role of computers in the sheet metal trade

B. WORKPLACE SAFETY

Learn workplace safety rules and procedures

- Identify the standard shop procedures
- Discuss shop safety rules and regulations
- Discuss procedures for the safe handling of asbestos
- Discuss shop safety as it applies to the use of tools and equipment
- Demonstrate the ability to use tools and equipment safely
- Discuss safety practices in field installations
- Discuss shop procedures for fire and earthquake safety
- Pass the safety test with 100% accuracy

C. TRADE MATHEMATICS – PART 2

Understand the steps in solving various trade mathematical problems

- Describe how mathematics is used in the sheet metal trade
- Demonstrate the ability to use a calculator
- Solve various decimal and fractional problems using a calculator
- Demonstrate the ability to solve equations
- Describe how trigonometry is used in the sheet metal trade
- Solve various trigonometric problems

D. DRAFTING AND SKETCHING – PART 2

Know how to draw and interpret basic sheet metal drawings and sketches

- Review fundamentals of drafting and sketching
- Describe a pictorial drawing
- Draw square and rectangular fittings
- Sketch moldings
- Draw ellipses
- Lay out and draw an octagon

- Interpret shop sketches and drawings
- Demonstrate the ability to sketch free hand

E. LAYOUT AND PATTERN DEVELOPMENT – PART 2

Learn how to lay out patterns for the fabrication of ducts

- Describe off-center round tees
- Lay out a round elbow
- Describe radial lines
- Fabricate a roof jack
- Fabricate offset round tapered ducts using triangulation
- Layout and fabricate a transition
- Describe a duct change elbow
- Demonstrate the ability to lay out change and drop “S” offsets
- Explain applicable formulas for fabrication of ducts

F. READING PLANS AND SPECIFICATIONS – PART 1

Understand the basics of reading and interpreting symbols, specifications and plans

- Discuss the importance of specifications
- Identify the symbols commonly used in plan reading
- Identify the abbreviations commonly used in plan reading
- Identify the different details commonly used in plan reading
- Identify the different parts of a set of plans
- Interpret a set of plans

G. MATERIALS – PART 2

Know the sources, types, and methods used for the materials in sheet metal work

- Review the sources and uses of steel
- Review the different types of sheet metal
- Review the U.S. standard gauges of sheet metal
- Review the different metal products used in sheet metal work
- Demonstrate the ability to use various sheet metal fasteners
- Describe various forming methods used in sheet metal work
- Differentiate among various types of sheet metal

H. INDUSTRIAL SPECIALTIES – PART 2

Learn the different materials and special handling systems used in the sheet metal trade

- Differentiate among various materials used in sheet metal work
- List various material handling systems
- Analyze various material handling systems

I. SHOP WORK – PART 2

Understand the fabrication of sheet metal projects to predetermined specifications

- Review basic shop fabrication procedures
- Discuss use of the standard sheet metal hand bending hand brake
- Demonstrate use of box and pan brakes
- Describe use of the rotary combination machines
- Demonstrate the ability to use squaring and throatless shears
- Demonstrate the use of bar folders and slip rollers
- Describe how to fabricate a round tee

J. FIELD INSTALLATION – PART 2

Know the installation techniques for fabricated products in “on-the-job” situations

- Review the basics of field installation
- Describe various duct clearances in field installation
- Describe the placement of hangers
- Demonstrate duct preparation
- Describe duct erection
- Know how to evaluate a job upon completion

K. SERVICE WORK – PART 2

Learn to deliver effective service work through accurate evaluation

- Evaluate a typical work order and job layout
- Describe heating, ventilation, and air conditioning control systems
- Describe servicing of heating, ventilation, and air conditioning systems
- Evaluate materials used in servicing
- Interpret job specifications for servicing
- Evaluate control systems on furnaces
- Evaluate control systems on air conditioning units

L. ARCHITECTURAL SHEET METAL – PART 2

Understand the function of a structure and the overall relationship of sheet metal to architectural design

- Describe various architectural sheet metal materials
- Describe the differences in architectural sheet metal seams
- Describe the installation of gutters and conductor pipe
- Discuss the use of flashing and cornices
- Discuss the evaluation procedures for sheet metal siding, roofing, and decking
- Discuss the evaluation procedures of the different types of ventilators

M. HEATING, VENTILATION, AND AIR CONDITIONING (HVAC) SYSTEMS – PART 2

Know the specific features and functions of the heating, ventilation, and air conditioning systems

- Describe air movement in ducts
- Differentiate among various duct types
- Describe the operation of central heating, ventilation, and air conditioning systems
- Discuss different duct systems

N. TESTING AND BALANCING – PART 1

Learn testing and balancing of heating, ventilation, and air conditioning systems

- Describe normal design conditions for summer and winter
- Discuss basics of testing and balancing
- Demonstrate how to test and balance a system

O. ENERGY CONSERVATION

Understand the principle of energy conservation

- Define energy management
- Discuss the economic impact of energy management on a business organization
- Discuss the environmental impact of energy management on a business organization
- Describe typical ways in which energy is wasted
- Describe typical ways in which energy is saved

Course 3**A. WORKPLACE SAFETY**

Know the welding safety rules and procedures as they pertain to the sheet metal trades

- Discuss shop safety rules and regulations
- Discuss shop procedures for fire and earthquake safety
- Discuss shop safety as it applies to the use of tools and equipment
- Use tools and equipment safely
- Pass the designated safety exam with 100% accuracy

B. WELDING METALLURGY

Learn and interpret types of steel and properties of metal

- Describe types of steel and their manufacturing processes
- Identify properties of metal
- Identify laws of expansion, contraction, and distortion
- Describe filler materials
- Explain reason for preheating and post-heating
- Describe methods and processes of welding the following: a. carbon steel; b. alloy steel

C. WELDING EQUIPMENT AND PROCESSES S

Understand the processes involved in using the following equipment

- Describe the processes involved in using the oxy-acetylene welding apparatus
- Describe the processes involved in using the arc welding machine
- Describe the processes involved in using the TIG welding machine
- Describe the processes involved in using the MIG welding machine
- Describe the processes involved in using the gas metal arc welder

D. WELDING TOOLS AND EQUIPMENT

Know the proper use of shop equipment

Define regulations in the welding field

- Describe the use and efficiency of the various types of AC and DC power supplies
- Classify the various types of electrodes
- Identify the types of gases according to the following: cylinder identifications, use on specific metals, use on specific jobs
- Identify the types of torches and tips
- Perform inspection and maintenance procedures

E. WELDING SYMBOLS AND NOMENCLATURE

Learn the symbols and nomenclature commonly used in welding

- Describe standard welding symbols
- Describe nomenclature for the welding trade

F. SURFACE WELDS

Understand the application of surface welds

- Weld fusion beads with and without filler metal
- Perform butt welds with filler metal
- Perform fillet welds in lap and tee joints
- Demonstrate corner welds with and without filler metal

G. FILLET WELDS: ALL POSITIONS

Know all positions of fillet welds

- Apply torch manipulation techniques
- Inspect metal for weld defects
- Perform welding sequences
- Compute measurements
- Perform welds for joint design
- Demonstrate welds for pipe-to-plate
- Demonstrate fillet soundness

H. GROOVE WELDS

- Learn the different types of groove welds
- Identify the various types of groove welds
- Perform the following types of groove welds: corner, single vee with back up, single vee open, single level with back up, single level open, double vee and double level, pipe 2-G, 5-G and 6-G

I. OXYACETYLENE CUTTING (BURNING)

Understand the principles and procedures in oxyacetylene cutting

- Describe principles of oxyacetylene cutting
- Describe characteristics of acetylene
- Describe characteristics of oxygen
- Demonstrate proper care of cylinders and regulators
- Identify oxyacetylene cutting equipment
- Assemble oxyacetylene cutting equipment
- Know how to correctly and safely adjust oxyacetylene cutting equipment
- Demonstrate correct tip cleaning procedures
- Perform flame adjustment for cutting
- Demonstrate skill in the following: burning slits, scarfing, piercing holes
- 1 Demonstrate free-hand cutting
- 1 Know how to set up and use a radiograph (sidecutter)
- 1 Demonstrate beveling a 30-degree bevel on 3/8 inch plate
- 1 Demonstrate beveling a 22 1/2-degree bevel on 1-inch plate
- 1 Demonstrate proper use of scarfing tips
- 1 Identify various fuel gases

J. AIR CARBON ARC PROCESS

Know the air carbon arc process

- Describe procedures and safety precautions
- Identify air supply
- Identify use of arc electrode holder
- Identify electrodes used
- Describe and use air carbon arc cutting equipment
- Describe and use carbon electrode arc cutting equipment
- Perform oxygen arc cutting
- Perform metal electrode arc cutting
- Perform air metallic arc cutting

K. BRAZING STEEL AND CAST IRON

Learn brazing on various surfaces

- Braze the following joints: sheet metal, butt, lap, tee
- Perform brazing on tubing in the following positions: butt, horizontal, vertical, overhead
- Demonstrate cast iron vee groove brazing
- Perform brazing on tubing tee joints in all positions

L. WELDING EVALUATION

Understand the competencies needed to pass the City of Los Angeles Departmental Welding Exam

- Answer and interpret correctly items on the written examinations
- Participate in manipulative skills tests
- Cooperate in observations and critiques
- Participate in classroom activities
- Prepare for the City of Los Angeles Departmental Exam

M. READING PLANS AND SPECIFICATIONS – PART 2

Know the proper ways to read and interpret architectural and structural drawings, and to draw mechanical and electrical plans

- Review the importance of specifications
- Review the symbols commonly used in plan reading
- Review the abbreviations commonly used in plan reading
- Review the different details commonly used in plan reading
- Review the different parts of a set of plans
- Interpret a set of plans
- Interpret architectural drawings
- Interpret structural drawings
- Draw mechanical drawings
- Draw electrical drawings

Course 4**A. INTRODUCTION**

Review the trends and future of the sheet metal trade

- Review class expectations
- Review class rules
- Review the standard shop procedures
- Review the importance of craftsmanship
- Review the history of apprenticeship programs
- Review the history of sheet metal
- Review the possible future uses for sheet metal
- Review mathematical computations relevant to the sheet metal trade
- Solve various practical math problems

B. WORKPLACE SAFETY REVIEW

Review workplace safety rules and procedures

- Review shop safety rules and regulations
- Review shop procedures for fire and earthquake safety
- Review shop safety as it applies to the use of tools and equipment
- Use tools and equipment safely
- Pass the designated safety exam with 100% accuracy

C. DRAFTING AND SKETCHING – PART 3

Learn the basics of drafting and sketching installation plans for heating and air conditioning systems

- Review fundamentals of drafting and sketching
- Interpret basic sheet metal drawings
- Identify symbols and abbreviations used in heating and air conditioning plans
- Draw installation plans for a heating and air conditioning system

D. LAYOUT AND PATTERN DEVELOPMENT – PART 3

Know how to layout pattern for individual fittings

- Review the principles of pattern development
- Discuss the use of off-center tapers in metal fabrication
- Discuss the fabrication of various types of miters
- Identify round tapers on a pitch
- Discuss the use of round tapers on a pitch
- Identify a square to round transition on a pitch
- Discuss the use of a two-way switch

E. READING PLANS AND SPECIFICATIONS – PART 3

Learn the accurate reading and interpretation of architectural and structural drawing, and practice drawing mechanical and electrical plans

- Review the importance of specifications
- Review the proper way of interpreting architectural drawings
- Review the proper ways of interpreting structural drawings
- Draw several mechanical drawings
- Draw several electrical drawings

F. MATERIALS – PART 3

Learn the characteristics and functions of stainless steel, aluminum, copper, and other forms of sheet metal

- Discuss the characteristics of stainless steel used in sheet metal work
- Discuss characteristics of aluminum used in sheet metal work
- Discuss the characteristics of copper used in metal sheet work
- Differentiate the uses of stainless steel, aluminum, and copper in sheet metal work

G. INDUSTRIAL SPECIALTIES – PART 3

Understand the various types and applications of industrial specialties in the sheet metal trade

- Describe lagging
- List examples of where lagging is used
- Describe various materials used in pipe lagging
- Describe the use of polyvinyl chloride (PVC) in sheet metal work
- Work with PVC
- Describe the use of fibrous glass duct board
- Work with fibrous glass duct board
- Describe the use of fiber-reinforced plastic
- Work with fiber-reinforced plastic

H. SHOP WORK – PART 3

Understand the functions and operation of special sheet metal power equipment

- Review basic shop fabrication procedures
- Operate power-squaring shears
- Operate a press brake
- Operate roll-forming machines

I. HEATING, VENTILATION, AND AIR CONDITIONING SYSTEMS – PART 3

Know the processes, units, and devices used to condition the air

- Describe air movement in ducts
- Differentiate among installation of different types of package units
- Evaluate the different types of terminal devices
- Discuss the different types of generators and motors used in heating and air conditioning systems

J. FIELD INSTALLATION – PART 3

Understand the installation techniques for the HVAC systems

- Differentiate between a smoke damper and a fire damper
- Analyze various installations of central heating and air conditioning systems
- Discuss advantages of roof top package unit installations

K. SERVICE WORK – PART 3

Understand the start-up, testing, and balancing processes for residential and light commercial heating and air conditioning systems

- Describe the start-up process for residential and light commercial heating and air conditioning systems
- Prepare components for testing and balancing
- Describe instruments used in balancing a system
- Test and balance a heating and air conditioning system

L. ARCHITECTURAL SHEET METAL – PART 3

Understand the installation techniques for batten seam roofs, coping, fascia, gravel stops, flashing, and counter-flashing, and the fabrication of cornices and louvers

- Install batten seam roofs
- Install coping, fascia, and gravel stops
- Install flashing and counter-flashing
- Discuss fabrication of cornices
- Fabricate and install louvers

M. ELECTRONIC AND COMPUTERIZED CONTROLS – PART 1

Understand the basic principles and functions of electronic components and controls in heating, ventilation, and air conditioning systems

- Define electricity
- Define current
- Define conductor
- Define resistance
- Define voltage
- Solve Ohm's Law problems
- Compare alternating current (AC) to direct current (DC)
- Identify electrical circuits and their components

- Describe magnetism
- Describe how electricity can be generated
- 1Describe the function of fuses and circuit breakers
- 1Describe the action of the following electromechanical devices: fans, motors, monitors, controls
- 1Describe basic controls used in heating and air conditioning systems
- 1Describe the use of pneumatic controls in heating and air conditioning systems

N. BLOWPIPE SYSTEM – PART 1

Know the basics of blowpipe construction and special fittings

- Describe a complete blowpipe system
- Describe a closed system
- Describe a heat recovery system
- Describe a cyclone material separator
- Describe how various parts of a system contribute to the total operation
- Describe a baghouse
- Explain how a baghouse works

O. FOOD SERVICE AND BEVERAGE DISPENSING EQUIPMENT – PART 1

Learn how sheet metals are used in food service and dispensing equipment

- Describe food service equipment that uses sheet metal
- Describe various jobs a sheet metal worker might encounter in servicing food service equipment
- Differentiate among food service sheet metal work and other types of sheet metal work

P. ASBESTOS

Know about asbestos and its health hazards

- Describe places asbestos might be found at a work site
- Discuss how to identify asbestos
- Describe the hazards of working with asbestos
- Describe how to handle asbestos when found in retrofit work

Course 5

A. PROFESSIONAL GROWTH

Know the importance of professional growth

- Explain the necessity to continue learning about the trade
- List several ways to continue learning about the trade

B. ADVANCED TRADE MATHEMATICS

Learn the uses of advanced mathematics in the sheet metal trade

- Use trigonometry and other areas of mathematics to solve practical trade problems
- Explain how to break down difficult problems into small steps
- Use all the features of THE International Training Institute (ITI) calculator

C. DRAFTING AND SKETCHING – PART 4

Understand drafting, sketching, and the computer-assisted drafting (CAD) system

- Use applied shop drawing skills to make a simple shop drawing
- Explain the uses and advantages of a CAD system

- Describe the basic elements of CAD system
- Perform field measurements of ducts and fittings

D. LAYOUT AND PATTERN DEVELOPMENT – PART 4

Know how to solve lay out and pattern development problems

- Review the principles of pattern development
- Review the use of off-center tapers in metal fabrication
- Review the fabrication of various types of miters
- Review the use of round tapers on a pitch
- Review the use of a two-way switch
- Solve practical problems in layout
- Explain the processes in mathematical layout
- Summarize the principles of pattern drafting

E. READING PLANS AND SPECIFICATIONS – PART 4

Learn how to make shop tickets and cut lists from shop drawings

- Discuss the value of making shop tickets and cut lists
- Make a shop ticket from a drawing of a duct run
- Use the shop ticket to construct each piece of duct needed in the duct run

F. INDUSTRIAL SPECIALTIES – PART 4

Understand the types, applications, and installation of heavy gauge metals and other industrial specialties

- Explain why working with heavy gauge metal requires different skills than working with light gauge metal
- Calculate stretch-out for sixteen gauge and heavier metal
- Lay out the bend lines of heavy metals to properly account for metal thicknesses
- Calculate stretch-out for cylinders
- Evaluate and choose proper vee die sizes
- Describe the basic procedures for building a sign
- Explain the various components of blowpipe construction
- Identify and illustrate special blowpipe fittings
- Explain how special fittings are used
- Describe boiler breeching
- Explain how to install boiler breeching

G. SHOP WORK – PART 4

Know the functions of special sheet metal power equipment

- Discuss and demonstrate the use of coil line systems
- Discuss the features and function of a cleat bender
- Demonstrate the use of a cleat bender
- Discuss the features and function of a pin spotter
- Demonstrate the use of a spin spotter
- Discuss the features and function of a shopmaster machine
- Demonstrate the use of a shopmaster machine

H. HEATING, VENTILATION, AND AIR CONDITIONING (HVAC) SYSTEMS – PART 4

Learn the principles, processes, units, and functions of devices used for conditioning the air

- List the basic properties of air.
- Describe the following for a given air condition: a. psychometric temperature b. dry bulb temperature c. relative humidity d. dew point
- Describe the refrigeration cycle
- List the basic components of a refrigeration unit
- Describe the function of each unit
- Describe the difference between six different types of fan
- Use fan laws when making changes in a fan system
- Describe positive and negative pressures in a building or room
- Describe the basic operation of an economizer cycle
- Explain why heat loads are calculated
- List the three main sources of heat loss
- List the most common method of sizing duct
- Explain the importance of indoor air quality

I. TESTING AND BALANCING – PART 2

Understand the proportionate method of testing and balancing a system

- List three advantages of the proportionate method of testing and balancing
- List five main steps used to balance simple duct systems
- Explain why different fan wheels are required for positive and negative systems

J. ARCHITECTURAL SHEET METAL – PART 4

Know the construction of metal buildings, skylights, and curtain walls

- Describe different types of metal ceilings
- Demonstrate how to install metal ceilings
- Discuss installation of specialty items
- Demonstrate how to install roof panels
- Demonstrate how to install flashing, counter flashing, gravel stop and coping
- List the advantages of metal buildings over other types of buildings
- Identify two types of roof used on metal buildings
- Identify two types of skin used on metal buildings
- Identify components commonly used in metal buildings
- Describe the steps for installing a skylight
- Explain the difference between the two types of curtain wall

K. ELECTRONIC AND COMPUTERIZED CONTROLS – PART 2

Learn the functions and operation of electronic and computerized controls

- Describe the operation of electronic control systems
- List the four main advantages of electronic control systems over conventional systems
- Explain specific electronic control system components
- Define a computerized control system
- List five main advantages of computerized control systems over conventional systems
- Explain the purpose of an energy management system (EMS)
- Distinguish between three levels of EMS systems

- Discuss how to avoid damage from static electricity
- List four things to avoid in the location of control components

L. FOOD SERVICE AND BEVERAGE DISPENSING EQUIPMENT – PART 2

Understand the fabrication and installation of food service and dispensing equipment

- Discuss why fabricating food service and beverage dispensing equipment requires a high degree of craftsmanship
- List the different materials used in fabricating and installing food service and beverage dispensing equipment
- Describe some of the special techniques in laying out patterns on stainless steel
- Describe how patterns for stainless steel food service equipment are notched and formed
- Describe the general process of assembling and welding food service equipment fixtures
- Describe the responsibilities of the sheet metal worker who is in charge of installing food service equipment

M. SUPERVISORY TRAINING

Know the expectations and requirements for a supervisor

Describe the responsibilities of a supervisor

- List six qualities needed to make a good supervisor
- Compare the advantages and disadvantages of supervision
- Explain the importance of organizing work
- Distinguish between different levels of supervision
- Explain how supervisors should deal with personnel problems
- List problem solving techniques
- Learn how to control employee drug and alcohol abuse on the job

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

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

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



Training Proposal for:
**Southern California Surveyors Joint Apprenticeship
 Committee**

Agreement Number: ET19-0917

Panel Meeting of: August 24, 2018

ETP Regional Office: San Diego

Analyst: K. Hernandez

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate Apprenticeship	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Imperial, Inyo, Kern, Los Angeles, Mono, Orange, Riverside, San Bernardino, San Diego, San Luis Obispo, Santa Barbara, Ventura	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Union of Operating Engineers Local 12		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$294,375		\$20,375 8%		\$314,750

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate Apprentice	Commercial Skills	125	08-200	0	\$1,684	\$22.77
				Weighted Avg: 75			
2	Retrainee Priority Rate Journeyman	Commercial Skills	50	08-200	0	\$2,085	\$22.77
				Weighted Avg: 75			

Minimum Wage by County: SET Priority Industry: \$22.77
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job 1		
Apprentice C-G		125
Job 2		
Party Chief and Chainman (Journeyman)		50

INTRODUCTION

Established in 1960, and headquartered in Rancho Cucamonga, the Southern California Surveyors Joint Apprenticeship Committee (SCSJAC) (www.scsurveyjac.org) provides Apprentice and Journeyman Surveyors training throughout 12 counties in Southern California. It is administered jointly by the Southern California Association of Civil Engineers and Land Surveyors. The International Union of Operating Engineers, Local 12 (Union). SCSJAC has secured 100 signatory companies that include engineering, surveying, and construction firms.

