

PANEL PACKET

DECEMBER 2017





NOTICE / AGENDA

MEETING TIME/PLACE

Friday, December 8, 2017 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

- | | | |
|------------|---|--|
| 9:30 a.m. | Call to Order by Chair <ul style="list-style-type: none">• Roll Call• Agenda• Minutes | Barry Broad |
| 9:45 a.m. | Report of the Executive Director <ul style="list-style-type: none">• Legislative/Budget/Other• Request Motion to Delegate in Event of Loss of Quorum/Action• Request Motion to Adopt Consent Calendar Projects/Action | Stewart Knox |
| 10:00 a.m. | Subcommittee Report Out | Gretchen Newsom (Chair) |
| 10:20 a.m. | Review and Action on Proposals | Diana Torres
Anna Nastari
Mark Mazzone |
| 12:20 p.m. | Public Comments | |
| 12:30 p.m. | Public Meeting Adjourns | |

The notice of Panel Meetings is also available on the ETP website (www.etp.ca.gov). The times shown here are estimates, and may be changed at the meeting.

The dollar amounts shown here are subject to change up to and including the date of the Panel Meeting. Other changes may also occur (e.g. withdrawn). Please continue to assess this page for updated information.

If the Panel does not have a quorum, it will meet as a subcommittee of the whole at the same time and place. That subcommittee will hear the items identified on this Agenda, but cannot vote or take action.

Special accommodations (i.e., sign language, interpreter, accessible seating) may be requested by contacting ETP at least seven days prior to the meeting date. Please contact the Executive Office at (916) 327-4485.

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, December 4, 2017 although the Panel may still change the order at the meeting.

North Hollywood Regional Office

Applied Technologies Associates, Inc. -----	\$238,500
Arc Mid-Cities, Inc. -----	\$57,540
Armstrong Garden Centers, Inc. -----	\$167,900
California Manufacturing Technology Consulting -----	\$949,690
Chevron Global Downstream LLC -----	\$744,732
Cicon Engineering, Inc. -----	\$109,440
CPH Hospital Management, LLC -----	\$172,800
CU Direct Corporation -----	\$339,600
Economic Development Collaborative-Ventura County -----	\$101,820
Interior Experts General Builders, Inc. -----	\$80,712
LAX Coastal Area Chamber of Commerce -----	\$247,993
Mt. San Antonio College -----	\$274,939
Novacap, LLC -----	\$72,000
P2S Engineers, Inc. -----	\$290,520
Promise Hospital of East Los Angeles, L.P. -----	\$84,700
Pyramid LA Management L.P. dba Sheraton Gateway Los Angeles Hotel -----	\$221,550
Southern California Roofers and Waterproofers Joint Apprenticeship and Training Fund -----	\$449,801
Sun Valley Specialty Healthcare Inc. dba Totally Kids -----	\$100,080
The Cheesecake Factory Bakery Incorporated -----	\$504,000
The Technical School, Inc. dba Technical College -----	\$166,460

San Diego Regional Office

California Tradeshow and Sign Crafts Joint Apprentices Training Trust Fund -----	\$297,240
Capstone Fire Management, Inc. -----	\$74,800
CareMeridian, LLC -----	\$281,200
Eaton Industrial Corporation -----	\$77,976
GreatCall, Inc. -----	\$313,200
Medata, Inc. -----	\$318,480

San Diego Regional Office (Continued)

Mesa Energy Systems, Inc. -----	\$202,320
Orange County Global Medical Center, Inc. -----WITHDRAWN-----	\$443,335
Renovo Solutions, LLC -----	\$99,000
The Nevell Group, Inc. -----	\$77,520

San Francisco Bay Area Regional Office

Everett Graphics, Inc. -----	\$148,716
Stryker Corporation, Stryker Neurovascular Division---WITHDRAWN--	\$324,000

Sacramento Regional Office

Concrete Value Corp. -----	\$247,140
Constellation Brands U.S. Operations, Inc. -----	\$505,350
Diamond Foods, LLC -----	\$371,087
Flatiron West, Inc. -----	\$339,500
KRC Safety Co., Inc.-----	\$73,280
Milestone Technologies Inc. -----	\$656,439
Owens Healthcare, Inc. -----	\$137,230
Quad Knopf, Inc. -----	\$73,892
Setton Pistachio of Terra Bella, Inc. -----	\$81,360
Sunrise Medical (US) LLC -----	\$237,181
SST Construction, LLC -----	\$168,000
The Neil Jones Food Companies -----	\$275,274
Zuckerman Family Farms, Inc. -----	\$112,906

PROPOSALS APPROVED
BY DELEGATION ORDER FOR 10/11/17 – 11/28/17

≤ \$50,000	Approved Date	Approved Amount
<u>North Hollywood Regional Office</u>		
Adelaida Cellars, Inc.	11/03/17	\$30,420
Autoland LLC	11/28/17	\$49,060
Bolide Technology Group, Inc.	11/01/17	\$22,100
Eli's Auto Center II, Inc.	10/27/17	\$47,630
La La Land Production & Design	11/17/17	\$18,720
MB Calram LLC	10/20/17	\$5,200
MBK Enterprises, Inc. dba MBK Tape Solutions	11/21/17	\$49,140
Socal Accessory Production Inc.	11/17/17	\$21,840
Windes, Inc.	11/16/17	\$34,650
Zobrist Consulting Group, Inc.	11/14/17	\$49,920
<u>San Diego Regional Office</u>		
Anthro Interactive, Inc.	11/14/17	\$24,570
DMG Corporation	10/06/17	\$48,880
Douglas Pancake Architects, Inc.	11/16/17	\$14,040
Enterey Inc.	10/19/17	\$48,730
Frazer LLP	11/21/17	\$42,900
Fruth Custom Plastics, Inc.	11/07/17	\$32,692
Managed Solution LLC	11/06/17	\$49,400
Next Level Internet, Inc.	11/06/17	\$33,800
Pacific Companies, Inc.	10/25/17	\$44,880
Uniluv Marketing, Inc.	11/07/17	\$15,600
<u>San Francisco Bay Area Regional Office</u>		
Goorin Bros. Inc.	10/20/17	\$49,932
Lin Engineering, Inc.	11/28/17	\$26,286
Mytility Corp.	10/25/17	\$15,840

Panel Date: December 8, 2017

Sacramento Regional Office

Bennett Engineering Services Inc.	11/21/17	\$17,862
Booth Ranches LLC	11/06/17	\$28,080
Monster City Studios	11/06/17	\$18,200



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MB Calram LLC
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Mytility Corp.
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Uniluv Marketing, Inc.
Windes, Inc.
Zobrist Consulting Group, Inc.



M e m o r a n d u m

To: Panel Members Date December 8, 2017

From: Stewart Knox Executive Director File: Panel Memo Doc.

Subject: **Directions to Meeting Site**

The Employment Training Panel will meet on FRIDAY, **December 8, 2017 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 December 8, 2017

From: Stewart Knox
Executive Director

File: Mtg. Site Memo

Subject: **Future Meeting Sites**

<p>December 8, 2017</p>	<p>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</p>
<p>January 26, 2018</p>	<p>New City Hall Time: 09:30 AM Council Chambers Room 1103 951 I Street Sacramento, CA 95814</p>
<p>February 23, 2018</p>	<p>New City Hall Time: 09:30 AM Council Chambers Room 1103 951 I Street Sacramento, CA 95814</p>
<p>March 23, 2018</p>	<p>California Environmental Protection Agency Time: 09:30 AM Sierra Hearing Room, 2nd Floor 1001 I Street Sacramento, CA 95814</p>

STATE OF CALIFORNIA

ETP

EMPLOYMENT
TRAINING PANEL

**STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL**
Sacramento City Hall
California Environmental Protection Agency
1001 I Street, Sierra Hearing Room
Sacramento, CA 95814
October 27, 2017

PANEL MEMBERS

Barry Broad
Chair

Janice Roberts
Vice-Chair

Gloria Bell
Member

Will Koch
Ex-Officio Member

Gretchen Newsom
Member

Edward Rendon
Member

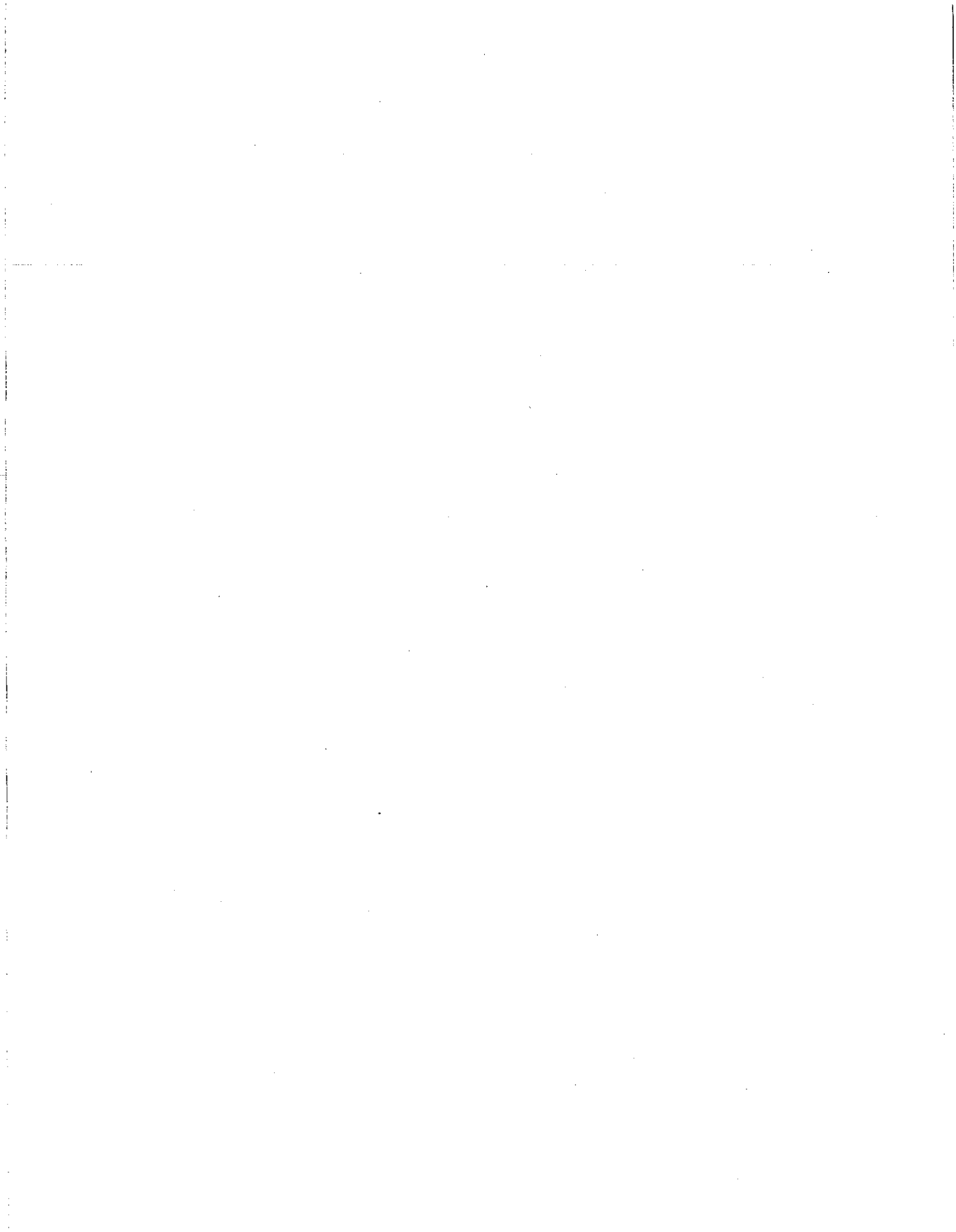
Jeff Robinette
Member

Sam Rodriguez
Member

Executive Staff

Stewart Knox
Executive Director

Maureen Reilly
General Counsel



STATE OF CALIFORNIA
EMPLOYMENT TRAINING PANEL
Sacramento City Hall
California Environmental Protection Agency
1001 I Street, Sierra Hearing Room
Sacramento, CA 95814
October 27, 2017

I. PUBLIC PANEL MEETING CALL TO ORDER

Chairman Barry Broad called the meeting to order at 9:32 a.m.