This will be SCSJAC's fourth ETP Agreement, the third within the last five years. In this proposal, training will continue for Apprentices and Journeymen. Training includes surveying equipment, survey procedures, surveying practices, surveying computations, advanced coordinate geometry, plan reading, and laptop surveying/aerial photogrammetry.

PROJECT DETAILS

The Party Chief and Chainman (Journeyman) trainees are employed by engineering, surveying and construction firms throughout Southern California. They are required to attend 8 quarters of classroom/lab based instruction which is approximately 54 hours/per quarter and document up to 4,000 hours of on-the-job training that is not reimbursable by this ETP project. After completion of the related classroom/lab instruction and the required hours of on-the-job training, they may be dispatched as a Party Chief.

The Apprentice trainees are employed by engineering, surveying and construction firms throughout Southern California. Apprentice Trainees are required to attend classroom/lab based instruction for 5 semesters which is approximately 100 hours/per semester over three years and document up to 6,000 hours of on-the-job training that is not reimbursable by this ETP project. After completion of the related classroom/lab instruction and the required hours of on-the-job training, the Apprentices earn the status of Chainman.

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 takes three years to complete the Apprentice program.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$26 to \$21 per class/lab hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown in the Training Plan Table for the Panel's information.

Employer Demand

The proposed training is designed to meet the signatory employer's need for skilled land surveyors to work in specialized jobs with skills to master new technologies.

Funding for this training will increase the employability of Apprentice and Journeyman workers. Projects currently under contract with signatory employers include the Los Angeles Rams stadium, Disneyland expansion (Anaheim), L.A.X. improvements, freeway Improvements (15 Freeway, 10 Freeway, and 405 freeway), public transportation improvements (LA light rail and LA Metro rail), and the Gerald Desmond Bridge replacement (Long Beach). The increase in the number to train from the current project is due to the increased worker demand (110 to 175). Consequently, the proposed funding is higher due to increased number to train, as well as the ETP increased reimbursement rate.

Curriculum Development

The curriculum was developed by surveyor industry professionals. Labor and management are consulted through joint committees at all levels once a year to update the curriculum. The curriculum has been developed through the years from direct feedback from industry professionals to provide a solid foundation of basic skills needed along with developing the attitude and aptitude to succeed in the survey industry. Trainees and employers are encouraged to provide feedback through their representatives on the Committee and directly to training personnel at the SCSJAC.

Training Plan

Commercial Skills – Training will be offered to Apprentice and Journeyman trainees. The Apprenticeship training will cover surveying equipment, techniques, procedures, practices, computations, and projects. The Party Chief and Chainman training is an advanced training that will cover the areas of UAV (Drones), AutoCAD technologies, commercial skills and changes in new equipment i.e., levels and 3D laser scanning.

Impact/Outcome

Certifications that may be earned through the training delivered in this project include: DAS certifications, DOL Certifications and First Aid.

Commitment to Training

The participating employers are committed to this project and support Journeymen and Apprenticeship training by providing facilities and materials as needed. Employers will continue to contribute to the training trust for every hour worked by Apprentices and Journeyman while continuing to provide valuable safety and on-the-job training. Apprentices will also receive up to 6,000 hours of on-the-job training and 4,000 hours for Journeyman at the employers' expense.

Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The project is being administered by SCSJAC's Administrator, Coordinator, Office Manager and Administrative Assistant. All training is administered out of SCSJAC's sole Rancho Cucamonga location. Trainers have a minimum of six years' experience and are either certified as Party Chiefs; have at least 18 college units outside of apprenticeship; are licensed by the State of California as a Land Surveyor in Training; or a Professional Land Surveyor. This criteria was agreed upon with Rancho Santiago College which screens instructors.

Marketing and Support Costs

Participating employers are notified by email and regular mail of program and upgrade courses. The SCSJAC also markets and advertises its program through their union local and via mailers sent to EDD offices and announcement on its website.

The SCSJAC is requesting 8% in support costs to assist in apprentice recruitment, employer outreach, and to conduct assessments of employer-specific job requirements. Although many of the signatory employers have already been made aware of this training opportunity, additional

outreach will take place to complete the project and assessment of employer-specific job requirements will occur during the term of the Agreement. Staff recommends the 8% support costs.

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0915	\$154,330	10/29/16 - 10/28/18	110	0	0*

*Based on ETP Systems, SCSJAC’s reimbursable hours have been tracked for potential earnings of \$190,633 (100% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through July 2018 of final training.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0902	Statewide	7/7/14 - 7/6/16	\$153,700	\$153,700 (100%)

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:

Apprentice C-G Training

COMMERCIAL SKILLS

- Surveying Equipment & Techniques:
 - Overview of the Survey Industry
 - Basic Field Operations and Setting Survey Points
 - Basic Measurement Techniques in Surveying
 - Introduction to Angle Measuring and Field Instruments
 - Introduction to Leveling
 - Introduction to Topographic Surveys
 - First Aid
 - Computer Literacy
- Survey Procedures:
 - Apprentice Responsibilities and Public Relations
 - Field Notes
 - Identification of Monuments
 - Linear Measurements
 - Introduction to Station and Location Systems
 - Review of Angles, Bearings and Instruments
 - Leveling Methods
 - Global Positioning Systems
 - Plan Reading and Grade Sheets
 - Introduction to Construction Surveys
- Surveying Practices:
 - Review of Measuring Systems
 - Review of Angles, Bearings and Location Systems
 - Trigonometry
 - Slope Staking
 - Electronic Distance Measuring and Recording
- Surveying Computations:
 - Coordinate Geometry
 - Horizontal and Vertical Curves
 - Traverse Surveys
- Surveying Projects:
 - Safety Procedures
 - U.S. Public Land Surveys
 - Property Surveys
 - Subdivision Surveys
 - Topographic and Photogrammetric Surveys
 - Staking Procedures for Various Projects
 - Heavy Construction Surveys
 - ALTA Surveys
 - Total Stations

- Public Relations
- Scope of Profession

Party Chief & Chainman (Journeyman) Training

- Plane Surveying and Coordinate Geometry:
 - Surveying Mathematics and Coordinate Geometry
 - Modern Field Methods and Measuring Systems
 - Locating/Eliminating Plan, Calculation and Staking Errors
- Advance Coordinate Geometry:
 - Advanced Coordinate Geometry and Curve Calculations
 - Complex Field Problems and Accuracy Requirements
 - Field and Office Calculating Techniques
- Laptop Surveying/Aerial Photogrammetry:
 - Laptop Surveying Using Trimble Business Center Software
 - Topographic Surveying Methods and Techniques
 - Topographic Surveying Analysis and Review
 - Performing Topographic Surveys
 - Plotting Field Data and Surveys for Quantities
 - Photogrammetry, Ground Control and Topo Analysis
- Plan Reading and Subdivision Surveying:
 - Types of Plans, Plan Reading and Locating Errors
 - Grading Plans and Control for Construction Projects
 - Staking Procedures and Improvement Plans
- Major Project Plans and Survey Layout:
 - Construction Plan Reading, Survey Control and Layout
 - Case Study of Multi-Story Building – Structural
 - Plans and Layout for Other Major Construction Projects
- Control and Geodetic Surveying;
 - Triangulation and State Plane Coordinate Systems
 - Astronomy and GPS Performing GPS Surveys
 - Dredging and Hydrographic Surveys
- U.S. Public Land and Property Descriptions:
 - Public Land System and Subdivision of Sections
 - Retracement Surveys and Restoration of Corners
 - Reading and Interpreting Property Descriptions
- Property Surveys and Legal Descriptions:
 - Property surveys and Legal Descriptions
 - Laws Affecting Surveyors
 - Supervision and Public Relations

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



Training Proposal for:
Jewish Vocational and Career Counseling Services

Agreement Number: ET19-0200

Panel Meeting of: August 24, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: C. Hoover

PROJECT PROFILE

Contract Attributes:	New Hire SET Multiple Barriers Medical Skills Training Priority	Industry Sector(s):	Healthcare Financial Services Technology/Other Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	San Francisco, Marin, San Mateo, Alameda, Santa Clara, Contra Costa	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$308,100		\$29,546 12%		\$337,646

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	New Hire SET Multiple Barriers Priority Medical Skills	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., MS-Didactic, Job Readiness Skills	79	8-260	0	\$4,274	\$15.18
				Weighted Avg: 150			

Minimum Wage by County: SET/MB-New Hire: \$15.18 per hour in Alameda, Contra Costa, Marin, San Francisco, San Mateo and Santa Clara counties

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

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

Up to \$0.18 per hour in health benefits may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Medical Assistant		22
Medical Office Worker		19
Office Worker		10
Financial Services Worker		16
Marketing Specialist		6
Systems Administrator		6

INTRODUCTION

Founded in 1973 and headquartered in San Francisco, Jewish Vocational and Career Counseling Services (JVS) (www.jvs.org) operates a wide range of employment and training programs. These programs and services help its clients with multiple barriers acquire the skills to become self-sufficient individuals and find jobs. JVS provides job search and job readiness training, and job placement and career counseling services. In addition, it delivers specialized vocational training programs that help unemployed and underemployed people. ETP training will be delivered out of its San Francisco headquarters serving the Bay Area’s San Francisco, Marin, Contra Costa, San Mateo, Alameda and Santa Clara counties. This is JVS’ fifth ETP Agreement, and the second in the last five years.

Last year, JVS served over 2,274 clients and placed them in 575 jobs with an average wage of \$30.80 per hour in meaningful jobs within the healthcare, financial services, utilities, business and

non-profit sectors. JVS continues to serve individuals with multiple barriers- deficiencies in language skills, mathematics skills, recent or relevant work experience, and lack of formal training required by employers. Employers in healthcare, financial services, computer/technical services and employers who employ general office support workers include:

- Camden Convalescent Hospital, John Muir Health, Kindred Hospital
- Bank of America, Bank of the West, HomeBridge Financial Services, Comerica Bank
- Apple Inc., Exact Software North America, LLC, Salesforce.com, Inc.
- Bridge Partners Consulting, Cast & Crew Entertainment Services, Lyft

Need for Training

Many of JVS clients lack necessary skills to meet minimum job qualifications in the San Francisco Bay Area. To address this challenge, JVS SF launched an ambitious expansion of its sector-focused Career Pathway programs in healthcare, financial services, and technology which are included in this proposal for ETP funding. Panel policy acknowledges the need for more training hours (up to 260 hours per trainee) to be delivered for New Hire trainees, which herein are unemployed individuals with multiple barriers. These New Hire (Multiple Barriers) trainees will require approximately 150 hours of training per trainee to deliver the extensive training needed to get good paying jobs within the Healthcare, Information Technology (IT), and Financial Services sectors.

Healthcare occupations demand electronic medical record systems' skills. Administrative jobs demand the use of Microsoft Office applications, enterprise management systems, and management of social media. Information technology (IT) platforms now include newcomers like Salesforce.com. Therefore, many Bay Area employers have a shortage of workers for skilled, entry-level jobs. All of these areas require workers to possess skill sets lacking in JVS clients.

Healthcare Demand

Current labor market information highlights the magnitude of health-related employment opportunities. The Employment Development Department (EDD) projects growth in healthcare jobs of up to 22% in the San Francisco-San Mateo metropolitan statistical area (MSA) by 2024 and a 25.4% growth in the Alameda-Contra Costa MSA by 2024, resulting in a projected total of over 300,000 healthcare jobs.

The Bay Area's population is projected to increase by 30% by 2040 with a 137% growth in the 65 and over age group, according to Plan Bay Area 2040. This demographic shift will drive significantly increased demand for care and the healthcare professionals to provide it.

Occupations in San Francisco-San Mateo-Redwood City MSA with the largest anticipated job growth during 2012-2022 include: Medical Assistants (5,140 projected by 2022, an increase of 24.5%).

Over the last year: JVS placed 76 Medical Office Workers at an average wage of \$20.69 per hour; 44 Medical Assistants at an average wage of \$21.50 per hour.

IT Demand

EDD projects a 31% increase in technology jobs by 2022 in the San Francisco-San Mateo-Marín MSA adding 15,000 new positions. EDD projects a 25% growth in database-administrator roles with average-hourly wages of almost \$52 per hour. Real-time labor market data indicates that there are over 4,000 openings in the Bay Area that required Salesforce-administrator skills.

EDD projects a 40% growth from 2012-2022 in market-research analysts and marketing specialist roles with average wages of almost \$40 per hour making JVS' digital-marketing training an effective upskilling opportunity.

Over the past year: JVS has placed 43 Systems Administrators at an average wage of \$40 per hour; 19 Office Workers at an average wage of \$18.66 per hour; and, 18 Marketing Specialists at an average wage of \$42.20 per hour.

Financial Services Demand

Real-time labor market data indicates that there are over 700 open positions in entry-level retail financial services in the Bay Area. Over the last year, JVS has placed 27 Financial Services Workers at an average wage of \$17-\$18 per hour, not including benefits.

PROJECT DETAILS

Curriculum Development and Customization

Curriculum is developed by trained educators based on direct input from JVS' employer partners and from all employers who hire its graduates. JVS is constantly adjusting programs in response to this input. Evaluations are conducted following each training class. Additionally, JVS receives feedback from employer partners and all employers that hire its graduates.

New Hire Training Plan

JVS will provide the following training via Class/Lab and E-Learning:

Business Skills: Training will be offered to the Medical Office Worker, Financial Services Worker, Marketing Specialist and Office Workers in Medical Coding Basics, Financial Regulations, Sales Skills and Bookkeeping.

Commercial Skills: Training will be offered to Financial Services Worker, Marketing Specialist and Office Workers. Courses will include Engaging with Customers, Marketing Strategy, Digital Marketing and Using Social Media.

Computer Skills: Training will be offered to all occupations. Courses will include Electronic Medical Records, Accounting Software, Salesforce Administration, Data Reporting, MS Office, Keyboarding and Google Drive and Google Docs.

Continuous Improvement: Training will be offered to all occupations in Customer Service, Working in a Team, Communication Skills, and Critical Thinking and Problem Solving.

Medical Skills: Didactic training will be offered to Medical Assistant and Medical Office Workers. Courses will include Patient Assessment and Care, Medical Records Management, Infection Control, Vital Signs, and Advanced Cardiac and Basic Life Support.

Job Readiness Skills: Training will be offered to all occupations. Courses will include Job Expectations, Resume Building, Online Applications, Personal Financial Records & Planning, and Career Planning & Assessment.

Commitment to Training

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

➤ Training Infrastructure

The Vice President, Grants and Research Associate, Data Manager and Outreach Coordinator will oversee administration. Steve Duscha Advisories will assist with administrative tasks. Training will be provided by in-house experts.

Special Employment Training/Multiple Barriers (New Hire)

Under SET, the participating employer is not required to demonstrate out-of-state competition. Trainees must be earning at least the statewide average hourly wage at the end of the retention period. However, these trainees are subject to the ETP New Hire Minimum Wage rather than the Statewide Average Hourly Wage. Trainees may also receive a higher portion of Job Readiness Skills (up to 50%).

Note: Contractor must pre-screen trainees to determine their eligibility prior to enrolling trainees. Barriers must be identified and kept on file with the Contractor. Contractor must also demonstrate that training will help trainees address the identified barriers.

➤ Retention Modification

The panel may also modify the retention period for these trainees, making it satisfied by employment of at least 90 days out of 120 consecutive days with up to three employers. Incidental placement with public and non-profit entities is permissible, not to exceed 25% of the total number of trainees retained in employment. JVS requests this modification.

Impact/Outcome

Training delivered in this project will lead to trainees earning the following certifications:

- Medical Assistant Certification
- Salesforce Administrator and Developer Certification
- Advanced Cardiac Life Support Certification
- Basic Life Support Certification

Marketing and Support Costs

JVS conducts targeted outreach and recruiting for its training programs. Marketing and outreach efforts include advertising with our community and non-profit partners, sharing program opportunities with government agencies such as the local Workforce Investment Boards (WIB) and human-service agencies, and by utilizing platforms like Craigslist to reach a wide audience.

JVS works closely with community-based organizations and non-profits throughout the Bay Area. They are partnering on client referrals, especially for referrals to JVS training programs and referrals to community-based organizations for additional supportive services. For example, JVS has developed partnerships in the East Bay to support local program delivery with groups including Rubicon, Opportunity Junction, Unity Council, East Bay Asian Local Development Corporation, Fremont Adult Continuing Education, and Fremont Family Resource Center.

JVS is constantly recruiting employers. JVS makes direct contact with employers referred through its partners, and it recruits through employer associations and web sites. JVS requests 12% support costs to assist with the effective implementation of this project, which will require on-going recruitment, assessment and oversight. Staff recommends the 12% support costs.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET13-0403	San Francisco	6/30/13 – 6/29/15	\$112,818	\$49,309 (44%)

For some employers, implementation of regulatory changes (Affordable Care Act) took more time than expected. Additionally, JVS had significant staff transition during the project period. With this project, JVS has had the same administrative staff in place during the entire development process, and it has hired a third-party administrator who has successful history with ETP and with JVS's new-hire training programs unlike its past administrative subcontractors. This proposal will continue new-hire training that JVS has successfully operated; therefore, requests no right-sizing.

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development for a flat fee of \$10,000.

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

N/A

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

8-260

Trainees may receive any of the following:

MEDICAL SKILLS - DIDACTIC

- Advanced Cardiac Life Support
- Basic Life Support
- Body Mechanics
- Clinical-Skills Certifications
- Clinical-Skills Refresher
- Documentation
- Electrocardiogram
- Equipment Skills
- Health Insurance Portability and Accountability Act
- Industry Overview
- Infection Control
- Medical-Office Equipment
- Medical-Records Management
- Medical Terminology
- Medication Administration and Management
- Medication Concepts and Calculations.
- Office Protocols and Systems
- Patient Assessment and Care
- Patient Communications
- Patient Education
- Patient Management
- Patient Rooming (Pharmacology)
- Patient Safety
- Patient-Centered Treatment
- Safe Working Conditions
- Scope of Practice
- Vital Signs

BUSINESS SKILLS

- Banking Culture
- Basics of Banking
- Bookkeeping
- Customer-Service Skills
- Financial Accounts
- Financial Regulations
- Financial-Services Industry
- Financial Systems
- Financial Terms
- Medical-Coding Basics
- Medical-Office Functions
- Medical-Office Operations
- Sales Skills
- Types of Financial Institutions

COMPUTER SKILLS

- Accounting Software
- Applications
- Basic-Computer Literacy
- Business-Process Management
- Data Reporting
- Electronic-Medical Records
- Google Drive and Google Docs
- Keyboarding
- Microsoft Office
- Presentation Software
- Salesforce Administration
- Salesforce Platform
- Security
- Software Customization
- User Management

COMMERCIAL SKILLS

- Data-Driven Marketing
- Digital Marketing
- Engaging with Customers
- Marketing Strategy
- Measuring Audiences
- Measuring Marketing Results
- Using Social Media

CONTINUOUS IMPROVEMENT

- Communication Skills
- Communication Styles
- Conflict Resolution
- Critical Thinking and Problem Solving
- Customer Service
- Handling Difficult Situations
- Leading Teams
- Working in a Team

JOB READINESS SKILLS

- Career Planning & Assessment
- Financial Literacy
- Job Expectations
- Networking
- Online Applications
- Personal Financial Records & Planning
- Presentation/Appearance
- Resume Building
- Winning a Job Offer

Note: Reimbursement for New Hire training is capped at 260 total training hours per trainee, regardless of the method of delivery. Job Readiness Skills cannot exceed 50% of the trainee's total training hours.