II. ROLL CALL

Present

Gloria Bell
Barry Broad
Will Koch
Gretchen Newsom
Janice Roberts
Jefferson Robinette
Edward Rendon
Sam Rodriguez

Executive Staff Present

Stewart Knox, Executive Director
Maureen Reilly, General Counsel

III. AGENDA

Chairman Broad said, we are now going to approve the Agenda. I would like to announce one change in the Agenda at the request of a couple of project groups who have planes to catch. We are going to take Agenda Items 30 and 34 first and then move on from there. Do I hear a motion to approve the change to the Agenda?

ACTION: Ms. Bell moved and Mr. Rendon seconded the motion that the Panel approve the Agenda with the requested change of Items 30 and 34.

Motion carried, 8 - 0.

IV. MINUTES

ACTION: Ms. Roberts moved and Ms. Newsom seconded the motion that the Panel approve the Minutes from the September 22, 2017 meeting.

Motion carried, 8 - 0.

V. REPORT OF THE EXECUTIVE DIRECTOR

Stewart Knox, Executive Director, said welcome and good morning Panel members, applicants, and stakeholders. Following the last Panel Meeting in September, we have a smaller Panel Meeting today, totaling approximately \$7.4M with another \$532K in Delegation Orders for a total just over \$8.0M.

Today we have a mix of Single Employer and Multiple Employer Projects. Diana Torres, San Diego Regional Office Manager, Anna Nastari, S.F. Bay Area Regional Office Manager, and Mark Mazzone, Sacramento Regional Office Manager, are here today to present the Proposals.

Regarding the Budget for Alternative and Renewable Fuel and Vehicle Technology Program (ARFVTP), we are in partnership with the California Energy Commission with \$2M approved through an Interagency Agreement. We have had four proposals in the last few months for over \$900,000, one that was approved over \$620,000 already leaving approximately \$500,000 remaining for this year.

In regard to Core Funds for FY 2017/18, today the Panel will consider and additional \$7.4M in projects and another \$532K approved by Delegation Order. Should the Panel approve all the projects today, ETP will have approximately \$43M the remainder of the Fiscal Year (FY) 2017/18.

Under Delegation Order, all project proposals are capped at \$50,000 to be approved by the Executive Director on a continuous flow basis, which as of today, 16 projects were approved totaling just under \$532K.

For FY 2017/18 program funding to date, we have approximately 367 projects submitted, with a value of just over \$100M. The Panel has already approved just under \$51M with 184 projects to date, if all proposals are funded today.

Regarding applications for contracts that are remaining in the Regional Offices: Single Employer Contract requests are at \$31M; \$20M in allocation. Multiple Employer Contract (MEC): Regional Offices/AAU: requests are at \$8M; \$10M in allocations. Small Businesses have \$5.9M in demand; \$3.6M in allocations. Critical Proposals are at \$0.00 in demand; \$4.2M in allocations. Apprenticeship programs are at \$1.5M in demand; \$2.6M in allocations. Overall demand is approximately \$48M.

The number of total projects in FY 2017/18 in the Regional Offices are 277; total number of projects in the Applications and Assessment Unit is 90; overall total of 367.

Again, Staff is working hard to get the projects assigned out to the Regional Offices. About 80% have been assigned to the Regional Offices to date.

Legislative Update

In terms of legislative updates, we have provided copies of a memorandum for the Panel members. There is a lot of information on Workforce Development and Cannabis as well.

VI. MOTION TO ADOPT CONSENT CALENDAR PROJECTS

Chairman Barry Broad asked for a motion to adopt Consent Calendar Items #1 through #24.

Anchor Healthcare, LLC.....	\$249,964
Andrew Furuseth School of Seamanship.....	\$ 54,593
BEGA North America, Inc.....	\$ 89,658
B-K Lighting, Inc.....	\$129,980
California Faucets, Inc.....	\$108,000
California Sheet Metal Works, Inc.....	\$132,818
Chatsworth Products, Inc.....	\$ 73,710
Dytran Instruments, Inc.....	\$201,852
Emser Tile, LLC.....	\$245,700
Fresno Surgery Center, L.P.....	\$240,256
Giligia College.....	\$ 70,512
Greater San Fernando Valley Chamber of Commerce.....	\$187,176
Gumbiner Savett Inc. Certified Public Accountants & Business Advisors.....	\$ 62,480
KCoe Isom, LLP.....	\$111,675
Koos Manufacturing, Inc.....	\$245,862
Landscape Development, Inc.....	\$167,400
Momentous Insurance Brokerage, Inc.....	\$117,990
Napa Valley College.....	\$ 42,340
No. California Shop Ironworkers Local 790 Apprenticeship & Training.....	\$ 50,720
Pyramid San Francisco Management L.P.....	\$130,800
Sensiba San Filippo, LLP.....	\$108,120
Tiger Lines, LLC.....	\$ 65,065
Treehouse Private Brands, Inc.....	\$174,860
W.E. O'Neil Construction Co. of California.....	\$111,240

ACTION: Mr. Rodriguez moved and Mr. Robinette seconded the motion to approve the consent calendar for Items #1 through #24.

Motion carried, 8 – 0.

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

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

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

Motion carried, 8 – 0.

Mr. Knox said, we do have a presentation on two items that we will look to for guidance on, to bring back for a confirmation, but wanted to update one more time.

Mr. Broad said, before we begin our report of the General Counsel, I would like to report on the General Counsel. Our General Counsel Maureen Riley is retiring today. I envy her. She has a state bar card that is just slightly more advanced than mine, and is a year less than me. Ms. Riley started in state service before she was a lawyer in 1976. She has been a lawyer since 1983. She started here on the Panel in 2005, right? Ms. Riley said, Yes. Mr. Broad said, she has been General Counsel for quite a while and has done a really wonderful job. I have worked closely with her. She sits to my right at every Panel meeting. We've had to do many hearings together on various subjects over the years. A couple of things I want to say about her from my perspective, she has a kind of a quiet, dignified approach, and a very laconic, cynical sometimes sense of humor which I completely appreciate. She and I played online Scrabble, which I also played with Ms. Roberts. However, Ms. Riley let me win more often than Ms. Roberts, who beat me every single game. I have to say this about Ms. Riley, she is an excellent lawyer, and I say that as a lawyer. I wish I was that good of a lawyer. She has command of the subject matter. Ms. Riley was instrumental during the period when we were without an appointed executive director. She stepped up and kept the ETP program together. We will all miss her. She truly was a tremendous asset to this Agency. We have this Resolution. While I will not read the entire Resolution, I will read the "Resolved" portion since all of the facts are contained therein. Here it is:

"Resolved that we the members of the Panel do hereby extend to Maureen Riley our sincere and grateful appreciation for her dedicated service to the Employment Training Panel and the State of California. Our congratulations on her well-earned retirement and best wishes for her continued success, happiness, and good health in the years to come. We are honored to have worked with you and have you as a member of the ETP family."

Thank you Maureen, thank you very much.

Ms. Riley said, I just have to say a word, thank you too and the ETP family is a very good way to put it. I look around the room and see not just co-workers, not just colleagues, but true friends. My dear friend Jill McAloon, who was the Acting Executive Director. I offered her advice, which is free. It's been a wonderful experience and I will miss a lot of people and the Panel has been great. I wish you all the best too. It's a great program. Keep it going. There will be changes, but it's one of the best programs in California. It has truly been a privilege working here. So thank you.

Mr. Broad said, I would also like to announce another departure, the gentleman on the far right, Ed Rendon, is leaving the ETP Panel. Ed and I are very close personal friends. We have known each other for many years. He was the Political Director, until just a few months ago, of Teamsters in Southern California. I am the Teamsters lobbyist so we have a personal relationship that is well beyond the Panel. We thank him for his 11 years on the Panel. I know Ed very well and while he is a gentleman of a few words on the Panel, he's actually one of the most talkative people I know. He's extremely loquacious, intellectually excited, and an excitable person. On the Panel he has been extraordinarily dignified and quiet. He does not ask questions for the sake of asking questions. He has been here at almost every Panel Meeting, flying in from Southern California. I am sorry to see Ed go, he is such a good person. Thank you Ed for your years of service on the Panel and good luck in your new

endeavor. Your service is very much appreciated. Ed has had a very successful career working in the labor movement. He's going to have a very successful career in his future and we thank him. Ed do you have anything you would like to say?

Mr. Rendon said, yes I do. Thank you Mr. Broad and the Panel. We have been working together for a very long time. What people don't realize is that I don't say a lot up here, I did in the beginning. In 1996-97 in San Diego, I did present on our truck driver training program as a Teamster. I came before the Panel and it was a very long process and it was great. Little did I know that I would be appointed to this Panel and serve 11 years. What people don't realize is that my passion and my work is out in the field marketing. I have sent a lot of people to ETP. It's what I do. I don't need to be on this Panel to continue to do that. I will continue to push this program because I believe in it. I stayed on so long because I believe in what we do here. So thank you everyone. It's been a pleasure to serve here.

VIII. REPORT OF GENERAL COUNSEL

Maureen Reilly, General Counsel, provided the following report:

First off, this is really a reminder Mr. Broad. ETP staff has the idea of setting up a subcommittee. ETP staff has begun assisting in a systematic and comprehensive review of the ETP program with an eye towards improvement and simplification. A lot of revisions have already been completed on valuation of health benefits. For example, we have started on an approach toward streamlining the reimbursement rates that was presented last time. As you know, a new rate table will be presented for action in future meetings. There are program areas still undergoing review, in particular, the issue of the Substantial Contribution requirement. It is a complicated area and we are asking Chairman Broad if you would appoint a subcommittee of the Panel to aid the staff in formulating the reform of the revision. The committee would conduct its business in an open meeting forum allowing input from stakeholders. It would report to the Panel at the next regularly scheduled panel meeting following a subcommittee meeting. The Panel Bylaws authorize the Chair to appoint the committee as needed to further the order of Panel business. The committee must consist of no less than three but no more than four members to be appointed in consultation with the Panel Members present. Again, this would be on the subject of the Substantial Contribution requirement. Thank you Chairman Broad.

Mr. Broad said I'm going to exercise my prerogative as its Chair and I'm going to appoint a panel of three members. If you don't want to serve, just let me know, but I'm going to ask Gretchen Newsom to be the Chair of this subcommittee. I'm going to ask Ms. Roberts, our Vice Chair, to serve on the committee. I will actually appoint myself to serve as the third person. That will be the order of the day.

Ms. Riley said, I have one more thing. This is a little unusual. It concerns a new item that staff has recommended for Lowest Funding Priority under the Strategic Plan that will be presented later to you today for approval. This is a matter of priority as to whether the Panel wants to fund training for top-level executives in a professional services firm that is also a small business. By top-level I mean partners or principals in a firm that provide accounting, money management, tax advisory, engineering or architectural services, and legal services. The Panel has already put into place a prohibition against training lawyers, regardless of the company size. Funding for this type professional services firm, at least as a small business, is a relatively recent development. Funding for partners is just coming up. We have two small business proposals with this occupational title this month. One of them is on the Consent Calendar. Partners earn about \$100 an hour in base salary but with their end-of-the-year bonuses what is already a six-figure income can double or triple. Partners and also Principals in a professional firm run the company regardless of whether they are also the owners. They are expected to recruit, retain clients and determine the company's direction for expansion.

They decide which partners or principals get the highest bonuses and distribute the remaining bonuses to the staff. This is only an issue for small businesses because owners and top level executives do not qualify for ETP funding in a standardized company. There are, however, two exemptions designed to encourage participation by small businesses; a panel regulation that allows training for owners, and a panel policy that allows training for top-level executives. These two exemptions were based on the premise that owners and executives also swept the floor and emptied the trash in a typical mom-and-pop small business. However, that premise does not hold true in the world of professional services where the partners and principals are performing white-collar services that require at least an undergraduate and often a graduate degree or certification such as certified public accountant or certified financial advisor. Let my comments show that the Strategic Plan language to exclude partners in small business professional services should also exclude principals. We recommend that this lowest priority designation be made effective as of January 2018 given that many accounting and advisory small business proposals are now in development under this existing policy.

Mr. Broad said, what I would like to do is to give these firms, should they want to, the opportunity to comment on this. Let's put this on the Agenda as an action item at the next hearing and discuss it then. It wouldn't make sense for the panel to fund a lobbying firm or for us to fund how to do lobbying. It wouldn't make sense in a firm such as ours where there are two principals and one employee. If we get new computer software, which we all have to know and learn in order to make the business function more efficiently, that makes sense. Ms. Riley's point that we are sweeping the floor and we are doing the same work as subordinate employees, that makes sense. But in the larger context it really does not make sense. We are not paying the tax because we are partners, we are not paying the tax on ourselves. We are paying the tax on the employee and to the extent that we are getting trained, we're getting trained on taxes that everybody else's is paying. It needs to be understood that the principals and owners of partnerships or small businesses like this are not among the people who are paying this tax or for whom this tax is being paid. It is not unfair in that respect and it is, in fact, an extension of what we're doing for employees in training and firms. It makes sense in that narrow context in my opinion; however, if someone wants to make a comment about this, I think that they should be availed the opportunity to do so. Let's put that on the Agenda for the next month.

IX. REVIEW AND ACTION ON PROPOSALS

Mr. Broad said, were going to Agenda Item number 30 first. Ms. Torres said, Panel Members if I could just go back from tab 30 to tab 24 there is just something I need to say for the record. Under tab 24 which is Consent, one of the affiliate names was left out and that's Kern Construction. They are in the training plan and have been approved. They are a knowledgeable and participating affiliate employer and I just wanted to put that on the record for Kern Construction. Mr. Broad said, to let the record reflect that thank you.

Multiple Employer Contract

Tab #30 - Finishing Trades Institute of District Council 36 Joint Apprenticeship and Training Trust Fund¹

Ms. Torres presented a proposal for Finishing Trades Institute of District Council 36 Joint Apprenticeship and Training Trust Fund (FTI) in the amount of \$949,595. FTI provides training for workers represented by local unions that make up the Painters and Allied Trades District Council 36, which represents approximately 11,000 members. Prior to 2013, FTI was

¹ Note: This is Agenda Item Tab #30 and heard out of order due to flight schedules.

known as Southern California Painting and Drywall Industries Apprenticeship Training Trust Fund. Bargaining for the signatory employers is conducted by two trade associations: Los Angeles Painting & Finishing Contractors Association, and the Western Wall & Ceiling Contractors Association.

The signatory employers are painting, drywall and glazing contractors. Training is provided at four training centers operated by FTI in Los Angeles (2), Orange, and San Diego Counties. This will be the seventh ETP Agreement with FTI, and the fourth in the last five years.

Ms. Torres introduced Jesus Fernandez, Training Director, Oscar Mayer with the Los Angeles Unified School District Advisor, and Steve Duscha of Steve Duscha and Advisories.

There were no questions from the Panel.

ACTION: Ms. Newsom moved and Mr. Rendon seconded approval of the proposal for Finishing Trades Institute of District Council 36 Joint Apprenticeship and Training Trust Fund in the amount of \$949,595.

Motion carried, 8 - 0.

Mr. Broad said, we are now going to Agenda Item Number 34.

AB118

Tab # 34 - KLA-Tencor Corporation ²

Ms. Nastari presented a Proposal for KLA-Tencor Corporation in the amount of \$432,000. KLA-Tencor supplies process control and yield management solutions for the semiconductor and related nanoelectronics industry. Its products are used in high technology industries, including the light emitting diode (LED) and data storage industries, electric vehicles, as well as general materials research. The company's primary focus is in inspection and metrology products that help integrated circuit (IC or chip) manufacturers yield throughout the entire fabrication process. The company sells directly to semiconductor manufacturers such as Intel, Taiwan Semiconductor, Samsung and Micron Technologies.

Ms. Nastari introduced Efren Lopez, Senior Director Learning and knowledge Services, Myrna Adame, Enrollment Operations Manager GSS-Learning and Knowledge Services, and Peter Guerrieri, Technical Training Manager Learning and Knowledge Services.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of the proposal for KLA-Tencor Corporation in the amount of \$432,000.

Motion carried, 8 - 0.

Mr. Broad said, we will now move back to the top of the list.

² Note: This is Agenda Item # 34 and was heard out of order due to flight schedules.

Single Employers

Tab # 25 - EastWestProto, Inc. dba Lifeline Ambulance

Ms. Torres presented a Proposal for EastWestProto, Inc. dba Lifeline Ambulance (Lifeline), in the amount of \$316,000. Lifeline was founded in 2002, and is headquartered in Montebello, CA. The company is a rapidly growing provider of non-emergency inter-facility ambulance services throughout Los Angeles and Orange Counties. Lifeline provides ambulance service 7-days a week, 24-hours per day and is expanding its workforce by up to 200 net new jobs.

Lifeline contracts with major healthcare plans, hospitals and medical groups to provide inter-facility transfer services for patients. Inter-facility transfer is defined as any transfer, after initial assessment and stabilization from and to a healthcare facility. This will be the company's second EPT Agreement, and its second in the last five years.

Ms. Torres introduced Danny Santillan, Director of Operations/Human Resources and Bill Parker of National Training.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Mr. Rendon seconded approval of the proposal for EastWestProto, Inc. dba Lifeline Ambulance, in the amount of \$316,000.

Motion carried, 8 - 0.

Tab # 26 - Lockheed Martin Corporation

Ms. Torres presented a Proposal for Lockheed Martin Corporation (LM Aero), in the amount of \$400,602. LM Aero is engaged in the research, design, development, manufacture, integration, sustainment, support, and upgrade of advanced military aircraft. This includes combat and air mobility aircraft, unmanned air vehicles, and related technologies. Training will take place at the company's Palmdale facility, and at nearby Edwards Air Force Base. LM Aero employs approximately 2,800 employees between both locations.

Ms. Torres introduced Jon Gustafson, Manager of Workforce Partnerships and Incentives.

Mr. Rodriguez said, just one quick question I know you can't talk about the advanced development program on the Lockheed Martin but in terms of its projections, is it only going to be California or will it be the same program is in New Mexico? Mr. Gustafson said, it will train Californians and if they are working on programs that are supporting other platforms in other states, that's a possibility. Mr. Rodriguez said let me rephrase, do you believe that the growth will be in the Palmdale facility versus the New Mexico facility? Mr. Gustafson said, I believe it will be in the Palmdale facility.

Ms. Roberts said, I am confused about your workforce partnerships and incentives. Is there no one here from Lockheed Martin and Marquee Group? I don't know where you fit into the scheme of things.

Mr. Gustafson said, I lead the function enterprise wide for training grounds and partnerships. Marquee Group works for us on our behalf to manage symptoms so I'm here to represent Lockheed Martin.

ACTION: Mr. Rodriguez moved and Ms. Newsom seconded approval of the proposal for Lockheed Martin Corporation. in the amount of \$400,602.

Motion carried, 8 – 0.

Tab # 27 - Omni Hotels Management Corporation dba Omni La Costa Resort and Spa

Ms. Torres presented a Proposal for Omni Hotels Management Corporation dba Omni La Costa Resort and Spa (Omni La Costa) in the amount of \$171,800. Originally built in 1964, Omni La Costa is a historic golf resort and spa located on 400 acres in Carlsbad. It provides luxury accommodations, resort golf courses, and convention/conference resources to corporate businesses and upscale worldwide leisure travelers. Omni La Costa's parent company, TRT Holdings, Inc., also owns four Omni facilities located in the cities of San Diego, San Francisco, Rancho Mirage, and Los Angeles. All five proposed facilities operate under the same California Employer Account Number (CEAN). All facilities specialize in luxury lodgings targeted to business travelers and tourists. In addition to room accommodations, the properties offer business and fitness centers; high-speed and wireless internet access; and gourmet restaurants. The facilities also provide space for weddings, special occasions, and meetings.

Omni meets out-of-state competition requirements as a destination resort and/or conference/convention center competing nationally and internationally for business. (Title 22, California Code of Regulation, Section 4416(g) (1-4).) All five Omni facilities will participate in the proposed training plan, with Omni La Costa as the lead contract holder.

Ms. Torres introduced Anthony Belef, Area Director Human Resources.

Mr. Broad said, I thought that La Costa was a unionized facility, at least in Carlsbad.

Mr. Belef of said, we have a union as well as a non-union in La Costa.

Mr. Broad said, we don't have a letter from the union that means you will need one if your unionized employees are being trained or are all these non-unionized employees being trained?

Mr. Belef said, right now the proposal does not include the union associates but we hope to include them later.

Mr. Broad said, when you do, the union needs to write a letter of support as you can see from some of the other contractors.

Ms. Newsom said, I just want to refer back to what the Chairman was talking about earlier. Omni did reach out to me and they do not have a contract in San Diego County. They are very frustrated. The workers are frustrated. Since 1975 there was a "Union" hotel at the site and when Omni moved in as the new operator, a contract was not extended to them. They are waiting.

Mr. Belef of said, we're in the middle of a negotiations right now. I just received an update from our Chief Human Resources Officer who has been meeting with Bridget. My expectation is that the settlement will be reached or renewed by the end of this month.

Ms. Roberts said, I have a question regarding the rightsizing as well. Looking at your performance for 22% from the last contract and you earned \$92,000. Now you are asking for \$251,000, to me that's not right-sized even though with the Substantial Contribution it's \$171,000. Even going back to the original amount of \$251,000, that doesn't tell me that you right-sized this at all. There is another issue regarding the Human Resource Director (HRD), which I believe is you. It stated that the HRD had been moved around or left the company,

it's not clear as to what exactly occurred. I have a Masters in Human Resources and know if that's the case, then you are not the right person to be ministering this. If this was the case on this contract and the previous contract, you told me that you have some training managers and you're going to centralize it in La Costa, which are all great things. But what I need to know is if there is someone else that will actually minister this contract. To tell you the truth, I'd like to right-size this down even further and then if you can perform, you can come back. But right now just based on your past performance I don't think that you're going to earn a \$171,000.