Training Proposal for:

San Mateo County Electrical Joint Apprenticeship and Training Committee

Agreement Number: ET19-0922

Panel Meeting of: August 24, 2018

ETP Regional Office: San Francisco Bay Area **Analyst:** D. Woodside

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate Veterans	Industry Sector(s):	Construction Green Technology Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
County Served:	San Mateo	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No International Brotherhood of Electrical Workers Local 617		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$847,080		\$58,875 8%		\$905,955

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Journeyman Priority Rate	Commercial Skills, Business Skills, Computer Skills, OSHA10/30	45	8-200	0	\$667	\$22.77
				Weighted Avg: 24			
2	Apprentice	Commercial Skills, OSHA10/30	180	8-210	0	\$4,492	\$22.77
				Weighted Avg: 200			
3	Veteran Apprentice	Commercial Skills, OSHA10/30	15	8-210	0	\$4,492	\$22.77
				Weighted Avg: 200			

Minimum Wage by County: SET/Priority Industry: \$22.77 per hour
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 Although employer provides health benefits, they are not being used to meet Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Journeyman Electrician/Inside Wireman		45
Apprentice and Veteran Apprentice Electrician/Inside Wireman		195

INTRODUCTION

Founded in 1947, the San Mateo County Electrical Joint Apprenticeship and Training Committee (SMJATC) (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 the National Electrical Contractors Association (NECA). This will be SMJATC's sixth ETP Agreement.

ETP funding will be used to train Journeymen, Apprentices, and Veteran 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.

The JATC reports that with the assistance of ETP funding, 43 Apprentices graduated in 2018 (almost double the number in 2016) and 41 more apprentices will graduate in 2019. SMJATC also reports that the number of registered Apprentices has increased by 40% since the approval of its current ETP Agreement. ETP funding will allow SMJATC to expand and upgrade its training to meet the needs of local employers and property owners.

Veteran Apprentice

The JATC is committed to supporting job-related training that helps Veterans transition into the California workforce. It recruits Veterans in cooperation with Helmets to Hardhats (<http://www.helmetstohardhats.org>), a national joint labor-management program that recognizes the link between skills acquired in military service and the building trades.

The Veteran training curriculum will be the same as Apprentice training. These trainees are in a separate Job Number to better track performance toward the goal of improved outreach for Veterans. Veterans who apply for an apprenticeship can skip the first stage (the written assessment) and go the second stage (the interview).

Employer Demand for Training

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 as well as increasing out-of-state competition, increasing costs, and higher quality standards and increasing complexity of construction projects, all combined with a retiring workforce.

Journeyman and Apprentice-level electricians will be working on new construction project renovations to libraries, schools, and colleges in San Mateo County, as well as the San Francisco International Airport. Additional construction projects include:

- Hyatt Hotel at San Francisco Airport
- Burlingame project near SFO (commercial development of old drive-in)
- San Carlos Office Park (includes offices and hotel)
- Half Moon Bay Library
- Transit Center in San Mateo
- Caltrans level separation
- Electrification of Caltrain
- Re-construction of Stanford Linear Accelerator

All training will provide skills needed to work on any electrical-related function at these construction sites.

Green Technology

Training will provide electrical workers with skills in emerging technologies including renewable energy and high efficiency electrical control systems. Many electricians find work retrofitting local commercial buildings with green technology to reduce the use of energy in older buildings. The equipment rooms in older buildings often contain energized equipment configured and connected to the communications network that serves the building. Electricians must have finely honed skills to update while not completely interrupting service to the building. The JATC is also active in building, setting up, and maintaining new electrical charging stations for electric vehicles. These new charging stations will play an important role in helping California meet its green goals.

Apprenticeship Program

Apprentice training may not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). As such, ETP funding supplements the cost of delivery for the Related and Supplemental Instruction (RSI)

portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this proposal, the program is five years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$26 to \$21 per hour. Journeymen training is reimbursed at the priority industry retraining rate of \$26 per hour. The ETP wage for all trainees is no less than \$22.77 per hour, tracking the statewide Special Employment Training wage as modified for priority industries. The actual wages paid are shown in the Training Plan Table for the Panel's information.

PROJECT DETAILS

All training is center-based training. SMJATC's state-of-the-art training facility in San Carlos offers hands-on class/lab sessions in advanced lighting technology, fire alarm installations, data/voice installations and energy efficiency technology installations. Additionally, the training facility is equipped to provide the latest training on energy efficiency. Apprentice Electricians work directly under the supervision of a qualified journeyman electrician in installing or maintaining a variety of approved wiring methods.

Journeyman Training

Commercial Skills: 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.

Computer Skills: Training will include scheduling, planning and modeling software. AutoCAD and Job Tracking applications will provide trainees with the tools to modify blueprints, look up project requirements, build budgets and timelines, design virtual buildings, and adjust computerized control systems.

Business Skills: Training will include learning 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.

Apprenticeship Training

Commercial Skills: 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.

Certified Safety Training

OSHA 10/30: Journeymen and apprentices may receive OSHA 10/30. The coursework must be approved by, and the instructors must be certified by Cal-OSHA. OSHA 10/30 is not included in the 10% limitation on safety training. Training will help ensure safe working conditions and fulfill current mandates requiring a percentage of an employer's on-site workforce be OSHA certified.

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.

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. NJATC works directly with equipment manufacturers and technology developers on 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.

In addition, the local hiring demands of San Mateo County have shaped the curriculum, such as the need for electricians with the ability to work with green materials and on more technically advanced construction projects.

Impact/Outcome

Certifications earned for the Journeyman and Apprentice training may include: OSHA 10, OSHA 30, Rigging and Lifting, Arc Flash Safety Awareness, Code of Excellence, Building Automation Systems, Green Audits, California Advanced Lighting Control Program (CALCTP) Installer and Lighting Acceptance Testing, and Title 24 Lighting Installation.

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, and will continue to be, provided by participating employers in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Three staff persons at the SMJATC office will assist with ETP Administration including marketing, recruitment, and employer needs assessments. The JATC staff will also coordinate class/lab scheduling. The JATC also retained Strategy Workplace to assist with administration.

Marketing and Support Costs

SMJATC is requesting, and staff recommends, 8% support costs to fund recruiting and qualifying additional participating employers for this program. 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. 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.

RECOMMENDATION

Staff recommends approval of this proposal.

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by SMJATC under its current ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Estimated	No. Completed Training	No. Retained
ET17-0935	\$490,158	06/30/17-06/29/19	254	206	0

Based on the ETP tracking system as of 7/19/18, 24,961 reimbursable hours have been tracked which equates to over 70% of the Agreement amount. The Contractor projects final earnings of 100% based on employment retention.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0910	San Carlos	10/08/15-10/04/17	\$423,160	\$423,160 (100%)
ET15-0907	San Carlos	09/02/14-09/01/16	\$257,994	\$257,994 (100%)
ET13-0912	San Carlos	10/29/12 – 10/28/14	\$277,345	\$274,299 (99%)

DEVELOPMENT SERVICES

California Labor Federation in Sacramento and Strategy Workplace in Burlingame 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

Trainees may receive any of the following:

COMMERCIAL SKILLS

- Codeology
 - National Electrical Code
 - Other Recognized Standards (Installation Changes)
 - Plan, Build and Use
 - Related Standards (Mandatory and Permissive Rules)
 - Special Occupancies and Equipment
 - Arc Flash
- Analog/Digital Circuit (AC/DC) Principles
 - Math for Electricians
 - Ohm's Law
 - Generators
 - Inductance/Reactance
 - Series/Parallel Circuits
- Grounding
 - Grounding and Bonding
 - 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
 - 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
- Code of Excellence

COMPUTER SKILLS

- Auto Computer-Aided Design (AutoCAD)
- Job Tracking System
- Scheduling & Planning Jobs

OSHA 10/30 (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

APPRENTICE

Class/Lab Hours

8-210 (Job Numbers 2 & 3)

COMMERCIAL SKILLS

- 2nd Year
 - Orientation, Level II
 - Test Instruments, Level I
 - Codeology, Level I
 - AC Theory, Level I
 - Blueprints, Level I
 - Electrical Safety-Related Work Practices, Level I
 - Transformers, Level I
 - Application #5: Conduit Bending
 - Application #6: Conduit Bending
 - Application #7: Comb. Circuit Wiring
 - Application #8: Transformer Connections
- 3rd Year
 - AC Theory
 - Blueprints
 - Code and Practices
 - Electrical Safety-Related Work Practices
 - Fire Alarm Systems
 - Grounding and Bonding
 - Transformers

- Conduit Bending: Rigid & EMT, Chicago & 555
- Lighting Control Panels
- Motor Controls: Relays & Start/Stop
- Cad-Welding
- Ground Testing
- Transformer Wiring
- CPR/First Aid Refresher
- COMET

➤ 4th year

- Code Calculations
- Blueprints (& layout yard)
- Grounding and Bonding
- Motors
- Motor Control
- Lightning Protection
- Lighting Essentials
- Field Trip to motor repair shop and Folsom power house
- Motor Controls: mag starter & 3-wire control
- PLC's
- VFD's
- Motor Control Labs
- Code Prep

➤ 5th Year

- Code and Practices
- Code Calculations
- Motor Control
- Orientation
- Rigging
- Torque
- PV/Solar Installer
- CALCTP
- Electric Vehicle Infrastructure Training Program (EVITP)
- CPR/First Aid Refresher
- Code of Excellence
- Foreman Training

OSHA 10 (OSHA Certified Instructor)

- OSHA 10
- OSHA 30

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

Note: Reimbursement for Job Number 1 Journeymen retraining is capped at 200 total training hours per trainee regardless of the method of training delivery. Reimbursement for Job Numbers 2 & 3 Apprenticeship training is capped at 210 hours regardless of the method of training delivery.



Training Proposal for:

**Sheet Metal Workers' Local No. 104 and Bay Area Industry
Apprentice and Journeyman Training Fund**

Agreement Number: ET19-0923

Panel Meeting of: August 24, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: C. Hoover

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate Veterans	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Northern California	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Sheet Metal Workers' Local Union No. 104		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$1,507,912		\$104,759 8%		\$1,612,671

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Journeyman Priority Rate	Commercial Skills, Computer Skills, Business Skills, OSHA 10/30	91	8-200	0	\$889	\$22.77
				Weighted Avg: 32			
2	Apprentice	Commercial Skills, Business Skills, OSHA 10/30	291	8-210	0	\$4,492	\$22.77
				Weighted Avg: 200			
3	Pre-Apprentice	Commercial Skills, Literacy Skills, OSHA 10/30	30	8-200	0	\$4,492	\$22.77
				Weighted Avg: 200			
4	Veteran Apprentice	Commercial Skills, Business Skills, OSHA 10/30	20	8-210	0	\$4,492	\$22.77
				Weighted Avg: 200			

Minimum Wage by County: Job Numbers 1-4 (SET / Priority Industry) - \$22.77 per hour
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No Maybe
 In line with the Collective Bargaining Agreement (CBA), up to \$3.07 per hour may be used to meet the Post-Retention Wage for Job Number 3.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1 (Journeyman)		
Building Trades Sheet Metal Worker; Air Conditioning Mechanic; Test / Adjust & Balancing Technician		91
Job Number 2 (Apprentice)		
Building Trades Sheet Metal Worker; Air Conditioning Mechanic; Test / Adjust & Balancing Technician		291
Job Number 3 (Pre-Apprentice)		
Building Trades Sheet Metal Worker; Air Conditioning Mechanic; Test / Adjust & Balancing Technician		30
Job Number 4 (Veteran Apprentice)		

Building Trades Sheet Metal Worker; Air Conditioning Mechanic; Test / Adjust & Balancing Technician		20
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*The wage range for Journeymen is due to cost-of-living adjustment by geographic region and varying union locals. The Apprentice rates follow suit, as a percentage of Journeymen.

INTRODUCTION

The Sheet Metal Workers' Local 104 and Bay Area Industry Apprentice and Journeyman Training Fund (Sheet Metal Trust) (www.smw104training.org) is an "umbrella trust" fund created through a collective bargaining agreement (CBA) between Local 104 and the Bay Area Association of Sheet Metal Contractors (Bay Area Contractors). The Trust oversees four training centers that serve 17 counties in Northern California assisting some 7,000 union members and approximately 285 signatory employers.

Prior to 1992, the signatory employers were members of five different sheet metal trade associations, each with a different trust fund. Following the creation of Bay Area Contractors, these five separate trust funds merged into one. Sheet Metal Trust is administered by 10 trustees designated equally by Local 104 and the signatory employers from Bay Area Contractors. These employers are primarily in the construction industry or transportation industries, both of which are Priority Industries for ETP.

Sheet Metal Trust sponsors seven different apprenticeship programs for the sheet metal trades. Three of those programs- Building Trades Sheet Metal, Air Conditioning Mechanic, and Test/Adjust & Balancing Technician will be funded under this proposal. Sheet Metal Trust serves about 991 apprentices, but did not apply for funding on behalf of the other programs based on lower enrollment and retention rates.

This will be the seventh ETP Agreement with Sheet Metal Trust (referred to previously as the Bay Area Sheet Metal JAC), the fourth in the last five years. This is the third time Veterans have been introduced as a distinct cohort of Apprentice trainees.

Veterans Program

Sheet Metal Trust will train 20 Veterans (Job Number 4). The Sheet Metal Trust's training programs are registered with Helmets to Hardhats, and Sheet Metal Trust works with other veteran groups as well.

Sheet Metal Trust is successfully serving veterans, delivering over 2,773 hours of training to 26 veterans. It is projected to earn the full-funding amount allocated to Veterans.

As a result of the merger between five trade associations, Sheet Metal Trust funds training for a large number of Apprentices over a broad geographic region. Sheet Metal Trust administered training for a total of 989 registered Apprentices located across 17 counties in 2018. Each region has its own training centers: East Bay located in San Leandro, North Bay located in Fairfield, and South Bay located in Santa Clara and Castroville.

The following four Sheet Metal Trust training centers will be participating under this ETP training program: Alameda/Contra Costa Sheet Metal Workers- San Leandro (Main Office); Monterey/San Benito/Santa Cruz Sheet Metal Workers - Castroville; North Bay Sheet Metal Workers - Fairfield; Santa Clara Sheet Metal Workers - San Jose.

Employer Demand

Construction work for sheet metal workers continues to grow in the Bay Area, especially on the San Francisco Peninsula and in the South Bay. Sheet Metal Trust reports that the construction projects below led to the registration of over 160 new Apprentices in 2017, and another 170 are expected in 2018.

- Chase Center Arena: The future home of the Golden State Warriors is expected to be completed in 2019. This is a \$1 billion dollar project.
- Google Campus
- Brooklyn Basin - commercial and retail project in Alameda. This is projected to be a \$1.5 billion dollar project.
- SF Transbay Terminal: Work continues with Phase 1 to complete in 2018. This is a \$1.6 billion project, including \$12 million for Heating, Ventilation and Air Conditioning (HVAC).
- California Pacific Medical Center, Van Ness Hospital project: This hospital is scheduled to open in March of 2019 and includes \$200 million in HVAC. This will be a 13-story hospital with 274 patient beds.
- Apple Campus

Funding will support the Sheet Metal Trust's commitment to developing and delivering certification classes that ensure workers are trained in the latest practices and technologies.

According to the Sheet Metal Trust, an upswing in construction has generated the need for more apprentices to enter the sheet-metal trade. In 2015, the number of 1st year apprentices accepted was 157. In 2016, it was approximately 200. In 2017, the number of 1st year apprentices accepted into this five-year program was 160. Additionally in July of 2017, Sheet Metal Trust had 110 graduates who were accepted in 2012, and it expects to graduate another 150 Apprentices in 2018 who were accepted in 2013.

Sheet Metal Trust is requesting ETP funds to train Pre-Apprentices (Job Number 3). This pre-apprentice program takes four to six months to complete, depending on when the pre-apprentice classes are taken and when the apprenticeship test is conducted. Depending on when indentureship efforts are made by an applicant, trainees moving from pre-apprentice to apprentice level normally occurs once or twice a year as the entrance exam is offered only once or twice a year.

As Journeymen retire and construction expands in the Bay Area, there is a gap of qualified sheet metal workers are in demand. As such, Sheet Metal Trust also seeks funding for Journeymen (Job Number 1).

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). ETP funding is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. Depending on the type of trade, apprenticeship programs vary in length. In this case, the program is five years.

For the building trades, it is not customary for workers to be employed for a standard retention period of 90 consecutive days with one employer. In that instance, the Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500

hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$26 to \$21 per hour. The ETP wage for Apprentices is no less than \$22.77 per hour. However, the actual wages paid are shown above in the Training Plan Table for the Panel's information.

PROJECT DETAILS

The Sheet Metal trade is one of the few crafts where a worker starts with raw material, creates a component, and then installs and maintains the product. Workers constantly meet new challenges: using their hands; visualizing and analyzing how components can be made or installed; knowing how mechanical systems work; and, practicing collaborative skills when working with customers and coordinating with other workers.

Pre-Apprentice

Pre-Apprenticeship is an option for most of the programs sponsored by Sheet Metal Trust. Applicants may choose this path to experience the trade enough to help with career decisions, gain additional work experience as needed for their apprenticeship application, and earn money pending acceptance into the full program.

Pre-Apprentice is an occupation with its own wage rates under each of the pertinent CBAs. These workers assist and are supervised by the Journeymen. Employers are limited in the number of Pre-Apprentices they can hire (relative to the number of Journeymen and Apprentices) and the tasks that can be assigned.

Sheet Metal Trust anticipates delivering the majority of Pre-Apprentice training hours in Commercial Skills. A small percentage will be in Literacy Skills in vocational English and math customized for the sheet metal trade and OSHA 10/30. Overall, the Pre-Apprentice program is approximately 24 hours in length and doesn't replicate courses taught in the apprenticeship programs.

Journeymen

For Journeymen, Sheet Metal Trust will offer specialty and upgraded Commercial, Business and Computer Skills and OSHA 10/30. These skills will address newer technologies and equipment such as Revit CAD Detailing Software, GTAW Welding, Testing Adjusting and Balancing Bureau (TABB) certification, and HVAC Fire and Life Safety Level 1 certification courses. This proposal will continue to allow Sheet Metal Trust to expand its number of classes teaching more advanced skills.

Training Plan

The majority of the training will occur in the fall, winter and spring months with limited training during summer. The types of training are outlined below:

Commercial Skills: Training will be provided to all occupations. Training may cover: green construction practices and materials; new equipment and updated building standards related to green business practices necessary to meet commercial requirements; new skills to develop,

retrofit and maintain greener buildings; and more safety competency, as opposed to just safety awareness.

Computer Skills: Training will be provided to the Journeyman occupation, which includes 3-Dimensional (3-D) virtual construction software. Sheet Metal Trust reports that if this training need is not met, the trend to send 3-D modeling offshore will continue. Other courses include: software applications for planning, scheduling, and tracking jobs; meeting "Lean Construction Project" requirements; and installing/adjusting automated systems.

Business Skills: Training will be provided to Journeyman and Apprentice occupations. Trainees will develop skills to collaborate and coordinate with construction workers from all of the various trades on the different parts of a building project. Trainees will need to learn team skills so that they can work well as part of a larger team and techniques to reduce waste and meet budgets. Training also includes leadership skills so that trainees can better manage projects.

Literacy Skills: Training will be provided to the Pre-Apprentice occupation and will include Math for Sheet Metal and Vocational English related to sheet metal projects and documentation to understand and utilize new technologies and equipment.