Mr. Belef said, I arrived at La Costa in February 2016 and I think our contract expired and ended in July. We added San Diego and Rancho to that contract in the last few months. I am interested in making sure that those hotels and resorts fully participate in it. I am open to any suggestions the Panel may have.

Ms. Roberts said, I would recommend to rightsizing even further because I'm not confident that you are going to earn \$171,000. In trades like resorts and with the union coming on, you have a lot of negotiating going on. Things can get lost in the shuffle. I speak from personal experience. Your contractor National Training Company will also have to readjust their flat fee as well. They are now asking for \$15,000. I'm Bill Sacks with National Training and yes, we would adjust the fees.

Mr. Broad said, so Madam Vice Chair do you want to put your proposal in the form of a motion? Ms. Roberts said, yes I would like to put it at \$100,000.

Mr. Broad said, can we amend that motion to allow them to come back and ask for additional monies under this up to what amount?

Ms. Roberts said, yes. They're asking for \$251,000 and they took the Substantial Contribution of \$80,000, they are asking for an additional \$171,000 now. They could come back for another \$100,000 if you think that you can do 70% of the training within one year, you certainly could come back.

Mr. Broad said, so the motion is to approve is for \$100,000, with the understanding if they do 70% of the training within one year they can come back and ask for the remaining \$71,000. Ms. Roberts said, yes.

Ms. Newsom said, I would ask when they do come back if staff can update the profile to make sure the Union letter is in it.

Mr. Broad said, yes, we would have to vote on it. They would have to come back and ask for the additional monies. Even though it might somehow fit within our consent calendar, in situations like this, it would need to come back to the full Panel. That's the motion. Is there any other questions or comments about this?

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for Omni Hotels Management Corporation dba Omni La Costa Resort and Spa for the *reduced* amount of \$100,000.

Motion carried, 8 – 0.

Tab # 28 - SchoolsFirst Federal Credit Union

Ms. Torres presented a Proposal for SchoolsFirst Federal Credit Union (SFCU), in the amount of \$333,000. Founded in 1934, SFCU is headquartered in Santa Ana, with three administrative offices and 46 branches located throughout Los Angeles, Orange, Riverside,

San Bernardino and San Diego Counties. SFCU currently serves approximately 731,500 members and manages \$13 billion in assets. Products and services include: savings accounts, checking accounts, auto loans, credit cards, home loans, investment services, insurance services, retirement accounts, financial advice, and electronic banking services. However, the home loan operations/functions are not included in this training proposal.

Ms. Torres introduced Carolyn Reeves, Vice President, Learning and Development.

Ms. Roberts said, just a comment that you pay very good wages this is a great contract first time.

Ms. Reeves said, thank you. We really are committed to our team as an organization and thank you for recognizing that.

ACTION: Mr. Rodriguez moved and Ms. Bell seconded approval of the Proposal for SchoolsFirst Federal Credit Union in the amount of \$333,000.

Motion carried, 8 – 0.

Tab # 29 - Mann Packing Co., Inc.

Ms. Nastari presented a Proposal for Mann Packing Co., Inc. (Mann Packing), in the amount of \$294,400. Founded in 1939, Mann Packing has eight facilities and is headquartered in Salinas. Mann Packing offers fresh-cut and commodity vegetables for retail, wholesale, and foodservice marketplaces. Mann Packing qualifies for ETP Out-Of-State Funding, as it provides vegetables to food services and retail companies throughout North America, including Walmart and Costco.

Ms. Nastari introduced Paul Eads, Director of Human Resources, and Jim Rodger, ASP Safety Supervisor.

Ms. Bell said, how did you find out about the Employment Training Panel?

Mr. Eads said, I worked for another company in my past that participated in ETP's program. Ms. Bell said, thank you for applying. What we find is starting the process is challenging so we ask you to really reach out. We get stretched. You are on a recall right now with your product. How is your recall product going to affect your training program?

Mr. Eads said, it should not have any affect. This is a voluntary recall. We are working closely with the FDA and plan to get past this. We believe in providing safe products to our customers and plan to do a lot of training on food safety. That's how we will use some of these funds.

Ms. Bell said, please reach. If you find you are challenged and can't reach your metric. Please reach out to a representative. They are there to make you successful and I want you to be successful because I also believe in the salad bowl capital of the world.

Mr. Broad said, I would just say that as a first-time project it's very ambitious. You are training a large percentage of your workforce across multiple locations. Our process can be challenging under those kinds of circumstances. Right away, you are going to need to be very focused in on all of the things you need to do to actually earn the money. Logging in the hours etc. It is an ambitious project, a good one, so you cannot let it slide.

Mr. Eads said, we do have a plan in place and Jim put that together. We understand that it is quite a commitment. Our goal is 100%. I hope to come back and do a second one.

Ms. Bell said, can you share your plan with us?

Mr. Rodger said, we have already reached outside with Bill Sacks. He has helped us. We already have the commitment, we have Alchemy Systems as well that we are going to be using, we have already been training our supervisors to roll out these trainings to all of our employees, we know the commitments, the hours that are needed, and feel ready to attack all of this head-on, as soon as you give us the approval. We are very excited and we are ready to grow.

Ms. Bell asked if you are a member of Ag Safe? That's a really good option as well. I wish you luck.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of the Proposal for Mann Packing Co., Inc., in the amount of \$294,400.

Motion carried, 8 - 0.

Multiple Employer Contracts

Tab # 31 - Kern Community College District

Ms. Torres presented a Proposal for Kern Community College District (KCCD) in the amount of \$582,000. Founded in 1968 and headquartered in Bakersfield, KCCD strives to provide outstanding educational programs and services responsive to its diverse students and communities. KCCD includes Bakersfield College, Cerro Coso College, and Porterville College.

KCCD serves Kern, Tulare, Inyo, Mono, and San Bernardino Counties, making it one of the largest districts in the United States. In addition to classes held on campus, KCCD offers localized instruction through educational centers in Delano, Bakersfield, Bishop, Mammoth Lakes, Lake Isabella, and Edwards Air Force Base. KCCD is committed to distanced learning through the Internet, satellite programming, and cable television. KCCD is also committed to providing training opportunities to small companies located in rural areas that typically do not have the funding available to provide needed training to their employees.

The District's Workplace Learning Resource Center and the 21st Century Energy Center will administer the ETP program. These centers are part of a California Community Colleges Chancellor's Office initiative to provide a foundation for a long-term, sustained relationship with business and labor across the districts. The centers provide high quality, innovative and affordable education, and in-depth training solutions to meet the needs of business and industry. It conducts outreach to employers in manufacturing, health care, food processing, logistics, construction, energy (solar, turbine, biofuel) and alternative energy construction.

Ms. Torres introduced Dave Teasdale, Director of Economic and Workforce Development Programs.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Ms. Bell seconded approval of the proposal for Kern Community College District the amount of \$582,000.

Motion carried, 8 - 0.

Tab # 32 - KML Enterprises Career Development, LLC dba New Horizons Learning Group

Ms. Torres presented a Proposal for KML Enterprises Career Development, LLC dba New Horizons Learning Group (New Horizons) in the amount of \$421,300. Founded in 1982 and headquartered in Anaheim, New Horizons is a private training agency that specializes in Information Technology (IT), offering a wide variety of computer-related courses. New Horizons is a Microsoft IT Academy and a Microsoft Gold Partner and provides Microsoft, Cisco, CompTIA, Corel, Adobe, and Novel courses along with Internet and Security courses.

New Horizons has been providing computer skills training to large and small businesses throughout Southern California since 1982. It provides training on Business Skills and Continuous Improvement Training based on employer demand.

New Horizons has additional training facilities in Burbank, San Diego, Gardena, San Bernardino and Sacramento. New Horizons is eligible for ETP funding as a private training agency. This is the second ETP Agreement with New Horizons, and the second in the last five years.

Ms. Torres introduced Ryan Landry, President and General Manager, Bill Sacks, Vice President of Operations, National Training Company.

There were no questions from the Panel.

ACTION: Ms. Roberts moved and Mr. Rodriguez seconded approval of the proposal For KML Enterprises Career Development, LLC dba New Horizons Learning Group in the amount of \$421,300.

Motion carried, 8 - 0.

Tab # 33 - Sheet Metal & Air Conditioning Apprenticeship & Journeymen Joint Training Fund of San Diego

Ms. Torres presented a Proposal for Sheet Metal & Air Conditioning Apprenticeship & Journeymen Joint Training fund of San Diego (SMJTF) in the amount of \$304,710. Established in 1941 SMJTF is a joint effort by the Sheet Metal Worker's International Local 206 and the Sheet Metal and Air Conditioning Contractors National Association. Their mission is to provide up-to-date industry skills training and secure high-quality job opportunities for its members as negotiating through collective bargaining.

Located in San Diego, the SMJTF training center has a total of seven classrooms and labs; a computer center with 20 stations; and a welding shop with 16 welding booths. All training under this Agreement will be center based. SMJTF currently serves 111 Apprentices and 450 Journeymen with San Diego and Imperial Counties.

There are 34 signatory employers contributing to the Sheet Metal Trust Fund. These employers perform specialized construction work ranging from the design, layout, fabrication and installation of duct systems to architectural sheet metal fabrication, metal roofing construction, and a variety of other shop or sheet metal work. SMJTF also provides skills upgrade training to Journeymen in the latest sheet metal technologies.

Ms. Torres introduced Chris Caricato, Training Director, Kelly Greer, Strategy, and Jan Borunda of California Labor Federation.

Ms. Roberts said, the fast entry for the veterans, are you the only apprenticeship program doing them or are there other ones that do the fast entry for veterans?

Mr. Caricato said, yes a lot of apprenticeships are starting to do you that and have done that in the past. Mrs. Robert said, that's great. Thank you.

ACTION: Ms. Roberts moved and Ms. Newsom seconded approval of the proposal for Sheet Metal & Air Conditioning Apprenticeship & Journeymen Joint Training Fund of San Diego in the amount of \$304,710.

Motion carried, 8 - 0.

Amendments

Tab # 35 - Bay Alarm Company

Mr. Mazzone presented an Amended Proposal for the Bay Alarm Company (Bay Alarm) in the amount of \$199,400. Bay Alarm, a subsidiary of BALCO Holdings, Inc., is the largest independently owned and operated security company in the United States. The company offers a full range of security products to approximately 100,000 residential and commercial customers across California, including burglar and fire alarm systems, access control and video surveillance.

Mr. Mazzone introduced Rebecca Volokh, Training and LMS Administrator, and Chris Mangles from Training Funding Partners.

There were no questions from the Panel.

ACTION: Mr. Broad moved and Ms. Roberts seconded approval of the proposal of additional monies for Bay Alarm Company in the amount of \$199,400.

Motion carried, 8 – 0.

X. PRESENTATION ON STRATEGIC PLAN FY 2017-2018

Lis Testa provided the following presentation:

Ms. Testa said, before we get started I just want to give a big Thank You to the Planning and Research Unit. They worked very hard on getting the plan finished. They had contributions from our Fiscal Unit, as well as from the Executive Staff. It was huge group effort in getting this done and I want to thank them for all of their hard work.

2017-2018 ETP Strategic Plan:

Contents:

- A.** Vision & Mission Statements
- B.** Introduction/Overview/Accomplishments
- C.** Goals & Objectives
- D.** Administrative Strategies
- E.** Economic Overview

- F. Priority Industries
- G. Workforce Trends
- H. Strategic Initiatives
- I. Strategic Alliances
- J. Appendix: Program Budget

A: Vision & Mission Statements

- **Vision:** The Employment Training Panel (ETP) will support job creation and retention in California through strategic partnerships with business, labor, and government.
- **Mission Statement:** ETP provides financial assistance to California businesses to support customized worker training to:
 - Attract and retain businesses that contribute to a healthy California economy;
 - Provide workers with secure jobs that pay good wages and have opportunities for advancement;
 - Assist employers to successfully compete in the global economy; and,
 - Promote the benefits and ongoing investment in employee training among employers.