Certified Safety Training

OSHA 10/30: This training is a series of courses "bundled" by industry sector and occupation. Completion of the training results in a certificate that expands employment opportunities. Training consists of OSHA 10/30 for Apprentice, Pre-Apprentice and Journeyman occupations. The coursework is geared to construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Commitment to Training

ETP funds will not displace the existing financial commitment to training. Employers will continue to make contributions to the training trust for every hour worked by Apprentices, Pre-Apprentices, and Journeymen. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

Two Administrators in the Bay Area Chapter (San Leandro training site) will work closely with the training coordinators at each training site. Additionally, an administrative subcontractor, Strategy Workplace Communications, has been hired to help manage this ETP project. Sheet Metal Trust has 50 trainers to provide instruction at its four participating training centers for this ETP project. These trainers are subject matter expert Journeymen in the sheet metal trade.

Impact/Outcome

Certifications that may be earned include: Title 24 and CA Mechanical Acceptance Testing Technician, TABB Technician and Supervisor certifications, various American Welding Society Weld certifications, Environmental Protection Agency Refrigerant Handling certifications, North American Technicians Excellence, Inc. HVAC Service and Installation certifications, OSHA 10, OSHA 30, Rigging and Signal certifications, and HVAC Fire and Life Safety Level 1 certifications as well as certifications to use a variety of material handling and lift equipment.

Marketing and Support Costs

The Sheet Metal Trust is requesting 8% in support costs to promote training opportunities. Outreach is coordinated with the 285 signatory employers, many of which are small businesses. Support costs will also be used by Sheet Metal Trust in recruiting from the 6,500 union member population. Recruiting Pre-Apprentices and Apprentices from schools, employment centers and community organizations is needed. The ETP-funded training will be discussed at all labor-management meetings and pertinent trade, industry, and apprenticeship events.

Sheet Metal Trust routinely meets with signatory employers and other stakeholders to assess training needs for each geographic region. This includes face-to-face meetings, emails, and phone contact with the various Sheet Metal and Air Conditioning Contractors' National Associations and Local 104. Sheet Metal Trust anticipates personnel costs for recruitment and outreach in excess of the ETP support funds provided, and that nine Sheet Metal Trust staff people will assist with ETP-related marketing, recruitment, needs assessments, and scheduling. Sheet Metal Trust will assume responsibility for any additional costs. Staff recommends the 8% support costs.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

The following table summarizes performance by Sheet Metal Trust under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET18-0905	\$949,932	7/3/17 – 7/2/19	432	673	0

Based on ETP Systems, 57,349 reimbursable hours have been tracked for potential earnings of \$834,187.90 (88% of approved amount). The Contractor projects final earnings of 100% based on training currently committed to by employers and in progress through February 2019. Final reimbursement is anticipated to occur at the end of April 2019.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0921	Multiple	2/1/16 - 1/31/18	\$949,932	\$949,932 (100%)
ET14-0904	Multiple	11/25/13 - 11/24/15	\$1,177,197	\$1,177,197 (100%)

DEVELOPMENT SERVICES

California Labor Federation in Sacramento, in conjunction with Strategy Workplace Communications in Oakland, assisted with development of this proposal at no charge.

ADMINISTRATIVE SERVICES

Strategy Workplace Communications will perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

N/A

Exhibit B: Menu Curriculum

Class/Lab/E-Learning Hours

8-200 (Job Number 1 and 3)

Trainees may receive any of the following:

JOURNEYMAN

COMMERCIAL SKILLS

- Advanced Welding Skills
- Architecture Designs
- California (CA) Green Building Code Training
- Disaster Training
- Ducts Maintenance
- Energy Auditing: Total Building (Green Training)
- Energy Auditing: Total Heating Ventilation and Air Conditioning (HVAC) Systems (Green Training)
- Fire / Life HVAC System Building Inspection Training
- HVAC Fire and Life Safety Level 1
- HERS (CA Home Energy Rating System Program)
- Job Coordination Training
- Lean Construction Training
- Management and Monitoring of Materials
- Materials and Equipment Testing for Industrial Use
- Proper Machine and Equipment Set-Up
- Rigging and Signal Training
- Safe Working Practices
- Testing Materials and Equipment – Proper Set-Up and Use
- Understanding Changes to Industry Standards
- Upgrading Lead Handling and Asbestos Removal Skills
- Working with Building Materials Training
- Control System Service
- Detailing
- Gas Tungsten Arc Welding (GTAW) Welding
- Testing Adjusting and Balancing Bureau (TABB) Certification
- Survival Skills
 - Technology Update
 - Trade Math
 - Layout Review
- Title 24 Certification
 - California Mechanical Acceptance Testing Technician Certification (MATT)
 - Energy Efficiency

COMPUTER SKILLS

- 3-D Modeling – Virtual Construction
- Automated Systems Applications
- Benchmark Software – Lean Construction
- Job Tracking System

- Scheduling & Planning Jobs
- Revit Computer-Aided Design (CAD) Detailing Software

BUSINESS SKILLS

- Conflict Resolution
- Customer Service Skills
- Decision Making Skills
- Inventory Checklist
- Leadership Skills
- Problem Solving
- Project Management
- Teambuilding Skills

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10
- OSHA 30

PRE-APPRENTICE

COMMERCIAL SKILLS

- Introduction to Architectural Designs
- Introduction to Green Building
- Orthographic and Pictorial Views and Sketching
- Sheet Metal Career Paths
- Sheet Metal Language
- Sheet Metal Math
- Sheet Metal Tools, Equipment and Their Usage
- Understanding Changes to Industry Standards
- Disaster Training

LITERACY TRAINING

- Math for Sheet Metal Workers
- Vocational English Skills for Sheet Metal Workers
 - Reading Work Documents Accurately
 - Writing Reports
 - Communicating with Customers and Co-workers

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10
- OSHA 30

Class/Lab Hours

8-210 (Job Numbers 2 and 4)

APPRENTICESHIP

COMMERCIAL SKILLS

- Advanced Architectural

- Advanced Electricity for Sheet Metal Air Conditioning Service
- Advanced Layout and Fabrication
- Advanced Welding
- Air Balance Test Equipment Instruments
- Air Conditioning, Commercial Systems, Heating
- Air Distribution & Manufacturing Systems
- Architectural Sheet Metal
- Basic Electricity for Sheet Metal Air Conditioning Service
- Basics of Architectural Sheet Metal
- CAD Detailing
- Codes and Standards
- Commercial Systems, Heat Loads, Piping
- Common Furnace Features
- Control System Service
- Control Systems
- Detailing
- Electrical Systems Operation, Controls & Devices
- Fabrication and Shortcuts
- Field Installation
- Filters and Filter Housings
- Final Architectural / Industrial Project
- Final HVAC Project
- HVAC Fire and Life Safety Level 1
- Forman Training
- Furnace Installation
- Gas Tungsten Arc Welding (GTAW)
- Hazardous Material Recognition for the Test & Air Balance Industry
- HVAC Air Systems and Duct Design
- HVAC Energy Conservation
- HVAC Testing & Balancing Procedures
- Industrial and Stainless Steel Introduction
- Installing Thermostats, Flues and Vents
- Intermediate CAD
- Measuring and Sketching
- Metal Roofing
- Parallel Line Fittings
- Piping
- Plans and Specifications
- Project Management, Takeoffs, Estimates
- Properties of Air Distribution for Sheet Metal Air Conditioning Service
- Radial Line Layout and Sheet Metal Offsets
- Refrigeration for Sheet Metal Air Conditioning Service
- Refrigeration Theory for Sheet Metal Air Conditioning Service
- Residential AC Units
- Residential Duct Systems
- Residential Structure and Sheet Metal Work
- Service Basics for Sheet Metal Workers

- Sheet Metal Control Systems
- Sheet Metal to TABB
- Submittals and Shop Drawings
- Survival Skills
- Systems Installation & Troubleshooting
- Temperature Measurement Instruments & Duct Systems
- Title 24 Certification
 - California Mechanical Acceptance Testing Technician (CA MATT)
 - Energy Efficiency
- Triangulation Fittings
- Welding I
 - Process and Safety Overview
 - Gas, Metal Arc Welding (GMAW)
- Welding II
 - Gas, Metal Arc Welding (GMAW)
 - Flux-Cored Arc Welding (FCAW)

BUSINESS SKILLS

- Customer Service
- Project Management for the Test & Balance Industry

OSHA 10/30 (OSHA CERTIFIED INSTRUCTOR)

- OSHA 10
- OSHA 30

Note: Reimbursement for retraining is capped at 200 total training hours per trainee for Job Numbers 1 and 3 and 210 total hours per trainee (200 hours of Commercial and Business Skills + 10 hours of OSHA 10/30) for Job Numbers 2 and 4, regardless of the method of delivery.



DELEGATION ORDER

**Retrainee - Job Creation
Training Proposal for:
BGI Worldwide Logistics, Inc.**

Small Business

ET19-0194

Approval Date: August 6, 2018

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

CONTRACTOR

- Type of Industry: Transportation/Logistics
Priority Industry: Yes No

- Number of Full-Time Employees
California: 31
Worldwide: 31
Number to be trained: 31
Owner Yes No

- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 9%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$24,180
- In-Kind Contribution: \$26,744

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	18	8-60	0	\$780	\$16.70
				Weighted Avg: 30			
2	Retrainee SB <100 HUA Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	10	8-60	0	\$780	*\$13.25
				Weighted Avg: 30			
3	Retrainee SB<100 Job Creation HUA Priority Rate	Business Skills, Commercial Skills, Computer Skills, Continuous Impr	3	8-60	0	\$780	*\$13.25
				Weighted Avg: 30			

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

- Reimbursement Rate: Job #'s 1-3: \$26 SB Priority
- Counties: Los Angeles, Riverside
- Occupations to be Trained: Operations, Sales, Administrative, Warehouse, Supervisor/Manager, Owner
- Union Representation: Yes
 No
- Health Benefits: Up to \$1.00 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach assisted in the development of this ETP proposal for a flat fee of \$950.
- Administrative Services: TFS will provide administration services for an amount not to exceed 13% of payment earned.
- Training Vendors: To Be Determined.

OVERVIEW

Founded in 1999, BGI Worldwide Logistics, Inc. (BGI) (www.BGIworldwide.com) is a global freight shipping and logistics company operating in three locations: Signal Hill, Compton and Palm Desert, CA. Training will be provided to employees at all three locations. The Company is a one-stop supply chain resource which provides warehousing, distribution, transportation and shipping services provided to the aerospace/defense, construction, import/export, industrial, manufacturing, technology, wholesale/retail trade industries. This will be BGI's second ETP Agreement in the last five years.

Need for Training

In the prior project, the Company trained employees on integrated marketing and operation strategy initiatives. In this proposal, BGI plans to train employees on newly implemented software and process upgrades.

BGI purchased and implemented a new transportation management software system, CargoWise One. CargoWise One is a cloud-based system allowing clients access to a broad range of booking and order management tools including document management systems, 24/7 shipment tracking, reporting, distribution, transportation, and Customs automation. The system enables the Company to utilize more efficient and streamlined processes to improve productivity and service time, and customer service.

In addition, the Company plans to expand both its market range and company size by 2020. The Company has adopted a marketing strategy to expand services to current and targeted industries. Training will enable the Company to expand its customer base.

Retrainee - Job Creation

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

BGI will expand business capacity by hiring new employees to help with planned expansion. The Company will hire three new employees (Job Number 3) for the facility in Compton. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

Business Skills: This training will be offered to all occupations to develop skills and understanding of strategic management and processes. Trainees will be given techniques in teambuilding, coaching/leadership administrative processes, sales and marketing, and customer relations.

Commercial Skills: This training will be offered to Administrative, Management, Sales and Operations occupations to improve skills and develop a highly competent and effective staff.

Computer Skills: This training will be offered to will be offered to Production, Administrative, Management, Sales and Operations occupations in order to develop their overall skills and knowledge of utilizing software tools like CargoWise One and system upgrades (3PL Systems software, Microsoft Office Excel, PowerPoint and Outlook).

Continuous Improvement: This training will be offered to Administrative, Management, Sales and Operations occupations. BGI is moving towards increasing efficiencies across all functional areas by eliminating waste and redundancies in internal processes.

Modifications

High Unemployment Area

Thirteen trainees (Job Numbers 2 and 3) work 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 25% if post-retention wages exceed the start-of-training wages. BGI is requesting this wage modification.

Commitment to Training

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

➤ Training Infrastructure

Qualified, in-house trainers will provide training. BGI is ready to start training upon Panel approval. The Company has assigned the Data and Information Manager and an administrative staff to administer the project. The Company also retained the services of a third-party administrator (Training Funding Source) to assist with administration.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
Et16-0448	Signal Hill	04/30/16 – 04/29/18	\$20,280	16,523 (81%)

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 60

Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting: QuickBooks; Payroll; Excel; CargoWise One
- Administrative Process Improvement
- Change Management
- Coaching/Leadership
- Communication
- Credit and Collection Skills
- Customer Relations
- Planning
- Sales & Marketing/Negotiation
- Time Management
- Teambuilding
- Work Processes/Procedures

COMMERCIAL SKILLS

- Customs-Trade Partnership Against Terrorism
- Customs Brokerage
- Cargo & Deconsolidation
- Dangerous Goods for Air and Ocean
- Delivery; Inbound and Outbound Freight Forwarding
- Distribution Processes and Procedures
- Domestic Shipping—Trucking, Rail, Ocean, Air
- Warehouse Equipment Operations
- International Commercial Terms
- Inspection Techniques
- Inventory Management
- International Shipping — Ocean, Air
- International Traffic in Arms Regulations (ITAR)
- Logistics Skills
- Order, Picking and Packing
- Quality Control
- Sales to Operations Turnover
- Shipping and Receiving – Expediting for On-Schedule
- Standard Operating Procedures
- Supply Chain/Warehousing
- Transportation Security Administration Procedures
- Warehouse Procedures

COMPUTER SKILLS

- CargoWise One (cloud based operating system)
- Microsoft Office Programs
- Sales & Marketing Software (CRM)
- Payroll Reports
- Script Writing for Report Generation
- TMS (Transportation Management System 3PL)
- Warehouse Management

CONTINUOUS IMPROVEMENT

- Problem Solving Tools and Techniques
- Process Improvement
- Quality Improvement

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

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

DELEGATION ORDER



**Panel Amendment #3 Proposal for:
Bond Enterprises, Inc.
Agreement Number: ET17-0276**

Amendment Effective Date: 07/27/18

ETP Regional Office: North Hollywood

Analyst: M. Niquet

CURRENT PROJECT PROFILE

Contract Type:	Priority/SB<100	Industry Sector(s):	Technology/Other Services
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Priority Industry:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Current Contract Term:	December 08, 2016 to December 07, 2018	Substantial Contribution:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

CURRENT FUNDING

Current Funding
\$15,600

AMENDMENT FUNDING

Requested Funding	Total Funding
+\$10,920	\$26,520

AMENDMENT TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimate d No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB<100	Business Skills, Computer Skills, Cont. Imp.,	15	8-150	0	\$1,768	\$16.48
				Weighted Avg: 68			

Minimum Wage by County: \$16.48 per hour for Los Angeles County
Health Benefits: Yes No This is employer share of cost for healthcare premiums – medical, dental, vision.
Used to meet the Post-Retention Wage?: Yes No
 Up to \$3.93 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation	
Occupation Title	Wage Range
Technical	
Sales & Marketing	
Admin	
Manager	
Owner	

INTRODUCTION

Founded in 2000, Bonding Enterprises, Inc. (Bonding Enterprises) (www.BondConsultingServices.com) provides support services in accounting and sales systems. These Systems include Enterprise Resource Planning Systems (ERP) and Customer Relationship Management Systems (CRM). Bonding Enterprises assist Employers in selecting the right system to fit their business needs. Services include installation, integration, training and support services, and product customizing. Customers include employers in the Manufacturing, Distribution, and Professional Service Industries.

AMENDMENT DETAILS

Bond Enterprises is requesting additional funding to accommodate training needs. The Company requires training in Computer Skills, specifically Dynamics 365 Business. Training will focus on the operational and financial functionality of this solution to help clients. Training will help employees implement, customize and support the software to improve day-to-day processing.

The Company is also requesting to increase the maximum hours to 150. Currently, 9 trainees are well over 60 hours of training and many of those trainees are closer to 100 training hours. These trainees will become subject-matter experts, requiring additional training.

Bond Enterprises requests an additional \$10,920 in ETP funding to continue training in the Southern California Region.

In summary:

- The funding amount will increase by \$10,920, from \$15,600 to \$26,520
- The weighted average hours will increase from 40 to 68.
- Increase range of hours from 8-100 to 8-150
- The average cost per trainee will increase from \$1,040 to \$1,768
- In-Kind Contribution increased from \$21,840 to \$39,748

RECOMMENDATION

Staff recommends approval of this Amendment.

SUMMARY OF PRIOR MODS/AMDS

- Modification No. 1: Added 12 months to the term of the Agreement This Modification was approved on 10/27/17.
- Modification No. 2: Increased the Range of Hours from 8-60 to 8-100. This Modification was approved on 04/11/18

CURRENT CONTRACT PERFORMANCE

The following table summarizes performance by Bond Enterprises under a current ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET17-0276	\$15,600	12/10/2016- 12/09/2018	17	TBD*	TBD*

*To date, 895 eligible training hours have been tracked (100% of the current Agreement amount).13 trainee has been submitted for payment; however, 16 trainees have reached the 8-hour minimum requirement.

Exhibit B: Menu Curriculum

Class/Lab/E-Learning Hours

8-150 Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting/Billing- Understanding P & L's
- Budgeting & Financial Management
- Business Development/Sales
- Business Process/Project Management
- Coaching/Feedback
- Communication Skills
- Customer Service/Client Relations
- Digital Marketing
- Interview Skills
- Leadership and Management
- Marketing/Social Media
- Negotiation
- Organizational and Time Management
- Office Administration
- Performance Management
- Product Knowledge
- Small Business Assessment
- Social Media Marketing

COMPUTER SKILLS

- Adobe Creative Suite--InDesign, Photoshop, Illustrator
- Agile
- Cloud Hosting
- Credit Card Merchant Services
- Dynamics CRM
- Microsoft SQL Server Database Administration
- Disaster Recovery
- Dynamics 365/GP/AX/CRM for Manufacturing, Distribution, CPG
- eCommerce
- Managed Services
- Microsoft (Office 365/Project/SharePoint)
- Professional Services Automation
- Payroll/Human Resources
- Systems Integration
- Skype for Business

CONTINUOUS IMPROVEMENT

- Business Process Assessment
- Cost Reduction
- Eliminating Waste, Goal Setting, Improving Workflow
- ISO 9000
- Lean Enterprise
- Problem Solving, Process and Quality Improvement
- Root Cause Analysis
- Statistical Process Control - SPC
- Team Building
- Workflow Mapping

Note: Reimbursement for retraining is capped at **150** total hours per-trainee, regardless of method of delivery.



TRAINING PROPOSAL FOR

Cal-Duct, Inc.

18-0655

Approval Date: August 10, 2018

Regional Office: North Hollywood Regional Office

Analyst Name: Monique Webb

Type of Proposal: Single Employer (SB), Small Business Program

Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$45,760.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$45,760.00	N/A	N/A	\$69,500.00

APPLICANT PROFILE

Company Summary	Cal-Duct, Inc. (Cal-Duct) manufactures and distributes reliable materials such as HDPE conduit, PVC conduit and pull boxes for the commercial, residential and construction industries.
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Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	State: 45 US: 45 World Wide: 45
Turnover Rate (Applicant)	5.00%
Repeat Contractor	No
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will increase employee skills for improved proficiency. Staff will learn to operate heavy equipment, utilize computer software, and implement new sales techniques to market Cal-Duct products and services.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	44	\$26.00	40	\$1,040	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1976, Cal-Duct is a manufacturer/distributor located in Bloomington. The Company utilizes tools such as saws and machinery to cut and shape the following; PVC conduit, electrical Conduit, sweeps, fittings, multi-cell ducts, fiberglass ducts, galvanized pipes, and other underground utility products used for building and construction usage. Customers include commercial and residential companies (builders), landscape contractors, electric companies and general contractors.

2. Current Training Project Details

Purpose of Training

Cal-Duct has developed a training program, Epicor P21, which includes training for dispatch, logistics and procurement staff. This program will increase efficiencies in routing deliveries, purchasing levels, POS, invoicing efficiency and collections. Training will reduce driver and warehouse load times when filling large orders for the customer.

Continuous Improvement, Computer and Business Skills will be delivered to Administrative Staff in all fields required. Computer Skills training will include Adobe Illustrator and Adobe Premier Pro to revamp the Company website, improve marketing skills, and learn how to produce submittal and specification sheets for projects that are imperative to the Sales and Production Departments. Team development, training, job cost management and awareness training will also be provided to enhance productivity in a market that demands quality products at low costs.

In addition, Cal-Duct has also started expanding its Production Manufacturing department. Production Staff will participate in equipment operation training to ensure workers are able to use metal cutting machinery such as the 14" Slugger Metal Cutting Saw. This saw is used to make precise and clean cuts through steel and metal, and perform duties that entail cutting very large PVC pipes into smaller pieces. Additional equipment training will include proper operation of heaters, bending boards/tables, coupling machines, and vent stand machines. Training delivered will increase the company's ability to return profitable margins, reduce waste, promote employees from within, and avoid costly lay-offs.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	<p>Cal-Duct has designated two Human Resource staff members to schedule training, and work with a third party administrator to complete enrollment, and track training hours The Controller and Human Resources staff will oversee all contract administration and implementation.</p> <p>The Human Resources Staff will also coordinate with each department to schedule training, and submit rosters to the subcontractor for uploading into the ETP Online Systems. Training will be conducted by in-house experts and vendors as needed. The Company is ready to begin training upon contract approval.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Trainees will receive Business, Commercial, Computer, Continuous Improvement, Hazardous Material, and Manufacturing Skills training delivered through Class/Lab (Attachment 2).	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
Trainees will receive Business, Computer and Manufacturing Skills training delivered through Computer Based Training (Attachment 2).	

Delivery Method/Level	Productive Laboratory
Summary	
Trainees will receive Manufacturing Skills training delivered through Productive Lab Training (Attachment 2).	

PROPOSED TRAINING PROJECT DETAILS

4. Additional Company or Training Project Details

4.1 Program Waivers

High Unemployment Area

All trainees work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company requests a wage modification from \$16.70 to \$12.53.

4.2 Subcontractor Summary

Cal-Duct has retained the services of the following Subcontractors.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$2,900
Administrative	Training Funding Source	Seal Beach	13.00%
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>	
Training Type (Level)	Planned Course Offerings	
Business Skills	Budget	
	Change Management	
	Coaching/Collaboration/Communication	
	Conflict Management	
	Customer Satisfaction	
	Leadership	
	Planning	
	Product/Service Knowledge	
	Risk Reduction	
	Sales	
	Time Management	
	Commercial Skills (Standard)	OSHA 10
Computer Skills (Standard)	Adobe	
	Epicor P21	
	Human Resources	
	Microsoft Office	
	Payroll	
	Website	
Continuous Improvement Skills	Process/Performance/Productivity Improvement	
	Quality Systems and Procedures	
	Team Building/ Problem Solving/ Decision Making	
Hazardous Materials Skills	Flammable Liquids/Gases	
	Hazard Communication (HazCom)	
	Material Safety Data Sheet (MSDS)	
Manufacturing Skills (ME) (Standard)	Equipment Operation, Maintenance, Troubleshooting	
	Job Cost	
	Material Sourcing/Handling and Storage	
	Power Tool Use	
	Quality Control	
	PVC Cut/Fabrication/Installation Procedures	
	Shop/Yard Operational Procedures	
	Site Logistics	

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	Planning	0.50
	Productivity	0.50
	Project Startup	0.75
	Records Management	0.50

Attachment 2 - Training Delivery and Curriculum Listing

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

Computer Skills	e-Train P21 Intro	2.50
	e-Train P21 Purchasing	3.50
	e-Train P21 Sales	6.50
	Shared Folders	0.50
	Timekeeping	1.00
	e-Train P21 Accounting	2.50
	e-Train P21 Dispatch	1.50
	Email Archive	0.50
	Email Etiquette	0.50
	MS Excel	9.00
	MS Office Intro	1.00
	MS Outlook	3.00
	MS PowerPoint	3.00
	MS Word	6.00
Manufacturing Skills (ME) (Standard)	Cutting and Bending	2.00
	Documentation	1.00
	Hand and Power Tools	1.00
	Hazardous Communication	2.00
	Equipment Operations	1.00
	Labor Cost and Productivity	1.00
	Scheduling	1.00

Delivery Method /Level	Productive Laboratory	
Training Type (Level)	Planned Course Offerings	
Manufacturing Skills (ME) (Standard)	Cutting and Fabricating PVC	
	Equipment Operations	
	Operational/Installation Procedures	
	Power Tool Use and Guarding	
PL Justification and Details		
Explain the need for productive laboratory (PL) training	Cutting, bending, shaping, fabricating pipe can't be replicated in class. Production employees will learn how to produce pipe and install.	
Describe the Equipment/Processes to be used in delivering the PL training	Trainees will be trained on various manufacturing equipment pieces including, installation tools and equipment, power screen, tool and guarding, computers and product identification. These are the same computers and loading methods that they will be using when training is completed. Trainees will be assigned tasks, based on job requirements once the training is completed. They will operate equipment, use power tools, watch material installation by following procedures that will be discussed	
Describe Trainer Qualifications	Trainers are fully qualified in the specific are of training. The trainers are usually from lead employees or supervisors with extensive experience in the processes and equipment being used for training.	
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer	Trainee
Ratio for One Class, or Minimum When More than One Class	1	1
Ratio for Maximum Ratio When More than One Class	1	2
PLT Approval	Yes	



**Training Proposal for:
Car Sound Exhaust System, Inc. dba MagnaFlow**

Delegation ≤ \$75,000 Single Employer

ET #19-0153

Approval Date: July 18, 2018

ETP Regional Office: San Diego

Analyst: M. Ibarra

CONTRACTOR www.magnaflow.com

• Type of Industry: Manufacturing

Priority Industry: Yes No

• Number of Full-Time Employees

California: 320

Worldwide: 506

Number to be trained: 83

• Out-of-State Competition: Yes

• Special Employment Training (SET): Yes

• High Unemployment Area (HUA): Yes

• Turnover Rate: 15%

• Repeat Contractor: Yes

FUNDING

• Requested Amount: \$72,072

• In-Kind Contribution: \$143,324

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	ETP Required Wage*
				Class / Lab	CBT		
1	Priority Industry	Business Skills, Computer Skills, Continuous Impr, HazMat, Mfg Skills	65	8-200	0	\$936	\$17.03
				Weighted Avg: 36			
2	Priority Industry Job Creation Initiative	Business Skills, Computer Skills, Continuous Impr, HazMat, Mfg Skills	18	8-200	0	\$624	*\$14.19
				Weighted Avg: 24			

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

- Reimbursement Rate: \$26 Priority/Program Initiatives
 - County(ies): San Diego
 - Occupations to be Trained: Administrative Staff, Engineer, Technician, Production Staff, and Supervisor/Manager
 - Union Representation for Trainees: Yes
 - Health Benefits: (Employer Paid to Meet ETP Wage) No Yes
- Up to \$2.50 per hour may be included to meet ETP Required Wage for Job #'s 1 and 2

OVERVIEW

Year Company Founded:	1979	Company Headquarters: <input type="checkbox"/> Single location Oceanside, CA
Total Number of Facility locations in California	2	
Facility location(s) where training will occur (Cities & Counties)	Oceanside, CA (San Diego County)	
Nature of Business	At its two Oceanside locations, MagnaFlow designs, develops, and manufactures aftermarket catalytic converters and performance exhaust systems for automobiles. The Company's products include universal-fit catalytic converters, direct-fit cat-back exhaust systems, stainless steel tips, and XL line of turbo mufflers.	
Customer Base:	Professional exhaust installers through auto dealers (worldwide), wholesale auto parts distributors, and retail auto parts stores.	
Business / Industry Needs / Changes	<ul style="list-style-type: none"> • MagnaFlow recently acquired an original equipment manufacturer (OEM) company. 	

	<p>The Company will need to train those employees on MagnaFlow products, procedures, and software systems;</p> <ul style="list-style-type: none"> • MagnaFlow plans to sell aftermarket products directly to customers through internet sales, adding business-to-consumer (B2C) to the Company's current business-to-business (B2B) model. The Company must provide its employees knowledge and skills to utilize new ecommerce systems and technology; and • MagnaFlow recently added a new production shift to increase capacity and support company growth.
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Training Plan:

Need for Training:	<ul style="list-style-type: none"> • New Equipment/Software: MagnaFlow invested \$8M to acquire new Computer Numerical Control (CNC) robotics. The Company will provide CNC machine and programming training to Engineers, Technicians, and Production Staff. MagnaFlow will also provide various computer skills training to all employees to successfully utilize full capabilities of new software systems such as a new Learning Management System. • Process Improvement: MagnaFlow is developing a new web-based sales channel directed to consumers. Company-wide training will be provided to all employees to operate systems and understand processes including directly assisting customers with sales and product-related information.
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Training courses listed in the Menu Curriculum will be provided via the following training method(s) under the following Types of Training:

- Class/lab
 E-Learning
 CBT
 Productive Lab

Business Skills	Computer Skills	Continuous Improvement
Hazardous Materials	Manufacturing Skills	

Certified Safety Training	<input type="checkbox"/> OSHA 10/30 <input type="checkbox"/> HAZWOPER <input checked="" type="checkbox"/> Hazardous Materials (HAZMAT)
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Job Creation Justification	<input checked="" type="checkbox"/> Expanding existing business capacity by adding newly-hired employees to an existing function; and, <input checked="" type="checkbox"/> Expanding existing business capacity by adding a new production shift;
<i>Training Infrastructure & Administrative Plan</i>	<ul style="list-style-type: none"> • Trainers: In-house subject-matter experts and vendors, if necessary • Project Manager: Vice President of Human Resources will oversee the overall administration and implementation (coordinating & scheduling) of training with assistance of support staff. • Administrative Duties: In this proposal, Magnaflow will contract with an administrative subcontractor, Training Funding Source, to assist with project administration. The Company’s People Development Manager will submit copies of completed attendance rosters to administrative subcontractor for uploading in the ETP online system.

Repeat Contract

<ul style="list-style-type: none"> • Number Of Agreements in last 5 years: 	2
<ul style="list-style-type: none"> • Training provided in last Agreement: 	<ul style="list-style-type: none"> • Trained at its headquarter in Oceanside (San Diego County) and former Rancho Santa Margarita (Orange County) locations; • Training in new manufacturing equipment, such as stainless steel tubing, bending, and laser machines, and software; • Training in new products; and • Training in quality improvements to meet requirements specified in ISO. Standards.
<ul style="list-style-type: none"> • Difference in Training Plan: 	<ul style="list-style-type: none"> • Training at two Oceanside locations (headquarter and a new R&D facility); • Training in new equipment, such as CNC machines, and software systems; and • Training in new software systems specific to ecommerce methods using Shopify platform.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
*ET14-0320	Rancho Santa Margarita and Oceanside	4/28/14-4/27/16	\$198,456	\$74,156 (38%)
ET12-0210	Rancho Santa Margarita and Oceanside	12/30/11-12/29/13	\$333,520	\$283,844 (86%)

MagnaFlow documented 3,972 eligible training hours, equivalent to \$74,156 (38% of the agreement amount) in earnings for 220 trainees who completed retention.

*Poor performance was due to increased production demands which resulted in training not being delivered. Customer demand resulted in a 20% increase in order backlog and overtime was running at 250% above normal, which did not allow time for training. Additionally, production decreased during the last 12 months of the Agreement because MagnaFlow was consolidating its manufacturing, engineering, and R&D from the Rancho Santa Margarita facility to its current headquarters in Oceanside. Employees from its Rancho Santa Margarita facility were provided an opportunity to transfer to the newly-expanded facility in Oceanside.

The Company has since been able to gain focus on the daily business processes in both its Oceanside locations. MagnaFlow continues to experience growth; however, to ensure performance in this proposal, the Company will support customer demands by only including lead Production Staff and will not include Production Staff who are direct labor employees impacted by the increased production demands. The Company will also utilize a vendor to assist with project administration to help ensure success.

Accordingly, this project has been right-sized to \$72,072 to more closely mirror earnings in its prior Agreement (\$74,156).

RECOMMENDATION

Staff recommends approval of this proposal.

SUBCONTRACTORS

Subcontractor Type	Subcontractor Name	City	Cost / %
• Development	Training Funding Source	Seal Beach, CA	\$2,900
• Administrative	Training Funding Source	Seal Beach, CA	Not to exceed 9%
• Training Vendors	To Be Determined		N/A

Exhibit B: Menu Curriculum

Class/Lab Hours

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- ✦ American Production and Inventory Control Society (APICS)
- ✦ Business Acumen
- ✦ Communication
- ✦ Conflict Resolution
- ✦ Effective Meeting Management
- ✦ Finance/Accounting
- ✦ Goal Setting/Motivation
- ✦ Inventory Management
- ✦ Logistics/Supply Chain
- ✦ Metrics Management
- ✦ Negotiation
- ✦ Presentation
- ✦ Product Management
- ✦ Product/Service Knowledge
- ✦ Sales
- ✦ Train the Trainer

COMPUTER SKILLS

- ✦ Engineering Software
- ✦ Enterprise Resource Planning (ERP)
- ✦ Electronic Data Interchange (EDI)
- ✦ HRIS/Payroll System
- ✦ IFS System
- ✦ Inventor Programming
- ✦ Inventory Control
- ✦ Learning Management System (LMS)
- ✦ Microsoft Office (Intermediate or Advanced)
- ✦ Programmable Logic Controller (PLC)
- ✦ Programming and Database
- ✦ Quality System
- ✦ Ultipro Software
- ✦ Web Application

CONTINUOUS IMPROVEMENT

- ✦ 5 Whys Techniques for Root-Cause Analysis
- ✦ Agile Product Lifecycle Management (PLM)/Agile PM
- ✦ Best Practices
- ✦ Decision Making/Problem Solving
- ✦ Design of Experiments
- ✦ Engineering Change Process
- ✦ Failure Mode and Effects Analysis
- ✦ ISO Standards
- ✦ Leadership/Coaching
- ✦ Lean Manufacturing

- ✚ Performance/Program Management
- ✚ Process Flow Analysis
- ✚ Process/Quality Improvement Skills
- ✚ Program/Project Management
- ✚ Quality Standards/Quality Auditing
- ✚ Root Cause Analysis
- ✚ Statistical Process Control
- ✚ Teambuilding Skills
- ✚ Time Management

HAZARDOUS MATERIALS

- ✚ Hazardous Communication and Operations

MANUFACTURING SKILLS

- ✚ Assembly Procedures
- ✚ CNC Machine Operation and Programming
- ✚ Equipment/Tool Operations and Preventative Maintenance
- ✚ Gauges/Calibration
- ✚ Measurement and Calibration
- ✚ Standard Operating Procedures

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.



Delegation Order

Training Proposal for:

C&H Sugar Company, Inc.

Agreement Number: ET19-0184

Approval Date of: July 13, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Contra Costa	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Sugar Worker's Union Local #1; Int'l Longshore & Warehouse Union Local #6		
Number of Employees in:	CA: 450	U.S.: 450	Worldwide: 450
<u>Turnover Rate:</u>	6%		
<u>Managers/Supervisors:</u> (% of total trainees)	4%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$54,990		\$0	\$0		\$54,990

In-Kind Contribution:	100% of Total ETP Funding Required	\$65,300
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, PL-Mfg. Skills	47	8-200	-0-	\$1,170	\$18.22
				Weighted Avg: 45			

Minimum Wage by County: \$18.22 for Contra Costa County

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

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

Up to \$0.24 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative/Support Staff		3
Production Staff		37
Technical Staff		5
Supervisor/Manager		2

INTRODUCTION

C&H Sugar Company, Inc. (C&H Sugar) began refining pure cane sugar in Crockett in 1906. Today the Crockett facility produces over 700 thousand tons of cane sugar annually – more than 70 types, grades, and package sizes, including packaged consumer sugars as well as liquid and bulk granulated industrial-use cane sugars. Training will take place at the Crockett facility.

PROJECT DETAILS

This will be C&H Sugar's third ETP Agreement, the third in the last five year. Training in the prior Agreement upgraded worker skills and knowledge to improve customer satisfaction and increase market shares. The second Agreement provided funding to train employees in new processes to produce organically certified cane sugar and other natural sweeteners.

This proposal will continue the Company's training efforts in maintaining a competitive advantage in the global sugar marketplace through new products. Trainees who participated in previous Agreements will not receive duplicate training under this training proposal. Eight of the proposed trainees are Veterans.

Consumer habits for sugar consumption has evolved, demanding more brown sugar, liquid sugar and syrup products. In response, C&H will introduce three new product lines and has recently invested \$10 million on new production and packaging equipment to modernize and streamline production. Providing employees the essential skillsets to develop, test, quality check and introduce new product lines, operate and maintain new machineries will increase organizational effectiveness in meeting customer demands.

Training Plan

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

Business Skills: Training will be offered to all occupations in Quality Systems for New Initiatives and Strategic Growth Development. Trainees will learn skills to establish quality management systems to improve internal processes, lower administrative costs, maximize existing value, create new value, and develop new relationships while galvanizing existing clients.

Computer Skills: Training will be offered to Administrative/Support Staff and focus on the new SAP software platform, SuccessFactors, to improve workforce analytics, insights and decision-making processes, and streamline Human Resources processes.

Manufacturing Skills: Training will be offered to Supervisor/Manager, Production and Technical Staff in Automated Manufacturing Systems, Electrical, and Manufacturing Equipment Cross-Training. Training will allow the Company to meet new product production demands, increase production speed and reduce equipment downtime.

Continuous Improvement: Training will be offered to all occupations and focus on improving processes by embedding best practices throughout the company structure, generating solutions that will save time, money and resources while reducing waste.

Productive Laboratory

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

PL will demonstrate proper ways to operate manufacturing equipment, make needed adjustments to processes as different production issues come up, change over the equipment when needed, and perform troubleshooting & maintenance. Certain functions can only be performed in a live setting and are not available in a simulated lab environment and cannot be replicated in a Class/Lab environment.

Each piece of equipment (Thiele Cooling Tower, Dust Collectors, Industrial Bagger, Metal Detector and other Production equipment) requires a minimum of 80 hours of on-the-job training (some as long as 4-6 weeks) before employees have the skills necessary to operate the machines autonomously.

C&H Sugar will deliver approximately 80 hours of PL-Manufacturing Skills training to 42 Production and Technical Staff. The training will be delivered by in-house subject matter experts with a trainer-to-trainee ratio of 1:1. To support its request, the company has provided Staff a comprehensive checklist of tasks required to meet competencies, which has been reviewed to ensure its training plan is in line with the higher PL hours.

Commitment to Training

C&H Sugar currently spends \$30,000 annually per facility in California. Training includes HR compliance-related training, CPR/First Aid, sexual harassment prevention, employee orientation, safety, sugar chemistry and basic computer skills.

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

➤ Training Infrastructure

The Senior Human Resources Manager will oversee the training project and manage internal administrative responsibilities. The Plant Manager, Assistant Plant Manager, and Department Manager are aware of this training endeavor and will provide any necessary support. A third-party Administrative Subcontractor will perform tasks for enrollment and tracking. Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by C&H Sugar under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0454*	Crockett	05/19/15 – 05/18/17	\$79,000	\$54,483 (69%)
ET12-0329	Crockett	04/02/12 – 04/01/14	\$223,200	\$68,775 (31%)

* ET15-0454: Poor performance was due to the 60 hours per trainee cap on PL hours. Much of the training in the last contract could not be replicated in a Class/Lab environment and needed to be delivered on-the-job. C&H Sugar documented 890 hours of training performed in an on-the-job setting above what was permitted for reimbursement in the contract. The Company was able to deliver training, but this training was not able to be captured for reimbursement. Had the PL training been included, the Company would have earned approximately 90% of the contract amount.

DEVELOPMENT SERVICES

Prospect Consulting Group, Inc. in San Francisco assisted with development for a flat fee of \$2,200.

ADMINISTRATIVE SERVICES

Prospect Consulting Group, Inc. will also perform administrative for a fee, not to exceed 13% of payment earned.