B: Introduction/Overview/Accomplishments

- **Introduction: Fulfilling Its Mission**

Gives a brief history of ETP, and describes ways we meet our mission statements.

- **Overview of the Organization**

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

- **Accomplishments**

- Points readers to ETP's yearly Annual Reporter for performance statistics

C: Goals & Objectives

- Outlines six (6) main goals of ETP:

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

D: Administrative Strategies – pp. 4-7

(1)

- Introduces six (6) policies and approaches that ETP uses to maximize program efficiencies:
- 1) **Process Improvement & Simplification:** ETP has begun a process of comprehensively reviewing our policies with the goal of improving our processes and simplifying the more complicated areas of our program.
 - Better workflows for staff & streamlined processes for customers
 - Better preparation for the development of a new data management system
 - Bring ETP into increased alignment with other Labor Agencies
- 2) **Maximizing Funds:**
 - Increase in ETT collections in FY 16-17 that will most likely continue in FY 17-18
 - Increase in the amount of prior FY funding liability carried forward to FY 17-18
 - Full appropriation of ETT revenue to ETP in FY 17-18 State Budget Act

(2)

▪ 3) **Funding Caps:**

Contract Type	Project Cap
Single Employer	\$750,000
Single Employer Small Business	\$ 50,000
Critical Proposals	\$900,000
Multiple Employer (MEC)	\$950,000
MEC Apprentice Training: Per Sponsor††	\$450,000
††Projects with multiple sponsors may not exceed the MEC cap.	
*AB118: These caps will be determined on a case-by-case basis.	
*Amendments: Funding for active contracts may be increased, in conformity with these caps, on a case-by-case basis depending on performance.	
*Funding is limited to one contract per fiscal year.	
*Adjustments: The caps may be adjusted upward on a case-by-case basis with appropriate justification. In order to more equitably distribute funds, the Panel allocates funds to different types of contracts.	

(3)

▪ 4) **Funding Allocations:**

Project Type	Allocations
MECs	\$21,000,000
Single Employers	\$46,000,000
Small Business	\$6,000,000
Critical Proposals	\$6,000,000
Apprenticeship/ Non-Traditional	\$16,000,000
Total:	\$95,000,000

(4)

▪ 5) **Lowest Funding Priorities:**

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

- **6) Other Limitations:**
 - Cannabis Industry Moratorium
 - Support Costs for MECs default to highest percentage (8% retrainee training, 12% new hire training)
 - Employer Demand in MECs (60% with at least 80% prior performance, 80% with less than 80% prior performance)
 - Substantial Contribution defaults to lowest percentage (floor 15%-30%, ceiling 30%-50%).

DISCUSSION:

Mr. Broad said, we did the moratorium more on a temporary basis pending these cannabis companies getting licensed by the State of California. That's going to start in January so while I wouldn't necessarily consider them a Priority Industry, we can discuss where on the priority chain they are. I think the moratorium should not go forward after January 1. Is there any disagreement on the Panel about that? It is a business, it's a lawful business. If there are issues that are raised about it, we can deal with them as proposals come forward. There may very well be a system or merging industry coming from a place where it was completely illegal and it's actually quasi-legal now, only quasi. It remains illegal under federal law so we need to be careful, but at this point since it says these employers will be paying tax, that we should lift the moratorium.

Ms. Roberts said, recently we put in a stipulation that no one vendor will deliver more than 50% of the contract and I didn't know if we wanted to put that in there only because we had some issues there.

Ms. Testa said, would you like the cannabis section taken out of the plan?

Mr. Broad said, yes. Another thing I think we should have in terms of Lowest Funding Priorities would be commercial or light business skill training for partners or principals in professional firms.

Ms. Testa said, we did that in the Lowest Funding Priorities.

Mr. Broad said, okay great. I think we can leave it is a Lowest Funding Priority.

E: Economic Overview - pp. 7-8

- Describes the Statewide and Regional Area economic forecasts, with statistics from EDD's Labor Market Information Division and from UCLA's Anderson Forecast.
- Statewide, 9 of 11 of California's major non-farm industries have gained jobs in the past year, and unemployment has decreased. Payrolls are expected to continue to increase.
- There are still areas of California designated as High Unemployment Areas.

F: Priority Industries – pp. 8-13

- Lists and describes ETP's current Priority Industries, with labor market statistics.
- **ETP's Priority Industries:**
 - Agriculture
 - Allied Healthcare
 - Biotechnology and Life Sciences
 - Construction

- o Green/Clean Technology
- o Goods Movement and Transportation Logistics
- o Information Technology Services
- o Manufacturing
- o Multimedia/Entertainment
- o Technical Services

DISCUSSION:

Mr. Broad said, I would like to make this suggestion. It may be included under the Allied Healthcare, but I think under the current situation, perhaps it should be called out and that would be to include it as a Priority Industry - drug and alcohol rehabilitation. We are in the midst of opioid epidemic and alcoholism is a major social issue in this country. We have not done a lot of funding on this type of industry, but it would give our marketing people a direction to look into. Contact some of these associations that represent these types of employers and suggest they apply for funds. Does anyone have an objection to that? No objections were made.

G: Workforce Trends – pp. 13-15

- Explores six (6) main trends in the larger workforce arena:
 - o WIOA and its effect on labor policies in California
 - o Retirees re-entering the workplace
 - o Veterans
 - o Middle-Skilled Workers – those with more than a high school but less than a college education
 - o Automation and the Contingent Workforce – increase in job automation and its effect on the economy and labor market
 - o Sector Strategies – California Workforce Development Boards (CWDB) are developing statewide career pathways, and ETP is partnering with CWDB, LWDA, GO-Biz, EDD, California Energy Commission (CEC), and the California Community Colleges Chancellor's Office (CCCCO) to aid in this effort.

H: Strategic Initiatives – pp. 15-19

- Outlines seven (7) areas where ETP has created special programs to aid in job creation and retention, helping us to meet our mission. Some of these areas involve the addition of alternative funds, expanding ETP's contracting potential. The seven areas are as follows:
 - o Healthcare
 - o Addressing Climate Change
 - o Alternative & Renewable Fuel & Vehicle Technology Program (ARFVTP) – alternate funding available through an IA with the CEC
 - o Career Technical Education
 - o Apprenticeship Training Program
 - o Support for Veterans Serving Small Businesses

I: Strategic Alliances – pp. 19-21

- Describes six (6) areas where ETP has established or will be pursuing partnerships and collaborations to aid us in accomplishing our goals. These include:
 - o Marketing partnerships
 - o Apprenticeship Training Program – collaborations with California Labor Federation, the State Building and Construction Trades Council, the Division of Apprenticeship Standards, and LWDA's Apprenticeship Taskforce

- Governor's Interagency Group Working on Zero-Emission Vehicles – in coordination with GO-Biz
- Job Creation and Retention – with collaboration with GO-Biz
- State and Local Workforce Development Boards
- Rural and High Unemployment Areas – continued incentivizing for these areas

Appendix: Program Budget

- Presents ETP's 2017-18 Core Program Revenue and Expenditures
- Lists ETP's Budget Allocations to Program Categories including:
 - Program Funds
 - Marketing and Research
 - EDD Support
 - New Data Management System
 - Program Administration
- Lists sources of Alternative Funding available to ETP

Proposed Action:

- Staff recommends Panel approval of the ETP 2017-18 Strategic Plan, with the direction to staff to incorporate any desired changes, and with the delegation of authority to the Executive Director for final approval, prior to submitting the final Strategic Plan to both the Administration and Legislature.
- Any Questions?
- Thank you for your time!

Mr. Broad said, if there is no further discussion, let's take a vote on a conceptual approval of the Plan with the modifications we have discussed today, to include final approval by the Executive Director.

ACTION: Mr. Broad moved and Ms. Newsom seconded a conceptual approval of the Strategic Plan with modifications as discussed. Final approval by the Executive Director.

Motion carried, 8 - 0.

Mr. Broad said, regarding the cannabis issue, I propose we ask the staff to meet with some of the industry groups that are formed. We should ask the Director of the Bureau of Cannabis Regulation, Lori Ajax, to meet with us to explain how the industry is going to be regulated. Have staff solicit input from them about where they think training might be appropriate. For example, in terms of safety, regulations, tax compliance, ensuring that these drugs don't fall into the hands of minors. Possibly on the medical side of it there might be some training including what you can do and cannot do legally. Discuss what diseases you can cure or not cure health or not health, since this not a FDA approved medication you can easily cross the line. Conduct training in the area of regulatory compliance so that we can justify using our money to train employees and have this industry make the transition to a legal and highly regulated industry success.

Mr. Rodriguez said, I suggest it might be good to have the tax division at EDD share with us their best practice in collecting the UI tax from this industry. Mr. Broad said, that's a good

idea. This is an all cash industry now. There is no legal banking in this industry because of the federal prohibition. This means that state agencies are receiving truckloads of cash to pay their taxes. We must make sure that if we are training these employers, they are actually paying the tax. We will need to coordinate with EDD to make sure the employer is in tax compliance. We will have the staff come back to us with a set of recommendations on what to fund, what not to fund, how to protect the integrity of our program, and ensure that taxpaying employers are getting our money as opposed to those who may not be in tax compliance.

Ms. Riley said, staff does check on employer eligibility during the pre-application stage. We have access to the Employment Development Department wage database where we review the California employer account number to see if it is current. Unless you are subject to payment of the UI tax, you were not eligible for funding and not recognized as an eligible employer.

Mr. Broad said, all right thank you. That concludes our Agenda today. The only thing left would be public testimony is there anyone that wishes to come forward?

XI. PUBLIC COMMENT

Steve Duscha comes forward to speak. Mr. Chairman two issues, first I want to say that I am going to miss Ms. Riley for all the times that she agreed with my position. Ms. Riley has always been willing to listen, and willing to consider other people's other ideas, good ideas. I want to wish her the very best. Second, with regard to the committee that was established today. I hope jurisdiction and the interest of this committee is fairly broad and willing to listen to some of the broader issues that confront ETP, how they interact so that ETP can fulfill the statutory mission of supporting high wage, high skilled jobs for employers who are devoted to training on a long-term and on a large scale.

Phillip R. Herrera of Herrera & Company, came forward to speak. Two things, first, regarding the Strategic Plan, I would like to thank the staff for doing putting it together. Looking at it now there are sections that are new and fresh. Second, I have worked with Ms. Riley when she first came on and I've always appreciated her integrity. Her toughness has kept the program out of trouble. I just want to say thank you and you will be missed.

Eric Hilbersman of Studio Arts came forward to speak. Congratulations Ms. Riley. I wish you well and Mr. Rendon, you as well and thank you again for your service. I am here because there has been some discussion lately about rate change and I wanted to talk to you a little bit about the Priority Industry Advanced Technology rate that I propose. There are a lot changes in the entertainment industry right now. What is happening to the industry as a whole is a change in how entertainment is provided to the consumer. Among those things is change to virtual reality, augmented reality. It's in the beginning stage right now. Although I can't speak for content at this point, there is a great deal of interest in film and broadcast television. Game industries are gearing up for what could be a very elaborate change. We are not prepared with our current rate to buy some of the equipment we should be providing for this type of training. Even with the contribution from a lot of our companies that are participating in our MEC, it is not really adequate for the kinds of technological change that we are going to have to show people. I propose a possible rate change for Priority Industry in entertainment to \$32 an hour.