TRAINING VENDORS

To Be Determined

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

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Quality Systems for New Initiatives
- Strategic Growth Development

COMPUTER SKILLS

- SAP SuccessFactors

CONTINUOUS IMPROVEMENT

- Lean Manufacturing Processes
 - 5S Workplace Organization
 - Autonomous Maintenance
 - Leader Standard Work
 - Operator Standard Work
- Reliability Centered Maintenance
- Safe Quality Food Certification

MANUFACTURING SKILLS

- Automated Manufacturing Systems
- Electrical Technician Training
- Manufacturing Equipment Cross-Training
 - Bemis Equipment
 - Brown Carton Equipment
 - Brown Clear Pack Equipment
 - Boiler Equipment
 - Bosch Equipment
 - Bulk Products Equipment
 - Clarifying Equipment
 - Cooling Tower Equipment
 - Drivert Equipment
 - Dust Collector Equipment
 - Elba Equipment
 - Evaporator Equipment
 - Filter Press Equipment
 - Gable Top Equipment
 - Granulating Equipment
 - Hesser Equipment
 - Industrial Bagger Equipment
 - Liquor Gallery Equipment
 - Melt House Equipment
 - Metal Detector Equipment
 - Other Production Equipment
 - Packing Equipment
 - Palletizer Equipment
 - Powdered Bulk Equipment
 - Powdered Carton Equipment
 - Powdered Clear Pack Equipment

- Processing Equipment
- Pulverizing Equipment
- Rainbow Equipment
- Raw Clarifier Equipment
- Refining Equipment
- Ropack Equipment
- Remelt Centrifuge
- Soft Bulk Equipment
- Soft Sugar Head Equipment
- Sugar Boiler Equipment
- Supersack Equipment
- Velocitron Equipment
- Warehouse Equipment
- Waste Station Equipment
- New Equipment Operations
 - Cooling Tower
 - Dust Collectors
 - Industrial Bagger
 - Metal Detector
 - Other Production Equipment
- Power House Operations

Productive Lab Hours

0 - 80

MANUFACTURING SKILLS (Ratio 1:1)

- Automated Manufacturing Systems
- Electrical Technician Training
- Manufacturing Equipment Cross-Training
 - Bemis Equipment
 - Brown Carton Equipment
 - Brown Clear Pack Equipment
 - Boiler Equipment
 - Bosch Equipment
 - Bulk Products Equipment
 - Clarifying Equipment
 - Cooling Tower Equipment
 - Drivert Equipment
 - Dust Collector Equipment
 - Elba Equipment
 - Evaporator Equipment
 - Filter Press Equipment
 - Gable Top Equipment
 - Granulating Equipment
 - Hesser Equipment
 - Industrial Bagger Equipment
 - Liquor Gallery Equipment
 - Melt House Equipment
 - Metal Detector Equipment
 - Other Production Equipment
 - Packing Equipment
 - Palletizer Equipment

- Powdered Bulk Equipment
- Powdered Carton Equipment
- Powdered Clear Pack Equipment
- Processing Equipment
- Pulverizing Equipment
- Rainbow Equipment
- Raw Clarifier Equipment
- Refining Equipment
- Ropack Equipment
- Remelt Centrifuge
- Soft Bulk Equipment
- Soft Sugar Head Equipment
- Sugar Boiler Equipment
- Supersack Equipment
- Velocitron Equipment
- Warehouse Equipment
- Waste Station Equipment
- New Equipment Operations
 - Cooling Tower
 - Dust Collectors
 - Industrial Bagger
 - Metal Detector
 - Other Production Equipment
- Power House Operations

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



**SUGAR
WORKERS
UNION
LOCAL**

#1

641 Loring Avenue
P.O. Box 583
Crockett, CA 94525
(510) 787-1676
(510) 787-2788
FAX (510) 787-1776



February 27, 2018

To Whom It May Concern:

This letter is to express our support of C & H Sugar, Inc.'s application for funding with the State of California Employment Training Panel.

We anticipate that this program will enable the company to upgrade employee skills. The company anticipates increased employee retention and product quality, enabling them to remain competitive while growing their business, leading to greater job creation and security.

This letter has been emailed to Jill Nohl, Manager Human Resources, via Jill.Nohl@asr-group.com.

Sincerely,

Greg Lindke
SWU Local 1 President



Warehouse Union Local 6

INTERNATIONAL LONGSHORE & WAREHOUSE UNION

99 HEGENBERGER ROAD, OAKLAND, CA 94621-1485 • (510) 638-5605 • FAX: (510) 638-3297 

February 28, 2018

To Whom It May Concern:

This letter is to express our support of C & H Sugar, Inc.'s application for funding with the State of California Employment Training Panel.

We anticipate that this program will enable the company to upgrade employee skills. The company anticipates increased employee retention and product quality, enabling them to remain competitive while growing their business, leading to greater job creation and security.

This letter has been emailed to Jill Nohl, Manager Human Resources, via Jill.Nohl@asr-group.com

Sincerely,

Corey Tacconi

Corey Tacconi
Business Agent



DELEGATION ORDER

**Training Proposal for:
Fiore Di Pasta, Inc.**

Small Business

ET19-0195

Approval Date: July 19, 2018

ETP Regional Office: Sacramento

Analyst: K. Jones

CONTRACTOR

- Type of Industry: Manufacturing

 - Number of Full-Time Employees
 - California: 62
 - Worldwide: 62
 - Number to be trained: 50

 - Out-of-State Competition: NAICS Code Eligible
 - Special Employment Training (SET): Yes No
 - High Unemployment Area (HUA): Yes No
 - Turnover Rate: 8%
 - Repeat Contractor: Yes No
- Priority Industry: Yes No
- Owner Yes No

FUNDING

- Requested Amount: \$32,500
- In-Kind Contribution: \$35,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate HUA	Cont. Imp., Mfg. Skills, Literacy Skills, OSHA 10/30, PL-Mfg. Skills	50	8-60	0	\$650	\$12.53*
				Weighted Avg: 25			

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

- Reimbursement Rate: Job #1: \$26 SB Priority
- County(ies): Fresno
- Occupations to be Trained: Production Staff, Warehouse Staff, Maintenance Staff, Sanitation Staff, Supervisor
- Union Representation: Yes
 No
- Health Benefits: Job #1: Up to \$1.53 per hour

SUBCONTRACTORS

- Development Services: Patricia A. Trudeau, LLC of Fresno assisted with development for a flat fee of \$488.
- Administrative Services: Patricia A. Trudeau, LLC will also provide administration for a fee not to exceed 9.5% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1979 and headquartered in Fresno, Fiore Di Pasta, Inc. (Fiore) (fioredipasta.com) produces private label pasta noodles, meals and sauces for customers throughout the United States. Fiore’s products include Penne and Rigatoni noodles, pre-cooked Lasagna sheets, Braised Beef & Spinach Ravioli, Alfredo and Marinara Sauce. Customers include food manufactures, institutional food service companies, commercial restaurants and private-label food and sauce retailers. This will be Fiore’s first ETP Agreement. Training will take place at the Company’s Fresno location.

PROJECT DETAILS

Fiore has seen a 5% increase in product demand from several existing contracts over the last three years. To keep up with this demand, Fiore recently purchased several new pieces of machinery. This new equipment will allow Fiore to increase its product production, improve efficiency and productivity. Training on the new equipment will ensure trainees have the skills and knowledge to effectively use and maintain the equipment.

Fiore has also updated its internal Standard Operating Procedures (SOP) in an effort to increase production efficiencies and reduce production waste. The new SOP's will standardize internal processes and create consistency in production. Training is required to ensure trainees understand and follow the SOP's for production.

Training Plan

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

Continuous Improvement: Training will be offered to all occupations to improve product quality, production efficiency and ensure safe food practices. Training topics will include Basic Belts and Lean Production Philosophies, Train-the-Trainer, Quality Principles and Food Defense.

Literacy Skills: Training will be offered to select Production, Maintenance and Sanitation Staff based on need. The training is for staff whose language skills have been deemed a barrier to job advancement. The training will help staff increase their skills and promotional opportunities. Training will cover English as a Second Language Skills.

Manufacturing Skills: Training will be offered to all occupations to increase production efficiency, consistency and equipment knowledge. Training topics will include Production Principles, SOP, Mixing, Grinding and Blending Procedures, Tortellini Machinery and Packaging Procedures.

Certified Safety Training

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

Productive Laboratory

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

Fiore will train 35 Production and Maintenance Staff on production equipment for approximately 25 hours. Topics are delivered in the classroom first to introduce trainees to machinery and concepts. PL training is necessary to ensure safety and production standards are being met. Training will be at a much slower pace than regular production with significantly higher defects as trainees gain proficiency.

Training will be conducted by subject-matter experts who will first demonstrate use of equipment

and then supervise trainees. The trainer will confirm trainee competency once training is completed. Due to the size of manufacturing equipment, training cannot be reproduced in a classroom setting.

The Company requests a 1:3 trainer-to-trainee ratio since equipment requires three staff to operate.

Training Infrastructure

The Training Coordinator will oversee all administration. Additionally, The Company has retained Patricia A Trudeau, LLC, to assist with ETP administration. Training will be delivered by in-house experts and vendors as needed.

High Unemployment Area

All trainees are in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. The Company's location in Fresno County qualifies for HUA status under these standards.

➤ Wage Modification

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25% if post-retention wages exceed the start-of-training wages. The Company is requesting a wage modification from \$16.70 to \$12.53 per hour for the trainees in Job Number 1.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60

Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- Basic Belts and Lean Production Philosophies
- Food Defense
- Quality Principles
- Train-the-Trainer

MANUFACTURING SKILLS

- Convayer
- Food Safety
- Mixing, Grinding and Blending Procedures
- Packaging Procedures
- Production Principles
- Sorter Procedures
- Standard Operating Procedures
- Tortellini Machinery

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10
- OSHA 30

LITERACY SKILLS

- English as a Second Language Skills

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

Productive Lab Hours

0-25

MANUFACTURING SKILLS (Ratio 1:3)

- Conveyor Shoot
- Cooker/Water Basin
- Dying Process
- Hopper
- Mixer
- Packaging
- Pasta Roll Machine
- Sorter
- Spiral Chill Freezer

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



**Training Proposal for:
Haskell & White LLP**

Small Business

ET19-0144

Approval Date: July 18, 2018

ETP Regional Office: San Diego

Analyst: C. Clady

CONTRACTOR

- Type of Industry: Services

 - Number of Full-Time Employees
 - California: 85
 - Worldwide: 85
 - Number to be trained: 61

 - Out-of-State Competition: Competitors Outside CA
 - Special Employment Training (SET): Yes No
 - High Unemployment Area (HUA): Yes No
 - Turnover Rate: 2%
 - Repeat Contractor: Yes No
- Priority Industry: Yes No
- Owner Yes No

FUNDING

- Requested Amount: \$72,956
- In-Kind Contribution: \$115,835

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100	Business Skills Commerical Skills Computer Skills	61	8-150	0	1,196	\$17.03
				Weighted Avg: 46			

- Reimbursement Rate: Job #1: \$26 SB Priority
- County(ies): Orange, San Diego
- Occupations to be Trained: Staff Accountant, Senior Accountant, Manager, Senior Manager, Director, Operations Staff
- Union Representation: Yes No
 No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Training Refund Group (TRG) in Anaheim assisted with development for a flat fee of \$3,000.00
- Administrative Services: TRG will also provide administrative services for an amount not to exceed 13% of payment earned
- Training Vendors: To Be determined

OVERVIEW

Founded in 1988, Haskell & White LLP, (Haskell & White) (<http://www.hwcpa.com>), is an independently owned accounting and business advisory firm. The Company is headquartered in Irvine, with an additional office in San Diego. Both locations will participate in training. Haskell and White provides auditing, accounting, tax and business advisory services to real estate, manufacturing and distribution, life sciences, and technology companies.

This is the second project for Haskell & White. The Company has grown 15% per year. To remain competitive the Company must improve operations. Training in this proposal will focus on significant changes to the tax laws in 2018 as well as software updates. While some training is similar to the prior project, no trainee will receive duplicate training.

There have been significant changes to tax regulations that impact Haskell & White’s clients and require trainees be trained. Audit training will also be provided. The Company is continually

training on new requirements from financial institutions, the Securities and Exchange Commission, Financial Accounting Standards Board and other regulatory agencies. Haskell and White must also provide business skills training. Training will enable the Company to meet client demands and remain competitive.

Training in this project does not support the attainment of a CPA license or include continuing education training needed to maintain CPA licensure or other professional certifications.

Training Plan

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

Business Skills - Training will be provided to Junior staff to improve their business skills to advance within the Company. Training will be in Communication, Conflict Resolution, Best Practices, Networking Skills and Leadership Training.

Commercial Skills - Training will be offered to all occupations. The Internal Revenue Service and regulatory agencies are continuously changing compliance rules. Trainees need to understand changes in accounting and tax rules from year to year. They also have to understand the planning aspects of changes to law or new interpretations of existing law in order to provide beneficial services

Computer Skills – Training will be provided to all occupations. Trainees will learn Accounting and tax software application skills. Trainees will also receive advanced MS Office skills to be able to create databases, spreadsheets, reports, charts, graphs, and professional presentation materials.

Waivers

Two- Year Contract term:

The Company requests a 2-year term. Most training will only be delivered May through August and again from October through January during the off-peak tax periods. A two-year term will enable Haskell & White to deliver necessary training.

Maximum Hours/ Trainee Hours

Haskell & White requests 150 hours for training. In December 2017 the largest tax law change in the last 100 years was enacted. As a result the Company is implementing a massive training effort over the next 3 years, where some accountants and operational staff will receive over 60 hours of training. In the prior Agreement the Company provided training hours in excess of the maximum funded Agreement amount, whereas one third of staff received in excess of 60 hours. As such, Haskell & White has demonstrated the capacity to provide trainees with over 60 hours of training. Although Haskell & White is requesting a waiver to the 60-hour cap, the total weighted average per trainee proposed is 46 hours.

➤ Training Infrastructure

Training will be provided by in house trainers and vendors when necessary. The Partners will coordinate the project. Administrative staff will assist with project administration. Training Refund Group will also assist with project administration.

PRIOR PROJECTS

The following table summarizes performance by Haskell & White LLP under Active ETP Agreement.

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16- 0435	San Diego	5/2/16 -5/1/18	\$49,324	\$41,0250 (83%)

Based on ETP Systems 2431 hours have been tracked for potential earnings of \$49,324 (100% approved amount). The final closeout was submitted 6/11/18 and is being processed by ETP with projected final earnings of 100%.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-150 Trainees may receive any of the following:

BUSINESS SKILLS

- + Leadership Training
- + Marketing
- + Communication
- + Critical Thinking skills
- + Conflict Resolution
- + Networking Skills
- + Managing Growth
- + Presentation Skills
- + Best Practices

COMMERCIAL SKILLS

- + Accounting & Auditing Update
 - o Best Practices
 - o Auditing Fair Value
 - o New Revenue Recognition
 - o Senior Basics Series
 - o Staff Basics Series
 - o Real Estate Auditing
 - o Uniform Guidance Training
 - o Advanced Senior Training
 - o Book Ups / Step Ups
 - o Sampling, Materiality & Staff Accounting Bulletin 108
 - o Inventory Observation Training
 - o Internal Controls/Sarbanes Oxley Training
 - o Acquisitions of Property Entities
 - o Financial Accounting Standards 109--Tax Training for Auditors
 - o Fraud
- + Annual SEC Update
 - o SEC Quarterly Updates
- + Tax law updates
 - o Best Practices
 - o 1031 Exchanges
 - o Form 990: Non Profits
 - o Estate Training
 - o Basic Int'l Filings & Requirements
 - o Passive Activity Loss
 - o Tax Interest
 - o Tax Provisions

- Research & Development Tax Credit
- IRC Sections 451 & 461
- Foreign Reporting
- Tax Sensitive Investing

- ✚ Benefit Plan Training
 - Pension Planning

- ✚ Municipal Bond Market Today
- ✚ Best Practices & Projects
- ✚ Overview - All Things Partnerships
- ✚ Estimates/ Projections
- ✚ Form 1099 & Bond Reporting

COMPUTER SKILLS

- ✚ Tax software
 - Tax Research Accounting Skills
 - ProSystem fx tax software training
- ✚ Advanced MS Office
- ✚ Accounting and process software
 - Accelerated Workflow Automation software
 - ARM software training

Note: Reimbursement for retraining is capped at 150 total hours per-trainee, regardless of method of delivery.

DELEGATION ORDER



**Retrainee - Job Creation
James E. Williams and Son, Inc.**

Small Business

ET19-0188

Approval Date: July 19, 2018

ETP Regional Office: Sacramento

Analyst: D. Jordan

CONTRACTOR

- Type of Industry: Construction

- Priority Industry: Yes No

- Number of Full-Time Employees
 - California: 47
 - Worldwide: 47
 - Number to be trained: 64

- Owner Yes No

- Out-of-State Competition: Competitors Outside CA
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 12%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$52,130
- In-Kind Contribution: \$116,302

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB <100	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat, Mgmt. Skills, OSHA 10/30, PL-Commercial Skills	47	8-60	0-2	\$780	\$16.70
				Weighted Avg: 30			
2	Retrainee Job Creation Initiative Priority Rate SB <100	Business Skills, Commercial Skills, Computer Skills, Cont. Improv., HazMat, Mgmt. Skills, OSHA 10/30, PL-Commercial Skills	17	8-60	0-2	\$910	*\$13.66
				Weighted Avg: 35			

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

- Reimbursement Rate: Job #'s 1 & 2: \$26 SB Priority
- County(ies): Placer
- Occupations to be Trained: Administrative Staff, Engineers, Estimators, Field Staff, Managers/Supervisors, Owner
- Union Representation: Yes
 No
- Health Benefits: Job #1: \$2.50 per hour Job #2: \$0.66 per hour

SUBCONTRACTORS

- Development Services: Sierra Consulting Services, Inc. of El Dorado Hills assisted with development of this proposal for a flat fee of \$5,000.
- Administrative Services: Sierra Consulting Services, Inc. will also perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

INTRODUCTION

Founded in 1987 and headquartered in Rocklin, James E. Williams and Son, Inc. (James E. Williams) (www.jwandson.com) is a construction company specializing in tenant improvements within occupied housing developments and multi-family home owners associations. James E. Williams provides a variety of services including emergency repairs, dry rot, construction, painting and pest report repairs. Customers include homeowners associations, custom home builders, and condo and townhome owners. Training will take place at James E. Williams's sole location in Rocklin. This is James E. Williams first ETP project.

Need For Training

With the stabilizing housing market and improving economy, James E. Williams has seen an increased demand for its services. To help the Company meet these demands, training will focus training on the fundamentals of construction and specialized techniques such as roof replacement. Cross training staff will be provided on building repair and reconstruction. In addition, the Company implemented a series of continuous improvement changes and procedures.

Training will also focus on computer skills including, Intermediate and Advanced Microsoft Office, Quickbooks, and Autodesk/AutoCAD. James E. Williams' Management staff will receive training on Leadership, Financial Analysis, Negotiating and Operational Skills.

Retrainee – Job Creation

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

With the improving economy, the Company expects to grow over next few years and will hire 17 trainees that include Administrative Staff, Estimators, Field Staff, and Managers/Supervisors (Job Number 2) to meet business capacity. The Company currently lacks workers to complete current jobs and a backlog of projects. Newly hired workers will allow James E. Williams to handle the increased demand for their services. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

PROJECT DETAILS

Training Plan

Class/Lab, Productive Lab, and Computer Based training will be provided by in-house subject matter experts in the following:

Business Skills: Training will be delivered to all occupations. Training will focus on communication skills, business writing, time management and operational skills. Topics will include Negotiating, Relationship Building, Financial Analysis, Customer Service and Planning and Organization.

Commercial Skills: Training will be delivered to all Staff except the Owner. Training will focus on updated specialized techniques that staff will be using when completing their job duties. Training topics will include Drywall Repair and Installation, Lath/Shear Repairs, and Blueprint Reading and Schematics.

Computer Skills: Training will be delivered to Administrative Staff, Managers/Supervisors and Owner. Training will focus on new computer and software updates to ensure staff works efficiently. Topics will include AutoDesk/AutoCAD, Financial Management System, Quickbooks, Intermediate and Advanced Microsoft Office.

Continuous Improvement Skills: Training will be delivered to all occupations. Training will focus on changing internal infrastructure and processes so James E. Williams can grow as a company more efficiently. Training topics include Team Building, Process Improvement, Creating a Quality Organization, and Cross Training.

Hazardous Materials Skills: Training will be delivered to Managers/Supervisors and Field Staff. Training will focus on the understanding of materials and disposal methods. This training is highly technical and meets all industry and OSHA governmental standards. Topics will include Asbestos Removal, Rust Removal, and Restoration/Remediation of Mold.