Mr. Broad said, certainly we can address that in the subcommittee.

Mr. Hilbersman said, is there some way that we can get feedback to the committee that was just formed today, in particular with respect to payroll companies, entertainment industry, and a significant contribution?

Mr. Broad said, I will obviously confer with the members of the subcommittee, but my intention was that this committee would operate in a more informal way so that some of these discussions can be more the neighbor heard of workshop discussions.

Mr. Hilsberman asked, we are invited? Mr. Broad said, yes, of course.

Mr. Hilsberman said, we want to get the word out to the entertainment companies and the producers of these various medias that are emerging about ETP. They are not familiar with the ETP program.

Don Tully, Integrated Solutions, I just want to thank Ms. Riley for all of her help and especially her accessibility and her willingness to listen. Thank you again and congratulations.

Mr. Broad said, Ms. Riley said we didn't vote on the Consent Calendar. Mr. Knox said, I asked for a motion and we did, but we could do it again. Mr. Broad said, let's re-vote on the Consent Calendar. We will call this the Maureen Riley sendoff vote. We will vote twice.

ACTION: Mr. Broad moved and all eight members of the Panel unanimously approved the Consent Calendar.

Motion carried, 8 - 0.

Mr. Broad said, before we adjourn I would like to take a moment of personal privilege to say something to our contractor community. This last week I became aware through a series of emails of one of our contractors getting, I would say, considerably out of line with our staff. I want you all to understand, and I'm not going to call anybody out, but this is not a sinecure. It's not an entitlement program for contractors, it's not a lock on anything, and basic respect for our staff is important and critical, just as basic respect for anyone you deal with is critical. I think our staff may, in the effort to be friendly and to deal with people that they work with all the time, allow themselves to get pushed around a little too much. They are very communicative, very easy to reach. My response to this is if you don't like the decisions of our staff, appeal them to the Panel. But further discussion about it is not appropriate. I would hate for us to go to that place, so I urge everyone in our contractor community to remember who you are. It is basic courtesy and respect, and respect for the difference in the jobs that you have and that other people have. Ms. Riley's job is not to be anybody's pal. She's not anybody's pal out there. Her job is to protect the program legally and she did her job. She did it well. If she didn't make friends with some people because of that, well that's the job. The job of our staff is to weigh these proposals against priorities and all the rules and regulations related to handing out this money. Sometimes they are not going to agree with you and when they don't, you have a choice: you can appeal or not appeal. We are happy to hear these appeals if that's the place we want to go. We will consider everybody's arguments and maybe the staff is right or maybe they're wrong, but whatever the course, the relationship should be one of mutual respect and appropriate distance and not inappropriate sort of familiarity. We all have our jobs to do. So with that I will adjourn the meeting. Thank you.

XII. MEETING ADJOURNMENT

Meeting adjourned at 11:07 a.m.

Single Employer Contractor

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

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

These features apply to core program funding.

Multiple Employer Contractor

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

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

Retraining

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

New Hire Training

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

These features apply to core program funding.

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 \$100,000 or less, and (2) single and multiple employer proposals for \$100,000 or less.
- This procedure allows projects to be approved on a flow basis. This process recognizes the need for just-in-time training, and reduces or eliminates the need for a Consent Calendar.
- An ETP130 and Curriculum is prepared for each proposal. They are reviewed and approved after the Executive Director signs off. The effective date will be the date specified by the Field Analyst and if no date is specified, the earliest effective date of contract is the day after the project is approved by the Executive Director.
- A copy of approved Delegation Orders is included in each month's Panel Packet, for projects approved prior to the Panel meeting, as an information item.



**TRAINING PROPOSAL FOR
Applied Technologies Associates, Inc.
18-0552**

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Mark Reeves
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 238,500.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 238,500.00	N/A	\$ 0.00	\$ 241,000.00

APPLICANT PROFILE

	Applied Technology Associates, Inc. (ATA) designs and manufactures oil industry technology products. The Company is located in Paso Robles.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 390	US: 1145	World Wide: 1700
Turnover Rate (Applicant)	12.00 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	No		

TRAINING PROFILE

Training Objective(s)	The training objectives for this proposal are to bring measurable improvements to ATA's production processes and to diversify various job functions through extensive cross-training.
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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	250	\$ 18.00	53	\$ 954	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1986 and located in Paso Robles, ATA manufactures oil industry technology products such as borehole surveying instruments (both gyroscopic and magnetic), MWD (measurement while drilling) systems, and production logging systems. The Company serves customers throughout the oil industry.

2. Current Training Project Details

Purpose of Training	<p>This will be ATA's second ETP contract, and the second in the last five years. In its first contract, the Company trained employees on clean room procedures and the new Enterprise Resource Planning system. Training in this proposal will be different. Training will not be duplicated.</p> <p>The oil industry is very challenging and competitive; technology constantly changes and customers demand more accurate and efficient software systems. To remain competitive, the Company must train on new technologies.</p> <p>Additionally, the Company must focus on new processes, including improvements in Lean environment and quality systems and cross-training to diversify trainee job functions. Process training will help employees operate and maintain equipment more efficiently, while solving problems more effectively.</p> <p>Training will take place at the Company's facility in Paso Robles. Instruction will be provided by in-house subject-matter experts and vendors with oil industry expertise.</p>
Training Infrastructure and Administrative Plan	<p>An internal project coordinator will oversee class scheduling and training documentation. The Company has retained an administrative consultant to ensure that all training records adhere to ETP requirements.</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

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Business Skills and Continuous Improvement. Assemblers, Engineering Staff, Maintenance Staff, Production Staff, and Technicians will receive Manufacturing Skills.	

4. Additional Company or Training Project Details

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Grants Intelligence Inc.	Suwanee, GA	No charge
Administrative	Training Grants Intelligence Inc.	Suwanee, GA	13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

The table below summarizes the active performance under the ETP contract.

Active Contract(s) Elements	Summary
Contract Number	ET16-0279
Purpose of Training	The training supported process improvements and system upgrades associated with the implementation of a new clean room and ERP system.
Location(s)	Paso Robles
Term	12/14/2015 - 12/13/2017
Approved Amount	\$296,298.00
Projected Earnings	\$235,000.00
Performance Percentage	79% (projected)
Trainee Details	279 (projected)
Other Notes	Based on ETP systems, 13,042 reimbursable hours have been tracked and 222 trainees have completed the minimum required 8 hours of training. All eligible hours have been uploaded to the ETP system.

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Business Operations
	Project Management
Continuous Improvement Skills	Kaizen
	Leadership
	Problem Solving
	Six Sigma
	Team Development
Manufacturing Skills (ME) (Standard)	Equipment Operations
	Equipment Safety
	Good Manufacturing Processes
	Lean Manufacturing
	Production Operations
	Quality Systems
	Reliability Processes



**Training Proposal for:
Arc Mid-Cities, Inc.**

Agreement Number: ET18-0150

Panel Meeting of: December 8, 2017

ETP Regional Office: North Hollywood

Analyst: L. Vuong

PROJECT PROFILE

Contract Attributes:	New Hire SET Multiple Barriers HUA	Industry Sector(s):	Services Priority Industry: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Counties Served:	Los Angeles, Orange, Riverside	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤0%		
Managers/Supervisors: (% of total trainees)	≤0%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$52,500		\$5,040 12%		\$57,540

In-Kind Contribution:	50% of Total ETP Funding Required	N/A
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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 HUA	Business Skills, Continuous Improvement, Computer Skills, Haz. Mat., Literacy Skills	15	8-260	0	\$3,836	*\$13.22
				Weighted Avg: 175			

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

Minimum Wage by County: New Hire, SET/HUA/Multiple Barriers: \$14.13 per hour for Los Angeles County; \$14.35 per hour for Orange County; and \$13.22 per hour for Riverside County.

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Warehouse Staff		10
Personal/Homecare Assistant		5

INTRODUCTION

Arc Mid-Cities, Inc. (AMC) (www.arcmidcities.org) seeks funding for New-Hire training as outline below:

AMC is eligible to contract with ETP as a training agency accredited by the Commission on Accreditation of Rehabilitation Facilities (CARF) training program to include warehousing, maintenance, recreation, janitorial, personal/homecare assistant and events management.

Founded in 1954, and headquartered in Los Angeles, AMC has training facilities located in Compton, Santa Ana and Moreno Valley. AMC is a non-profit entity dedicated to provide training and work opportunities for individuals with intellectual and developmental disabilities. AMC has seven core programs that have helped over 500 individuals live a productive life with dignity. Its programs include Adult Development, Community Integrated Behavior Management, Personal and Social Adjustment Services, Day Training, Employment Support, Work Activities and Transportation. Its goal is to provide vocational training programs, basic skills, social interaction, proper work behavior, work experience and job placement services to persons with disabilities and local businesses seeking qualified employees.

Since its inception, AMC has been providing a wide variety of training programs for its customers such as Home Depot, UPS, Dottie Industries, Sears Roebuck JC Penny, Southern California Special Olympics, City of Long Beach Parks and Recreation Department and Cal State University of Dominguez Hills. AMC continuously collaborates with local businesses and has been partnering with new employers such as Source America, Yamaha, Macy's, Yusen Logistics, Cycle Point Electronic Waste Management Services, Angelica Laundry Services, Sees Candy TJX Corp and Home Goods stores.

AMC is seeking funds to train and place unemployed individuals with multiple barriers to employment. This will be AMC's first ETP Agreement.

PROJECT DETAILS

Employer Demand

AMC staff reports an ongoing need for warehousing and homecare training from partnering employers. As an important part of the community, AMC works closely with local employers to be aware of and meet their needs for new employees. Over the years, AMC has established a network of companies that regularly contact them in search of qualified warehouse staff and direct care staff. AMC routinely receives job announcements from employers, which provide staff with tools to assess local business needs, working environments and other requirements dictated by the business community. AMC also reports that due to its reputation in the business community for maintaining qualified training programs, it is continually approached by employers seeking new workers. According to the Career Alert report, within the last few months, over 800 warehouse and personal home care services jobs have been posted in the Los Angeles area. Based on this information, AMC identified the need for warehousing and direct care training programs. AMC has placed 24 full-time trainees into employment in the last 12 months.

Training Plan

The proposed curriculum has been created according to AMC's outreach efforts to identify and assess employers' needs. The menu curriculum is designed to provide trainees with targeted skills that will increase opportunities to find suitable employment and perform to the employer's satisfaction. Training will also increase motivation, efficiencies, ability to adapt to new technologies, provide opportunities to develop and maintain functional skills and become stronger and more confident. Training will be delivered five days per week (Monday through Friday), eight hours per day. In addition to prepare trainees for employment, AMC also provides each student with individual career counseling, interviewing skills and resume writing skills.

Training will take place at AMC's facilities in Los Angeles, Compton, Santa Ana and Moreno Valley. Training is scheduled to begin upon Panel approval.

Business Skills – This training will be offered to all occupations to improve communication skills, customer relations and handle basic paperwork including records, counting methods and reports.

Computer Skills – This training will be offered to all occupations to fully utilize basic computer software applications and operate database systems.

Continuous Improvement – This training will be offered to all occupations to promote teamwork, improve workflow, problem solving, and goal setting.

Hazardous Materials – This training will be offered to Warehouse Staff. Trainees will learn proper techniques and knowledge for handling chemical and waste cleanup including hazardous materials.