Management Skills: Training will be delivered to Managers/Supervisors and Owner. Training will focus on leadership and organization. Training topics will include Effective Meetings for Leaders, Leadership, Strategic Planning, and Supervisor Skills.

Certified OSHA Safety Training

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

Productive Laboratory (PL) -Commercial Skills

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

Training will be delivered to Field Staff and Managers/Supervisors. Trainees will work with a trainer who will explain and demonstrate step-by-step instructions, then observe while trainees perform these tasks. Training will consist of courses in Drywall Repair, Demolition, Electrical, Equipment Operation, Finish Carpentry Repairs, Forklift, Hydraulics, Stucco Repair and Water Damage Repair. Production will be affected because the Company wants to make sure that they are delivering the best quality of work. James E. Williams will provide up to 24 hours of PL-Commercial skills training at a 1:1 trainer-to-trainee ratio.

Commitment to Training

James E. Williams allocates approximately \$60,000 annually for training that includes new-hire orientation, staff development and safety training. ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

James E. Williams has a detailed training plan in place and is ready to begin training upon approval. The Company's Vice President and two administrative staff members will oversee this training project. In addition, the Company has retained the services of a third party administrative subcontractor to assist with administration. Training will be delivered by in-house experts, and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Accounting
- Business Communication
- Business Fundamentals
- Business Writing
- Behavior Style Strategies
- Conflict Resolution
- Customer Relationship Management
- Customer Service
- Communication styles
- Cost Control
- Dealing with Difficult People
- Develop Employee Accountability
- Employee Coaching
- Employee Engagement
- Essential Skills for New Supervisor
- Financial Analysis
- Financial Forecasting & Budgeting
- Interpersonal Communications
- Leadership
- Marketing/Sales Techniques & Strategy
- Negotiating
- Operational skills
- Organizational Structure Development
- Planning and Organization
- Project Management and Methodology
- Project Requirements Analysis and Specifications
- Property and Resource Management Skills
- Retaining Customers
- Relationship Building
- Time Management

COMMERCIAL SKILLS

- Architectural Basics
- Blue Print Reading and Schematics
- Building Systems
- Construction Job Site Sequencing
- Construction Methodologies
- Construction Reports
- Construction Team Support
- Demolition
- Drywall Repair & Installation
- Electrical
- Engineering Theory/Planning/Design
- Equipment Operation

- Compressor/Generator
- Nail Guns
- Air Sprayers
- Soldering
- Welding
- Saws
- Finish Carpentry Repairs
- Forklift
- Hydraulics
- Inventory Control
- Job Site Preparation
- Kitchen and Bathroom Plumbing Systems
- Kitchen and Bathroom Sink Installation
- Lath/Shear Repairs
- Paint Matching
- Painting / Blending Techniques
- Plan Reading and Application
- Product Knowledge
- Remediation Assessment
- Rough Carpentry Repairs
- Setting Containments
- Stucco Repairs
- Telecommunications
- Troubleshooting
- Warehousing
- Water Damage Repair
- Water Test
- Work Order Processing

COMPUTER SKILLS

- Autodesk/AutoCAD
- Estimator Software
- Financial Management System
- Intermediate/Advanced Microsoft Office
- Quickbooks

CONTINUOUS IMPROVEMENT

- Cross Training
- Communication Skills
- Creating a Quality Organization
- Change Management
- Decision Making
- How to Coach and Mentor
- Kaizen
- Leadership
- Lean Manufacturing
- Meeting Management
- Process Improvement
- Production Scheduling
- Production Operations/Workflow
- Process Improvement

- Project Management
- Problem Solving and Decision Making
- Process Capability
- Quality Measurement Systems
- Root Cause Analysis
- Statistical Process Control
- Systems Failure Analysis
- Team Building
- Teamwork Development Skills
- Time Management

HAZARDOUS MATERIALS

- Asbestos Removal
- Hazardous Materials Handling
- Restoration/Remediation – MOLD
- Rust Removal

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Administration
- Coaching Procedures
- Decision Making
- Effective Meetings for Leaders
- Finance for Technical Managers
- Leadership
- Motivation
- Strategic Planning
- Supervisor Skills
- Teambuilding

OSHA 10/30 (With OSHA Certified Instructor)

- OSHA 10
- OSHA 30

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

PL HOURS

0 – 24

COMMERCIAL SKILLS (LIMITED RATIO 1:1)

- Blue Print Reading and Schematics
- Construction methodologies
- Demolition
- Drywall Repair and Installation
- Emergency Service
- Electrical
- Equipment Operation
 - Compressor/Generator
 - Nail Guns
 - Air Sprayers
 - Soldering
 - Welding
 - Saws

- Finish Carpentry Repairs
- Forklift
- Hydraulics
- Lath/Shear Repairs
- Paint Matching
- Painting / Blending Techniques
- Plan Reading and Application
- Remediation Assessment
- Rough Carpentry Repairs
- Setting Containments
- Stucco Repairs
- Water Damage Repair
- Water Test

CBT HOURS

0 – 2

COMMERCIAL SKILLS

- Back Safety Basics & Update - 30 Min
- Hand and Power Tool Safety - 1 Hour
- Power Saw Safety - 30 Min

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



TRAINING PROPOSAL FOR

Kamus Keller, Inc.

18-0581

Approval Date: July 27, 2018

Regional Office: North Hollywood Regional Office

Analyst Name: Marisol Niquet

Type of Proposal: Single Employer (SB), Small Business Program

Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 20,358.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 20,368.00	N/A	\$ 0.00	\$ 55,640.00

APPLICANT PROFILE

Company Summary	Kamus Keller, Inc., (Kamus Keller) is an architecture and interior design company that develops customized and innovative project solutions for both commercial and residential purposes.
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Industry Sector(s)	Professional, Scientific, and Technical
Priority Industry	Yes
No. Employees (Applicant)	State: 40 US: 40 World Wide: 40
Turnover Rate (Applicant)	5.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will enable trainees to identify sustainable features to provide clients the best cost benefit and earliest return on client projects.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	27	\$ 26.00	29	\$ 754	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2005 and headquartered in Long Beach, Kamus Keller, Inc., (Kamus Keller) develops customized architecture and interior design project solutions for both commercial and residential customers. Customers include Hudson Pacific Hollywood leasing office, Hollywood chamber of commerce, Catalina Landing, Lyon Stahl, Deliteful, Believe Media, Opentable, World Vision International, Waltzman Plastic and Reconstructive Surgery, Tax Credit Company and Beachbody.

2. Current Training Project Details

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

Purpose of Training	<p>As the economy continues to stabilize, Kamus Keller finds itself in fierce competition for talented workers. Strengthening the Company's training program and offering robust skill development is key to employee retention.</p> <p>The main production aid for Kamus Keller has been Computer-aided design and drafting (CADD). However, CADD is becoming an outdated tool. The Company is transitioning to Sketchup. This transition requires retraining production staff from 2 dimensional to 3 dimensional work and an understanding of Building Information Modeling (BIM). BIM also enables the Company to broaden service offerings and move from traditional 2D to more relevant 3D deliverables: 3D modeling, walk troughs, real time rendering, etc.</p> <p>Technology continues to impact the business. Kamus Keller must reinvest in their design aids and retrain in more efficient, comprehensive and impactful ways of delivering their goods and services.</p> <p>Business Skills training will be offered to all occupations to improve client relations and interpersonal communication, improve administration of contracts, financial reporting and profitability, improve presentation skills, close more sales, increase trainee Product and Service Knowledge, and streamline project Management processes.</p> <p>Commercial Skills training will be offered to Job Captains/Designers, Project Leads and Supervisors/Managers, enabling staff to communicate with customers regarding building code and updates, process change orders, report on latest trends in corporate and workplace Design and projects.</p> <p>Computer Skills will be offered to all occupations. This training will</p>
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PROPOSED TRAINING PROJECT DETAILS

	<p>help trainees to update core business processes using common databases maintained by a database management system. ERP systems track business resources, materials, production capacity and the status of business commitments: orders, purchase orders, and payroll.</p> <p>Training will take place in the Company's multiple locations in Long Beach and San Ramon by in-house subject matter experts and vendors in specialized topics as needed.</p>
Training Infrastructure and Administrative Plan	<p>Kamus Keller spends an estimated \$65,500.00 annually on training. The Company currently provides on-the-job training related to specific job functions. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.</p> <p>The Company's Human Resources Director will oversee the training project. The Company has also retained an administrative subcontractor to ensure that training administration and documentation adhere to ETP requirements.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
<p>All occupations will receive training in Business Skills and Computer Skills as shown in detail on Attachment "2" of the proposal.</p> <p>Job Captains/Designers, Project Leads and Supervisors will receive training in Commercial Skills as shown in detail on Attachment "2" of the proposal.</p>	

PROPOSED TRAINING PROJECT DETAILS

4. Additional Company or Training Project Details

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$ 1,900
Administrative	Training Funding Source	Seal Beach	13% of funds earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Business Strategy
	Client relations
	Communication
	Contract Management
	Financial Reporting
	Presentation
	Product and Service Knowledge
	Project Management
	Sales Process
	Working with Others
Commercial Skills (Standard)	Building Code/Code Updates
	Change Orders
	Corporate and Workplace Design
	Project Reporting
	Real Estate Due Diligence
Computer Skills (Standard)	360-degree cameras
	Adobe Creative Suite
	Building Information Modeling
	Computer Assisted Drawing and Standards
	Database Management
	ERP
	Microsoft 365
	Point cloud
	Project Information Management
	SketchUp



DELEGATION ORDER

**Training Proposal for:
KBKG, Inc.**

Agreement Number: ET19-0190

Approval Date: July 19, 2018

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

PROJECT PROFILE

Contract Attributes:	Retrainee	Industry Sector(s):	Services Financial Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 115	U.S.: 145	Worldwide: 145
<u>Turnover Rate:</u>	10%		
<u>Managers/Supervisors:</u> (% of total trainees)	6%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$74,888		\$0	\$0		\$74,888

In-Kind Contribution:	100% of Total ETP Funding Required	\$100,904
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee	Business Skills, Comm'l. Skills, Computer Skills	88	8-200	0	\$851	\$17.54
				Weighted Avg: 37			

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

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

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

Up to \$1.54 per hour may be used to meet the Post-Retention Wage.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Accountants		56
Business Development		6
Administration		26

INTRODUCTION

Established in 1999, KBKG, Inc. (KBKG) (www.kbkg.com) provides turn-key tax solutions to Certified Public Accountants (CPA) and businesses. The Company also offers services in research & development tax credits, cost segregation studies, tangible property regulations, fixed asset depreciation reviews, innovative solutions and property tax reviews. Customers include exempt organizations, healthcare services, energy services, manufacturing, construction and distribution. This is KBKG's first Agreement.

KBKG has offices in Pasadena, Woodland Hills, Sacramento and Valencia. Training will be provided to employees at the Pasadena and Woodland Hills locations; and its affiliate KROST CPA's and Consultants (KROST). KROST is located in the same KBKG facility in Pasadena. KROST shares the same training needs as KBKG.

PROJECT DETAILS

In an effort to provide customers with quality service and remain competitive, staff must be knowledgeable of current accounting rules, tax issues and business plans. CPA's average over 50 hours a year in training to remain current on tax law and regulatory changes passed by federal, state and local governments. This training is needed to address many accounting rules boards, including Generally Accepted Accounting Principles, Financial Accounting Standards Board the Securities Exchange Commission. Each of these organizations publish changes to the accounting and audit rules which accountants must adhere. Training outlined in this Proposal does not include required training for Continuing Professional Education (CPE) as may be required for CPA's.

KBKG also helps its client's companies grow. The business consulting helps the companies develop and implement new business plans. It also provides detailed financial information that lenders need to provide the funding needed for companies to grow and expand.

Training Plan

Training delivery methods will include Class/Lab and E-Learning. While KBKG will predominantly use Class/Lab as a training method, some training may occur simultaneously at two KBKG locations, at which time the Company may utilize E-Learning.

Business Skills: Training will be offered to all occupations in skills to provide quality customer service, improve customer relationships, and deliver informed presentations and recommendations.

Commercial Skills: Training will be offered to Accountants and Business Development staff in Auditing & Tax Updates and Governmental Compliance to enable workers to stay current and keep clients in compliance with regulatory changes. Accounting staff will learn new interpretations of existing laws to provide the best benefit to customers.

Computer Skills: Training will be offered to all occupations in QuickBooks, Intermediate Microsoft Office and new versions of internal software. This training will improve productivity by enabling employees to effectively create databases, spreadsheets, reports, charts, graphs and professional presentation materials.

Commitment to Training

KBKG spends approximately \$97,000 annually on training at its California facilities and includes introductory computer skills, company policies and procedures, new employee orientation, partner training and anti-harassment.

➤ Training Infrastructure

The Director of Education will oversee internal training and project administration. Some administrative functions to other staff during the project term. Staff will be designated to facilitate training at each location. In addition, the Company has retained Training Refund Group to ensure that all training records adhere to ETP requirements. Training will be delivered by in-house experts and vendors as needed.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

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

ADMINISTRATIVE SERVICES

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

TRAINING VENDORS

To Be Determined

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

8 - 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Leadership Training
- Marketing
- Communication
- Conflict Resolution
- Networking Skills
- Presentation Skills
- Sales Skills

COMMERCIAL SKILLS

- Audit and Tax Best Practices
- Accounting and Auditing Updates
- Employee Retirement Income Security Act
- Employee Benefit Plans
- Tax Updates
- Tax Incentives

COMPUTER SKILLS

- QuickBooks
- Tax Software
- Intermediate Microsoft Office
- Audit Management Software
- Case Tracking Software

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:**

KC Partners Corp. dba B&T Service Station Contractors

Small Business

ET19-0220

Approval Date: August 10, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

CONTRACTOR

- Type of Industry: Construction

- Number of Full-Time Employees
 - California: 30
 - Worldwide: 30
 - Number to be trained: 35

- Out-of-State Competition: No OSC
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 10%
- Repeat Contractor: Yes No

- Priority Industry: Yes No

- Owner Yes No

FUNDING

- Requested Amount: \$31,200
- In-Kind Contribution: \$34,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SET SB <100 Priority Rate	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., Mgmt. Skills, PL-Comm'l. Skills	30	8-60 Weighted Avg: 30	0	\$780	\$22.77
2	Priority Rate SET SB <100 Job Creation Retrainee	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., PL-Comm'l. Skills	5	8-60 Weighted Avg: 60	0	\$1,560	*\$13.66

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

- Reimbursement Rate: Job #s 1 & 2: \$26 Small Business Rate
- County(ies): San Luis Obispo
- Occupations to be Trained: Administrative Staff, Construction, Dispatch, Estimator, Field Service Technician, Manager, Owner, Sales Staff, Warehouse Staff
- Union Representation: Yes
 No
- Health Benefits: Job #1: \$2.20 per hour Job #2: \$0.16 per hour

SUBCONTRACTORS

- Development Services: Strategic Business Solutions, LLC, Visalia, assisted with development for a flat fee of \$2,179.
- Administrative Services: Strategic Business Solutions, LLC will also provide administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: Donn Gable, Fresno, will provide Commercial and Computer Skills. Other vendors to be determined

OVERVIEW

Founded in 1980 and located in Nipomo, KC Partners Corp. dba B&T Service Station Contractors (KC) (www.btsc.com), provides fueling station related construction services in commercial retail and government sectors. Training will take place at its sole facility in Nipomo.

PROJECT DETAILS

To remain competitive, KC must train staff in technological upgrades including new point of purchase processes for Point of Sales systems. Additionally, the Company recently invested (estimated \$60K) in new equipment such as SAGE 100 Software (EPR system), Case Backhoe (Excavation equipment) used to manage and complete construction projects.

ETP-funded training will:

- Support company growth by gaining and training new workers for high skilled positions;
- Upgrade skills in Lean to reduce waste in areas such as Purchasing; and
- Increase capacities and efficiencies in bidding based on needs found in formal assessments concluded by Managers. KC represents this training is expected to increase accuracy, improve customer service, and lead to greater profitability.

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Trainees will be subject to a lower post-retention wage. Trainees must be hired within the three-month period prior to Panel approval or during the term of contract.

KC has committed to hiring five net new employees (Job Number 2) over the next 21 months to handle company growth during the term of the agreement. KC has ample space to accommodate new employees.

KC is experiencing an estimated increase of 10% in client projects and revenues in year over year comparisons. Thus, the Company has plans to hire to support construction projects. Hiring and training is paramount to prevent interruptions in operations and project timelines. Specifically, KC is expanding existing business capacity by adding newly hired employees to an existing function.

The Company recently invested in new equipment such as SAGE 100 Software (EPR system), which is used to manage and complete construction projects. New Service Technicians and Warehouse Staff will be trained on this new ERP system.

Training Plan

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

Business Skills: Training will be offered to all occupations. Customer service training will increase account development and meet increased market share goals. Topics such as financial management, strategic planning, estimating and bidding, purchasing and project management all support KC's assessed efficiency goals to improve service delivery and quality.

Commercial Skills: Training will be offered to Field Service Technicians, Construction, Warehouse Staff and Managers. Changes in the Fuel Dispensing Systems and Electronic Control Panels being installed and repaired requires skill update training. Additionally, loading, transporting and management of equipment requires Warehouse Staff to be trained to increase efficiency. Topics will include material handling, excavation equipment and electronic control panels.

Management Skills: Training will be offered to Managers and the Owner in coaching on strategies to develop employees, provide career ladder opportunities, increase morale and aims to further increase the retention of employees as the company continues grow.

Computer Skills: Training will be offered to all occupations. Topics will include SAGE 100 ERP Software, Felix Inventory Control, Procore Construction and Intermediate MS Office. This training is deemed critical for billing, project management and improving communications overall to customers. Computer-Assisted Drawing will be offered to advance the technical expertise of Managers and Estimators who produce the drawings.

Continuous Improvement: All occupations will receive training to develop efficiency. Staff will be able to make decisions and take immediate action, resulting in a greater attention to detail, error reduction and a reduction in customer response time. Lean training will be provided to ensure quality standards are met for various customer and industry requirements. Leadership training will focus on development of front-line staff to increase upward mobility within the Company and to meet KC's expansion goals.

Productive Laboratory

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

KC estimates that Construction Workers and Field Service Technicians will receive up to 7 hours of PL training in Commercial Skills. An experienced trainer will specify the scope of work, explain the process and needed equipment, and verify that the trainee understands standards and specifications. The trainer will observe the employee(s) 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 reaches competency only.

The company requests a trainer-to-trainee ratio of 1:2 because it is common for tasks to be performed in teams at worksites to safely use equipment. Only 50% of the PL training will be at this ratio. The other half will be delivered at a 1:1 ratio.

Commitment to Training

KC's annual training budget is currently \$25,000 and includes new-hire basic computer skills, basic core technical training, on-the-job and safety training. ETP funds will not displace the existing financial commitment to training. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

KC has a training plan in place and is ready to begin upon approval. The Owner and Manager and two in-house trainers to coordinate all training. Strategic Business Solutions, LLC will assist with documentation and tracking. Training will be delivered by in-house experts with some customized training provided by vendors.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- + Account Development
- + Financial Management
- + Strategic Planning
- + Effective Communications
- + Estimating and Bidding
- + Purchasing Best Practices

COMMERCIAL SKILLS

- + Electrical Control Panels Installation and Troubleshooting
- + Forklift Training
- + Excavation Equipment Operation/Best Practices
- + Fuel Dispensing Systems Repair, Installation

COMPUTER SKILLS

- + SAGE 100 Software Training
- + Felix Software System Training
- + Procore Software System Training
- + System Training Chip Technology
- + Microsoft Applications (Excel, Project)
- + Computer Assisted Drawing Software (AutoCAD, CAD 3D)

CONTINUOUS IMPROVEMENT

- + LEAN Processes
- + Inventory Management
- + Leadership
- + Teambuilding
- + Mentoring

MANAGEMENT SKILLS (Manager/Owner Only)

- + Coaching

Productive Lab Hours

0-7

COMMERCIAL SKILLS

- + Excavation Equipment Operation/Best Practices

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

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

DELEGATION ORDER



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

Michael Martines Physical Therapist, Inc.