Literacy Skills – This training will be offered to all occupations. Training will enable trainees with limited English skills to increase their speaking, listening and comprehension skills in the workplace.

Impact/Outcome

AMC anticipates assisting trainees to prepare for Warehouse Management, Forklift Operation, Homecare Consumer Satisfaction and Trainee Retention Certifications. These certifications often lead to new employment opportunities, wage increases and career advancement.

Trainer Qualifications

AMC has identified a team of two in-house trainers with a minimum of 12 years field experience. The trainers are certified by the state of California, Department of Developmental Disabilities Services and Professional Warehouse Management and Operations. Outside professional experts may be used only if specific technical skills are required and unavailable internally.

Training Coordinator

AMC has five staff members including an Executive Director to be responsible for all administrative responsibilities, including coordinating marketing, recruitment, assessments and scheduling and tracking training. In addition, AMC has retained an outside administrative consultant to assist with administration and ensure that all training records documentation requirements are met.

Special Employment Training/ High Unemployment Area

Under Special Employment Training (SET), a participating employer is not required to demonstrate out-of-state competition, and trainees are not required to meet eligibility standards for new hire training.

➤ Multiple Barriers

Trainees in this proposal (New Hire) work in an HUA and must be hard-to-serve individuals with multiple barriers to employment. Trainees will have two or more barriers to employment (e.g., mental or physical disability, limited English proficiency and limited math skills).

➤ HUA

Additional, these trainees will be placed and work in a High Unemployment Area (HUA), with unemployment exceeding the state average by at least 25%. These companies are located in Carson, Commerce, Compton, Inglewood and Moreno Valley, which are HUA.

➤ Wage Modification

For these trainees, the Panel may modify the ETP Minimum Wage by up to 25%. AMC is requesting a wage modification to the SET/HUA New Hire Wage ranging from \$14.35 to \$13.22.

➤ Retention Modification

These trainees will be placed in employment in High Unemployment Area's. Retention period for trainees in HUA may be modified to 90 days out of 120 consecutive days with up to three employers. AMC requests this retention modification.

Marketing, Recruitment and Support Costs

AMC has a well-established marketing and recruitment program to increase community awareness and employer/employee participation in its workforce development programs. Staff works closely with local businesses, vocational schools, community colleges, WorkSource centers, South Bay Workforce Investment Board, Workforce Training and Transitional Employment Program and County of Los Angeles GAIN Program. Staff uses outreach methods such as social media, participation in local job fairs and direct recruitment at local schools and community centers. AMC has five staff dedicated to marketing, recruiting, assessment, scheduling and training; therefore, AMC requests an additional 12% of ETP funding in the proposed agreement to fund extensive marketing efforts to recruit additional participating employers and assessment activities. Staff believes 12% support costs are justified in this proposal.

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 including modifications to the minimum wage, retention, incidental placement and support costs.

DEVELOPMENT SERVICES

Diversity Research and Consulting Group, Inc. in Rolling Hills Estates assisted with development of this proposal for a flat fee of \$3,500.

ADMINISTRATIVE SERVICES

Diversity Research and Consulting Group 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

8-260

Trainees may receive any of the following:

WAREHOUSE STAFF

BUSINESS SKILLS

- Business Communications Skills
- Business Etiquette
- Customer/Patient Services
- Performance Management and Improvements
- Understanding the Business of Warehousing
- Contracts Performance

COMPUTER SKILLS

- Microsoft Applications
- Warehouse Management Software

CONTINUOUS IMPROVEMENT

- Role of the Warehouse in the Supply Chain
- Inventory Control
- Warehouse Practices
- Warehouse Procedures and Standards
- Warehouse Management – Service vs. Cost
- Warehouse Technologies/Equipment
- Functions and Role of Warehouse Management Systems (WMS)
- Productivity Standards
- Performance Indicators and Control Methods
- Critical Thinking
- Problem Solving
- Leadership Development
- Team Building
- Job Performance/Development
- Warehouse Safety Fundamentals
- Non-Verbal Skills Development/Body Language

HAZARDOUS MATERIALS

- Hazardous Materials Handling and Precautions
- Hazardous Chemical and Waste Cleaning

LITERACY SKILLS

- Basic Workplace English and Math
- Warehouse Terminology
- Effective Writing and Communications

PERSONAL/HOMECARE ASSISTANT**BUSINESS SKILLS**

- Business Communications Skills
- Business Etiquette
- Customer/Patient Services
- Performance Management Skills
- Understanding the Business of Direct Care Services

COMPUTER SKILLS

- Microsoft Applications
- Case Management Software

CONTINUOUS IMPROVEMENT

- Patient Assessment and Care Plan
- Charting and Documentation
- Individualized Patient Plan Development
- Safe Management Techniques (slips and falls, safe transfer of patients)
- Activities of Daily Living and Instrumental Activities of Daily Living
- Patient Hygiene
- Care of Patients with Dementia/Mental Illness/Mental Retardation
- Gerontology and Normal Aging
- Nutrition, Food Handling and Sanitation
- Recreation, Socialization, Community Resources, Social Services and Activities in the Community
- Meeting the Care Needs of Residents in a Culturally Diverse Environment
- Infection Control
- Non-Verbal Skills Development/Body Language
- Care for Individuals with Mobility Needs
- Critical Thinking
- Problem Solving
- Leadership Development
- Team Building
- Job Performance/Development

LITERACY SKILLS

- Basic Workplace English and Math
- Healthcare Terminology
- Effective Writing and Communications

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

Note: Reimbursement for new hire training is capped at 260 total training hours per trainee



**TRAINING PROPOSAL FOR
Armstrong Garden Centers, Inc.
18-0509**

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Margarita Paccereilli
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$167,900.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$167,900.00	N/A	\$0.00	\$210,000.00

APPLICANT PROFILE

Company Summary	Armstrong Garden Centers, Inc. (AGC) supplies retail locations, independent garden centers, commercial accounts, resorts and golf courses throughout most of the Southwest and Pacific Northwest.
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Industry Sector(s)	Agriculture		
Priority Industry	Yes		
No. Employees (Applicant)	State: 582	US: 789	World Wide: 789
Turnover Rate (Applicant)	0.53 %		
Repeat Contractor	Yes		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will provide workers with new product knowledge and upgraded skills to ensure further growth and a stable future for all employee-owners.
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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	151	\$18.00	50	\$900	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	20	\$20.00	80	\$1,600	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1889 and headquartered in Glendora, AGC is an employee-owned company with over 200 acres of growing and production facilities in California serving the horticultural industry for over 125 years.

AGC is also a certified organic grower and produces hundreds of thousands of vegetables and herbs for growing and consumption. Its retail division serves as a distribution and selling point for most of the product grown and produced by AGC. In 2014, AGC purchased Pike Nurseries in Atlanta and North Carolina. With 49 locations, the Company is currently the largest employee-owned garden retail in the United States. Trainees at its 36 California locations will participate in training.

2. Current Training Project Details

Purpose of Training	<p>This will be the AGC's second ETP Agreement, and the second in the last five years. The prior project focused on its inventory management system, improvement of plant material and product mix, introduction of drought and irrigation advancements, and implementation of continuous improvement techniques to bring consistency throughout the organization. This new proposal focuses on the expansion of its product offerings in its soil and fertilizers, which accounts for its highest sales. This proposal will provide trainees with the knowledge in its new product offerings including product details and customers service.</p> <p>The nursery industry has evolved over the last several years as the number of large and online retailers claiming more market share. To remain competitive, AGC has also expanded its Landscape Design. For this expansion, AGC is committed into hiring and training 20 newly-created positions to learn various areas of landscape design, growing techniques, and equipment operations.</p> <p>To keep its market share, AGC must reduce production costs, improve distribution efficiency, and raise quality standards. ETP funds will assist AGC to meet customer demands, remain competitive and ensure project integrity.</p>
Training Infrastructure and Administrative Plan	AGC's Vice President of Human Resources will oversee training and project administration. The Company has several in-house experts at each facility to coordinate and provide training at all locations. In addition, AGC has retained an administrative consultant to assist with recordkeeping.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

Substantial Contribution Description	N/A
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3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Class/Lab training in Business, Commercial, Computer and Continuous Improvement Skills. Managers and Assistant Managers will receive Management training.	

4. Additional Company or Training Project Details

Retrainee-Job Creation

The Panel offers incentives to companies that commit to hiring new employees. Training for newly-hired employees will be reimbursed at a higher rate and trainees will be subject to a lower post-retention wage. To remain competitive, AGC has expanded its Landscape Design. For this expansion, AGC is committed into hiring and training 20 newly-created positions to learn various areas of landscape design, growing techniques, and equipment operations.

Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. Newly hired employees will be reimbursed at a higher rate and subject to a lower post-retention wage. Trainees will be hired into “net new jobs” as a condition of contract.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

AGC has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Downey, Smith & Fier	Lakewood	No Charge
Administrative	Downey, Smith & Fier	Lakewood	13% of payment earned
Training	N/A	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Active ETP Project Summary

The table below summarizes the active performance under the ETP contract.

Active Contract(s) Elements	Summary
Contract Number	ET16-0360
Purpose of Training	Advance its inventory management system, improve plant material and product mix, introduce drought and irrigation advancements, and implement continuous improvement techniques to bring consistency throughout the organization. Although some course topics may be similar, but no trainee will receive duplicate training.
Location(s)	Statewide
Term	01/19/2016 – 01/18/2018
Approved Amount	\$117,674
Projected Earnings	\$117,674
Performance Percentage	100%
Trainee Details	Retrainee; Job Creation
Other Notes	Based on the ETP Systems, 6,690 reimbursable hours have been tracked for potential earnings of \$117,674 (100% of approved amount).

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Leadership
	Product Knowledge
	Project Management
	Sales Skills
Commercial Skills (Standard)	Equipment Operations
	Growing Techniques
	Horticultural Science
	Inventory Control
	Planting
Computer Skills (Standard)	Microsoft Office Suite (Advanced & Intermediate)
	POS System
Continuous Improvement Skills	Growing Improvement
	Process and Quality Improvement
Management Skills	Management Training



**TRAINING PROPOSAL FOR
Capstone Fire Management, Inc.
18-0500**

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Maria Ibarra
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:		\$ 74,800.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 74,800.00	N/A	\$ 0.00	\$ 125,000.00

APPLICANT PROFILE

Company Summary	Capstone Fire Management, Inc. (Capstone Fire) (www.capstonefire.com) provides industrial fire, wildland fire, confined space rescue consulting, and technical rescue solutions services.
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Industry Sector(s)	Waste Management		
Priority Industry	No		
No. Employees (Applicant)	State: 68	US: 68	World Wide: 68
Turnover Rate (Applicant)	12.00 %		
Repeat Contractor	No		
High Unemployment Area	No		

Union(s)	N/A
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TRAINING PROFILE

Training Objective(s)	Capstone Fire will provide new software and life-saving techniques, and project/time management training to improve efficiencies and help the Company remain competitive within the industry, keeping pace with changing codes and environmental improvement standards.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Owner, Retrainee	1	\$22.00	50	\$ 1100	8 - 60
1	Retrainee	67	\$22.00	50	\$1100	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1989 and headquartered in Escondido, Capstone Fire provides onsite industrial fire services, wildland fire prevention, suppression standby, and emergency response support services. The Company also provides technical and confined space rescue consulting for public and private entities seeking to mitigate costs and potential liability exposures to fire and related incidents. Customers include wind and solar companies, natural gas storage facilities, power generation facilities, electric/utility companies, refineries, terminals, drilling operations, chemical processing facilities, pipeline companies, manufacturing and corporate facilities, and government.