Small Business

ET19-0207

Approval Date: August 1, 2018

ETP Regional Office: Sacramento

Analyst: C. Kaiser

CONTRACTOR

- Type of Industry: Services
Healthcare
Priority Industry: Yes No

- Number of Full-Time Employees
California: 11
Worldwide: 11
Number to be trained: 13
Owner Yes No

- Out-of-State Competition: No OSC
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 9%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$16,120
- In-Kind Contribution: \$40,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	SET HUA SB <100 Priority Rate Medical Skills	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., MS-Didactic	8	8-60	0	\$1,040	\$12.53*
				Weighted Avg: 40			
2	SET Job Creation HUA SB <100 Medical Skills		5	8-60	0	\$1,560	\$11.00*
				Weighted Avg: 60			

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

- Reimbursement Rate: Job #'s 1 & 2: \$26 Small Business Rate
- County(ies): Fresno
- Occupations to be Trained: Administrative Staff, Owner, Physical Therapists, Physical Therapy Aides
- Union Representation: Yes
 No
- Health Benefits: Job #1: \$1.53 per hour

SUBCONTRACTORS

- Development Services: Strategic Business Solutions, LLC of Visalia assisted with development for a flat fee of \$1,201.
- Administrative Services: Strategic Business Solutions, LLC will also perform administrative services for a fee not to exceed 13% of payment earned.
- Training Vendors: To Be Determined

OVERVIEW

Founded in 2007 and headquartered in Fresno, Michael Martines Physical Therapist, Inc. (MMPT), specializes in physical therapy services including core strengthening, exercise, Ultrasound, Laser Therapy, Cryotherapy, Thermotherapy and Electrotherapy. The Company

serves clients throughout the Central San Joaquin Valley. Training will be conducted at the Company's two Fresno locations. This is MMPT's first ETP Agreement.

Need for Training

The Company assessed training needs for current employees and recognized areas that needed improvement. All staff will be trained on new electronic medical record software, The Office, effective communication and customer service. MMPT has also seen an increase in growth in the last year and is currently hiring additional employees. These employees will require extensive training.

In addition, the Company is adding new equipment including Alt G treadmills and a Class 4 Laser Light Force, which requires extensive training for the physical therapists and aides.

All staff will receive training on leadership, patient intake procedures and insurance protocols. Administrative Staff will receive training on conveying clear information (both written and verbal) to peers, patients and third party providers.

Retrainee – Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Trainees will be subject to a lower post-retention wage. The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Due to the increase in patients and the expansion of services offered at both locations, and new equipment, MMPT will hire five new full time permanent employees (Job Number 2). The new positions include two Administrative Staff and three Physical Therapists.

Training Plan

Training will be provide via Class/Lab in the following:

Business Skills: Training will be offered to all occupations, but will focus on Administrative Staff. Training will include customer service, communication, provider relations, insurance protocols and practice management.

Commercial Skills: Training will be offered to Physical Therapists and Physical Therapy Aides and focus on new equipment operations. Training topics include Alt G Treadmill and Laser Treatment Therapy - Light Force.

Computer Skills: Training will be offered to all occupations and focus on new software. Training topics include The Office Electronic Medical Records System and Microsoft Office Suite (Intermediate and Advanced).

Continuous Improvement: Training will be offered to all occupations and focus on leadership and teambuilding. Training topics include Quality Control Processes, Leadership and Teambuilding.

Medical Skills - Didactic: Approximately six Physical Therapists and two Physical Therapy Aides will participate in Medical Skills Didactic training. Classroom/laboratory training will be provided by in-house subject matter experts on advanced clinical processes to ensure competency and maximize patient satisfaction and safety. Training topics include Basic Life Support and Exercise Therapy.

Special Employment Training

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

➤ Wage Modification

All trainees work in Fresno county. These trainees are eligible for a wage modification to the ETP Minimum Wage rather than the Statewide Average Hourly Wage. MMPT requests a wage modification from \$22.77 per hour to \$12.53 per hour for trainees in Job Number 1 and from \$22.77 per hour to \$11.00 per hour for trainees in Job Number 2.

Commitment to Training

The Company averages about \$5,000 annually on training in job specific duties, HIPAA, policy and procedures, and changes in State/Federal Law for the medical profession. ETP funds will not displace the existing financial commitment to training.

➤ Training Infrastructure

MMPT has a detailed training plan in-place and is ready to begin training upon approval. The Owner and Administrators at both locations will oversee the ETP Contract. In addition to the assigned staff members, MMPT has also retained a third-party administrator with extensive ETP experience to assist with administration.

The majority of training will be provided by qualified in-house experts. The owner, and the Senior Physical Therapist will provide Medical Skills training. Training such as MS Office Suite and Effective Communication will be provided by third party vendors.

RECOMMENDATION

Staff recommends approval of this proposal.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

BUSINESS SKILLS

- Customer Service
- Effective Communication
- Insurance Protocols Authorization, Benefits, Billing
- Patient Intake Procedures
- Practice Management
- Provider Relations

COMMERCIAL SKILLS

- Alt G Treadmill
- Laser Treatment Therapy- Light Force

COMPUTER SKILLS

- MS Office Suite (Intermediate and Advanced)
- The Office Electronic Medical Records System

CONTINUOUS IMPROVEMENT

- Leadership
- Quality Control Processes
- Teambuilding

MEDICAL SKILLS - DIDACTIC

- BLS (Basic Life Support)
- Biomechanics
- Exercise Therapy- Patient Specific
- Manual Therapy- Upper and Lower Extremities
- Patient Assessment

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



DELEGATION ORDER

**Training Proposal for:
Perillo Industries, Inc. dba Century Electronics**

Small Business

ET19-0192

Approval Date: July 27, 2018

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

CONTRACTOR

- Type of Industry: Manufacturing
Priority Industry: Yes No
- Number of Full-Time Employees
California: 40
Worldwide: 40
Number to be trained: 21
Owner Yes No
- Out-of-State Competition: NAICS Code Eligible
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 16%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$18,564
- In-Kind Contribution: \$25,890

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate SB<100	Continuous Impr, Manufacturing Skills Computer Skills, OSHA 10	21	8-60	0	\$884	*\$16.70
				Weighted Avg: 34			

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

- Reimbursement Rate: \$26 SB Priority
- County(ies): Ventura County
- Occupations to be Trained: Engineering, Administration, Production, Owner
- Union Representation: Yes
 No
- Health Benefits: Up to \$2.50 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: OMNI Training in Rancho Cucamonga will provide training in IPC/J-STD.
Global Trade Compliance in Newport Beach will provide training in ITAR.

OVERVIEW

Founded in 1973 and headquartered in Newbury Park, Perillo Industries, Inc. dba Century Electronics (Perillo) (www.centuryele.com), designs and manufactures high-reliability custom and standard power supplies, converters and inverters for military, aerospace, space and industrial applications. Customers include Raytheon, Harris and Boeing. This will be the Company's sixth Agreement, the second in the last five years.

Need for Training

In response to customer demand, product specific requirements, and evolving government standards and regulations, employees must renew qualifications and update certifications to continue producing superior and reliable products. Perillo must maintain prime industry training

levels for their employees to produce quality products to compete. To achieve this, Perillo needs to provide continuous training to ensure employees possess upgraded skills. Employees will train on AS 9100, IPC 610 (Product Inspection) and J-STD-001 (Standards in Product Soldering), ITAR (International Traffic in Arms Regulations), OSHA 10/30 and Cybersecurity. Some of the training in this proposal was included in their prior Agreement but was not delivered to all trainees. In addition, AS9100, IPC 610, J- STD- 001 and ITAR had revision changes since the prior ETP Agreement. Trainees must be trained on these upgrades.

Training will also allow the Company to increase skills, as it plans to expand business into additional domestic and international markets while maintaining a strong presence in military markets.

Training Plan

All training will be delivered though Class/Lab at the Perillo facility in Newbury

Manufacturing Skills - This training will be offered to Production Staff (Assemblers, Technicians, and Inspectors) in product inspection and product soldering techniques and requirements.

Continuous Improvement - This training will be offered to all occupations. Trainees will receive standards outlined in IPC 610 and J-STD to achieve certification and recertification to properly administer and comply to client contracts. Training will also include updates on customer requirements involving product design, ITAR and OSHA 10 standards.

Computer Skills – This training will be delivered to all occupations. Training will cover topics in cybersecurity.

Certified Safety Training

1. 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. 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.

Temporary to Permanent Hiring

Perillo intends to train workers under Panel guidelines in the Temporary-to-Permanent program. The Company has retained these employees on a temporary basis with the intention of hiring them into full-time, permanent positions after training. The average time for “converting” temporary workers into full-time permanent employment is 6 months. These workers will receive employer-paid share-of-cost for healthcare premiums while on temporary status, and upon hire into full-time permanent employment.

Under Panel guidelines for the Temporary to Permanent program, these trainees must be eligible to participate in ETP-funded training pursuant to Unemployment Insurance Code Section 10201(c). Moreover, they cannot be enrolled as trainees until after they have been hired into full-time, permanent employment. Until they are so hired, retention and post-retention wage requirements cannot be satisfied and the Company will not receive progress payments.

➤ Training Infrastructure

The Company is ready to start training upon approval of the Agreement. Training will be provided by qualified trainers and third-party trainers. The Quality Manager will administer the project with assistance of Managers and Supervisors.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0118	Newbury Park	07/07/2014– 07/06/2016	\$41.470	\$26,272 (63%)

A downturn in business resulted in layoffs during the term of this Agreement, including Perillo's internal administrator who managed the ETP-funded training. This resulted in improper documentation of training hours. Training was eventually halted as managers were not properly informed of the scope of the project.

For this proposal, Perillo will include and involve all Managers and Supervisors in training projects so they are aware of the scope of the project, required trainee participation, and proper recordkeeping requirements. Administration will be headed by the Company's Quality Manager, with an employee from Human Resources and an internal Administration Analyst assisting.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

- IPC 610 RE-CERTIFICATION
- J-STD-001 RE-CERTIFICATION
- ITAR TRAINING

MANUFACTURING SKILLS

- IPC 610 – Product Inspection
- J-STD-001- Product Soldering
- OSHA10

COMPUTER SKILLS

- Cybersecurity

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



DELEGATION ORDER

Training Proposal for:

Tencate Advanced Composites USA, Inc.

Agreement Number: ET19-0185

Approval Date: August 9, 2018

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate	Industry Sector(s):	Manufacturing Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Solano, Santa Clara	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 316	U.S.:316	Worldwide: 3,600
<u>Turnover Rate:</u>	18%		
<u>Managers/Supervisors:</u> (% of total trainees)	9%		

FUNDING DETAIL

Program Costs	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$63,336		\$0	\$0		\$63,336

In-Kind Contribution:	100% of Total ETP Funding Required	\$337,700
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Continuous Impr	87	8-200	0	\$728	\$16.70
				Weighted Avg: 28			

Minimum Wage by County: Solano and Ventura Counties, \$16.70; Santa Clara County \$18.22.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Production Technicians		56
Quality Technicians		8
CSR Lead		5
Purchasing Lead		3
Quality Lead		2
Process Engineer		5
Manager		8

INTRODUCTION

Founded in 1990 as Bryte Technologies and acquired in 1999 by Royal TenCate Corporation (which was founded in 1704 in the Netherlands), TenCate Advanced Composites USA, Inc. (TenCate) (www.tencate.com) is a subsidiary headquartered in Santa Clara, California. If approved, two other California Tencate facilities will participate in the proposed training (Fairfield and Camarillo, California). This is TenCate's second ETP Agreement, the second in the last five years.

TenCate is a supplier of thermoplastic and thermoset composite materials for the aerospace and industrial advanced composite industries such as high performance Automotive and consumer electronics. The thermoset composites are used on satellites, radomes (enclosure that protects a radar antenna), unmanned aircraft, general aviation, and military aircraft. The Company also provides thermoset composites in high-end industrial and recreational applications ranging from oil and gas to prosthetics to sporting equipment. TenCate's facilities in Morgan Hill, Fairfield, and Camarillo, will participate in this training project. This proposal consists of 100% Continuous Improvement Skills training.

PROJECT DETAILS

TenCate's prior ETP agreement focused on implementation of a new ERP system and training key personnel to utilize the full capabilities of the software. Training also included Lean techniques to improve turnaround times (on fulfilling orders) and better inventory controls.

For this proposal, Tencate hired a vendor to conduct a training needs assessment. The assessment recommended improvements to operational efficiencies which can save the Company \$2.7 million. The proposed training will improve processes, shorten lead times, lower prices, reduce waste, and achieve higher performance. Employees will also obtain TBM Lean certification, a recognized industry standard. Training will support the Company's expanding business environment and growth objectives.

Training Plan

Training will be delivered via Classroom/Laboratory. The Company is ready to start training upon approval.

Continuous Improvement - This training will be offered to all occupations to reduce/eliminate waste, enable trainees to effectively respond to customer demands, add more flexibility and new skills through cross-training, and increase on-time delivery. The training will also include a train-the-trainer model to increase Lean certified employees. Training on new production lines and new equipment will also be provided.

Commitment to Training

Tencate's 2017 training budget is \$182,000 across three California facilities. Tencate's existing structured training covers new hire orientations, compliance training, required safety, and on-the-job training, all of which will continue to be provided.

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

Administration will be led by the V.P. of Finance. Tencate also designated three internal administrators (one for each site) to coordinate/facilitate training. Training will be delivered by in-house instructors and vendors. Tencate also has hired an experienced Administrative Subcontractor to assist with the Administration of the ETP contract.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET14-0106	Santa Clara	8/5/2013– 8/4/2015	\$99,000	\$63,336 *(64%)

*The prior agreement underperformed due to an ambitious training plan. In this new proposal, the average number of training hours has been significantly reduced to ensure successful completion of training.

DEVELOPMENT SERVICES

Tencate retained The Incentives Management Group in Westport, CT, to assist with development of this proposal for no fee.

ADMINISTRATIVE SERVICES

Tencate retained The Incentives Management Group in Westport, CT, to perform administrative services in connection with this proposal for a fee not to exceed 13% of payment earned.

TRAINING VENDORS









TBM Consulting of Durham, NC, has been retained to provide Continuous Improvement/Lean training for a fee of \$280,000. Other trainers will be identified for ETP record-keeping purposes, as they are retained by Tencate.

Exhibit B: Menu Curriculum

Class/Lab Hours

8-200 Trainees may receive any of the following:

CONTINUOUS IMPROVEMENT

-  Lean Overview
-  Changeover Reduction
-  Cycle Time Reduction
-  Business Process Improvement
-  Variation Reduction
-  Managing for Daily Improvement
-  Problem Solving Training
-  Facilitator Training

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

DELEGATION ORDER



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

**University Rx Specialists dba University Compounding
Pharmacy**

Small Business

ET19-0191

Approval Date: August 1, 2018

ETP Regional Office: San Diego

Analyst: C. Clady

CONTRACTOR

- Type of Industry: Retail
Services
Priority Industry: Yes No
- Number of Full-Time Employees
California: 93
Worldwide: 93
Number to be trained: 86
Owner Yes No
- Out-of-State Competition: OSC
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 18%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$46,124
- In-Kind Contribution: \$74,362

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., PL-Comm'l. Skills	83	8-60	0	\$520	\$17.03
				Weighted Avg: 20			
2	Retrainee SB <100 Job Creation	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., PL-Comm'l. Skills	3	8-60	0	\$988	*\$14.19
				Weighted Avg: 38			

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

- *Reimbursement Rate: Job #'s 1 & 2: \$26 SB Priority
- County(ies): San Diego
- Occupations to be Trained: Pharmacists, Technicians, Administration, Customer Service, Supervisor/Manager
- Union Representation: Yes
 No
- Health Benefits: Job #'s 1 & 2: Up to \$2.50 per hour

SUBCONTRACTORS

- Development Services: Training Funding Source (TFS) in Seal Beach assisted with development for a flat fee of \$2,900.00.
- Administrative Services: TFS will also provide project administrative services for an amount not to exceed 13% of payment earned.
- Training Vendors: To be determined

OVERVIEW

Founded in 1993 and located in San Diego, University Rx Specialists dba University Compounding Pharmacy (UCP) (www.ucprx.com) specializes in the formulation of medical and nutritional treatments not commercially available to the general patient population. Experienced Compounding Pharmacists prepare the prescriptions individually. University RX faces Out of State Competition.

This is UCP third ETP Agreement, and the third in the past five years. Previous training focused on new compliance requirements for clean rooms, including Hazardous Materials training for lab technicians.

This project's training will focus on mixing compounds in various form (liquid, solid). Compounding pharmacy regulations undergo constant revision and UCP need to transition from Good Compounding Practices to Good Manufacturing Practices (GMP). GMP will require UCP to change many of its current practices in order to comply with current FDA current guidelines and California State Laws. Employees must also be trained to mix formulations to meet customer allergies or sensitivities.

To meet its expanded business and market needs, UCP must have a skilled workforce to meet increased production demands. Specifically, to achieve these goals newly current and newly hired staff must receive training to comply with new and changing compounding pharmacy regulations.

In addition, UCP is in the process of developing an audit program to assist customer service representatives, shipping department, and front counter staff with customers' orders. Finally, technicians will be trained on new hazardous and non-hazardous compounding and sterile room requirements.

Retrainee- Job Creation

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

To meet business expansion and customer demand, the Company invested in new equipment (mixing machines and shipping equipment). Therefore, UCP will hire three new employees (Job Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

Training Plan

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

Business Skills: Training will be offered to all occupations in Business Intelligence, Coaching/Mentorship, Negotiation, Persuasion and Time Management.

Commercial Skills: Training will be offered to Pharmacists, Technicians, Customer Service and Supervisors/Managers. Training will include the most up-to-date compounding skills for allergy medications, bio-identical hormones, pain, veterinarian, lozenges, capsules, and other medicines and supplements. These skills will be related to the proper procedures required to meet all relevant government and industry standards and regulations.

Computer Skills: Training will be offered to all occupations in software training including prescription-tracking software, compounding software, Shipping/Receiving software.

Continuous Improvement: Training will be provided to all occupations in Process and Quality Improvement.

Productive Laboratory- Commercial Skills

Trainees may produce goods for profit as part of the PL training, in the courses identified under the Curriculum. Pharmacists, Technicians and Customer Service will receive approximately 24 hours of PL-Commercial Skills training.

Trainees will learn how to operate new and existing equipment, including soft gel encapsulation machines, tablet pressing, powder filling line, blenders, milling, syringes, lozenge equipment and inspection equipment. PL training includes equipment operations, compounding processes, and prescription processing.

Qualified in-house trainers will provide training at a trainer-to-trainee ratio not to exceed 1:1. The trainer will review, observe, coach, demonstrate, as well as document PL training. The most effective way to train employees on how to equipment is in a structured, on-the-job training environment.

Training Infrastructure

The Customer Service Manager, Operations Manager and Lab Manager will conduct administrative duties and maintain training schedules. UCP has also retained Training Funding Source to assist with administration. Training will be conducted by in-house experts.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0274	San Diego	12/14/15 - 12/13/17	\$174,150	\$48,770 (28%)
ET14-0214	San Diego	11/25/13 - 11/24/15	\$159,175	\$139,909 (88%)

ET16-0274: Poor performance was due to the closure of one facility and inability to deliver all planned training. When the facility closed, employees were transferred to another facility. Some training was delivered, but not properly recorded. The Company has now stabilized and expanded its business with goals to hire new staff. UCP has designated additional Managers to ensure proper recording of training hours. The Customer Service Manager, Operation Manager, and Lab Manager will collaborate and coordinate the record keeping process to ensure trainee hours are captured. Project has been right-sized to prior earnings.

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

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- + Business Intelligence
- + Coaching/Mentorship
- + Communication/Active Listening Skills
- + Collaboration Skills
- + Leadership Development
- + Negotiation & Persuasion Skills
- + Product/Service Knowledge
- + Standard Operation Procedures/Policies
- + Time Management
- + Workflow Management Skills

COMMERCIAL SKILLS

- + Critical Thinking
- + Equipment operations & Maintenance
- + Judgement & Decision Making
- + Learning Strategies
- + Monitoring
- + Production process
- + Problem Solving
- + Quality Control
- + Time Management

COMPUTER SKILLS

- + Durable Medical Equipment
- + FedEx
- + LifeFile
- + Paul Klump Compounder
- + Paladin Point of Service

CONTINUOUS IMPROVEMENT

- + Process & Quality Improvement

PL Hours

0 – 30

COMMERICAL SKILLS (Ratio 1:1)

- + Consulting/Verification Procedures
- + Customer Service Workflow
- + Front Counter Procedures
- + Patient Interactions
- + Prescription Filing Procedures
- + Prescription Compounding Procedures
- + Shipping & Handling Procedures

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