2. Current Training Project Details

Purpose of Training	<p>The fire, rescue, and emergency medical services (EMS) industry is highly competitive. Due to new and changing regulations and chemical hazards and increasing customer requirements, Capstone Fire must gain efficiencies in all areas of fire life safety processes. The Company will be implementing a strategic initiative to improve operational efficiencies by leveraging technology to improve internal systems. The Company will be integrating Human Resources Information System and Field Management System with the Company's existing Customer Relationship Management (CRM) System to streamline scheduling/dispatching, field notes, and billing processes. The Company will also improve operational efficiencies through process improvements. Training will provide workers with necessary skills to improve operations and competently administer fire, rescue, EMS, and safety processes and procedures. Training will also improve the standard of care and approach to life support procedures to keep pace with regulatory standards, meet customer requirements, and maintain competitiveness.</p> <p>Capstone Fire will also be purchasing new rescue equipment, including air/gas monitors and other life-saving devices. Training is not included in the purchase price.</p>
Training Infrastructure and Administrative Plan	<p>Capstone Fire retained an administrative subcontractor to assist with ETP project administration. In addition, the Company's President, Training Director, and Department Lead, will schedule and coordinate ETP training, collect rosters, and meet with ETP staff during monitoring meetings.</p> <p>The Company continually provides a minimum of 24 hours of Emergency Medical Services (EMS), 40 hours of technical rescue, and 80 hours of fire training to its workers annually. The nature of its business requires the Company to constantly train staff in the latest regulations, equipment, and standards of care. Training will be conducted by in-house subject-matter experts and, if necessary, vendors. The Company is ready to start ETP-funded training at contract approval.</p>

PROPOSED TRAINING PROJECT DETAILS

Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training in Business, Commercial, Computer, and Hazardous Materials Skills (courses listed in Attachment 2) will be provided to all occupations.	

4. Additional Company or Training Project Details

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$2,900.00
Administrative	Training Funding Source	Seal Beach	Not to exceed 13% of earned funds
Training	To Be Determined	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication/Conflict Resolution
	Customer Service
	Leadership
	Administrative Processes & Procedures
	Sales Skills
	Time Management
	Workplace Processes & Procedures
Commercial Skills (Standard)	Emergency medical skills
	Field Procedures
	Fire Command skills
	Firefighter (Wildland and Structural) Skills
	Technical Rescue Skills
Computer Skills (Standard)	Field Management System (Field FX)
	Customer Relationship Management System (Salesforce)
	Human Resources Information System (Paycom)
	Microsoft Office
	Quickbooks
Hazardous Materials Skills	Hazard Recognition/Initial Response
	HazMat operations



TRAINING PROPOSAL FOR
Cicon Engineering, Inc.
18-0538

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Margarita Paccarelli
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	
\$109,440.00	N/A	\$0.00	\$250,000.00

APPLICANT PROFILE

Company Summary	Cicon Engineering, Inc. (Cicon) manufacturers wire harness and cable assemblies.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 420	US: 421	World Wide: 421
Turnover Rate (Applicant)	1%		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will help staff provide high-quality cable products to remain competitive with out-of-state manufacturers who provide products at lower costs.
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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	304	\$18.00	20	\$360	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1988, Cicon creates build-to-print cable assemblies and flight harnesses for customers such as Northrop Grumman, Raytheon, Boeing and Lockheed-Martin. The Company is certified AS9100 and International Traffic in Arms Regulations (ITAR) compliant.

This will be Cicon's first ETP Agreement. Headquartered in Van Nuys, Cicon has three other locations (two in Chatsworth and one in Canoga Park). All locations will participate in training.

2. Current Training Project Details

Purpose of Training	<p>To remain competitive, employees must be trained in NASA standards, military specifications and customer specific processes.</p> <p>Training will focus on MIE Solutions, a newly acquired ERP software. The system will capture more data and provides more outputs for all internal tracking. This includes designs, purchasing/issuing material, scheduling, quality, document control and sales. It is designed to share all information between all modules to streamline the business.</p> <p>As aerospace and space designs are constantly evolving, employees must also be trained on new customer demands. NASA standards require yearly training in polymeric application, soldering and crimping. As new technology emerges, training is necessary to create a more efficient production system.</p>
Training Infrastructure and Administrative Plan	<p>Cicon's General Counsel will oversee the ETP project. Human Resources staff will oversee scheduling, training, delivery, and documentation at all locations. Training will be delivered by subject matter experts and vendors as needed.</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	
All occupations will receive Business, Commercial, Computer, Continuous Improvement and Manufacturing Skills.	

4. Additional Company or Training Project Details

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 training, curriculum and program characteristics.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Contracting In Aerospace
	Negotiations
Commercial Skills (Standard)	ITAR/EAR Training
Computer Skills (Standard)	ERP System
Manufacturing Skills (ME) (Safety)	OSHA 10/30
Manufacturing Skills (ME) (Standard)	Age Sensitive Material
	Blueprint Reading Basics
	Calibration & Amp; Verification
	Cleaning of Manual Soldering
	Coax Assemblies
	Configuration Management
	Control of Documents
	Control of Nonconforming Product
	Control of Records
	Control of Work Transfers
	Controlled Clean Area
	Corrective Action
	Counterfeit Parts Avoidance, Detection, Mitigation and Disposition
	Crimping
	Electro Static Discharge
	Export Compliance (ITAR)
	Foreign Object Debris
	Foreign Object Elimination Program, Ref. NAS412
	Group Shielding
	Hand Cabling
	In-Process Rejections
	IPC/ WHMA-A-620 Cable & Wire Harness
	IPC/ WHMA-A-620 Cable & Wire Harness Space
	J-STD-001 Soldering
	J-STD-001ES Soldering Space
	Jacketing
	Lugging
	Material Handling
	Measurement, Analysis, Improvement - General
	Molding
	Monitoring and Measurement - Customer Satisfaction
NASA 8739.1 Polymeric Applications - Space	
NASA 8739.3 Soldering - Space	
NASA 8739.4 Crimping - Space	

Attachment 2 - Training Delivery and Curriculum Listing

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

Planning Documentation (Traveler / Planning Book)
Potting
Pre-Woven and Direct Applied Braiding
Preventative Action
Requirements for Controlled Area
Risk Management
Shield Termination
Solder Inspection
Soldering Rework
Soldering Techniques
Splicing
Tinning
Wire Harness Assembly
Wire Stripping & Amp; Preparation



**TRAINING PROPOSAL FOR
CONCRETE VALUE CORP.
18-0502**

Panel Meeting Date: December 8, 2017
Regional Office: Sacramento Regional Office
Analyst Name: Karen Mam
Type of Proposal: Single Employer
Funding Source: Out of State Competition, SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 247,140.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 247,140.00	N/A	\$ 0.00	\$ 300,000.00

APPLICANT PROFILE

Company Summary	Headquartered in Sacramento, Concrete Value Corp. (CVC) (www.cvconstruction.com) is one of the nation's largest concrete subcontractors specializing in commercial, residential, and exterior site construction services.
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Industry Sector(s)	Construction		
Priority Industry	Yes		
No. Employees (Applicant)	State: 550	US: 700	World Wide: 700
Turnover Rate (Applicant)	14.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	CVC's training plan will focus training on their 7-step concrete pouring processes to improve employee skillset and quality of work.
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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	430	\$ 18.00	27	\$ 486	8 - 200
2	Retrainee – Job Creation Initiative Program	53	\$ 20.00	36	\$ 720	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

CVC proposes to serve as the lead employer in a single employer proposal contract with its affiliates CVC Commercial Corp. and CVC Equipment, LLC as follows:

Founded in 1997, CVC is a concrete subcontractor that specializes in commercial and residential concrete services such as tilt-up structures, retaining walls, foundations, sidewalks, curbs, demolition and removal. CVC serves retail shopping centers, warehouses/distribution centers, multi-story office buildings, residential customers, and local municipalities. All of CVC's four locations in Sacramento, Fresno, Bakersfield, and Salinas will participate in training.

This Agreement will also include two of CVC's affiliated entities, CVC Commercial Corp. and CVC Equipment, LLC. CVC Commercial Corp also provides concrete construction services and will have their only location in Sacramento participate in training. CVC Equipment, LLC provides heavy construction equipment rentals to consumers and to CVC for their projects. CVC Equipment, LLC will have their two locations in Elverta and Dixon participate in training. CVC Equipment LLC is eligible for the Special Employment Training (SET) funding provisions.

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>This is CVC's first ETP Agreement. As demand for the Company's services increases, CVC needs a formalized training plan to deliver a high level of service.</p> <p>CVC will be implementing a new comprehensive training program, WIN (What's Important Now). The training program will focus on the Company's 7-step process of concrete pouring and construction skills. The training program will address any deficiencies within its workforce and allow the Company to standardize its processes. This will improve the quality of work, lead to better feedback from customers, and, ultimately, lead to a further increase in the demand for services.</p> <p>In addition, the Company has recently invested \$3M in new specialized equipment including concrete pumps, backhoes and dump trucks. Staff will be trained on proper operation procedures and techniques to utilize the new equipment properly.</p>
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PROPOSED TRAINING PROJECT DETAILS

Job Creation	<p>ETP provides incentives to companies that hire new employees including a higher Reimbursement Rate.</p> <p>CVC needs to increase its workforce to support newly purchased equipment and increased demand for services.</p> <p>CVC will hire 53 net new employees (Group 2). The Company will be placing new employees in Administrative, Concrete, Labor, Operations and Manager/Supervisor occupations. To qualify for Job Creation, trainees must be hired within the three-month period prior to Panel approval or during the term of contract.</p>
Training Infrastructure and Administrative Plan	<p>CVC Equipment, LLC is expanding their Dixon location by 6,500 sq. ft., which includes training classrooms and testing sites for staff to train on various equipment. Trainees will practice with equipment and observe various phases of the concrete processes at this new training center. The Company has a detailed training plan for its 7-step process of concrete pouring. CVC will utilize in-house subject matter-experts to train staff.</p> <p>Three division managers will oversee training at all participating locations and the support staff dedicated to coordinating training efforts. Management at all locations are prepared to implement CVC's training plan and are aware of the ETP record keeping requirements. Each division manager and their support staff will be responsible for collecting rosters and ensuring compliance with all ETP record keeping requirements. In addition, the Company has retained the services of a third-party administrator, Sierra Consulting Services, to assist with project administration.</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 (Attachment 1) will receive training in Business, Computer, Continuous Improvement, Commercial, Management, and Hazardous Materials Skills. Literacy Skills training will be offered to staff whose native language is not English.</p>	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
All occupations will receive E-Learning training in Business, Computer, Continuous Improvement, Commercial, and Hazardous Materials Skills.	

Delivery Method/Level	Productive Laboratory
Summary	
Concrete and Labor occupations will receive Productive Lab (PL) training in Commercial Skills. Training will be delivered with a 1:3 trainer-to-trainee ratio. A 1:3 ratio is necessary due to the nature of concrete pouring and finishing processes with rapid drying rate requiring a crew of three. PL training hours are capped at 40 hours per trainee.	

4. Additional Company or Training Project Details

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

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	Sierra Consulting Services	Cameron Park	\$ 15,000
Administrative	Sierra Consulting Services	Cameron Park	For a fee not to exceed 13% of funding earned
Training	To be Determined	N/A	N/A

4.3 Previous ETP Project Summary

CVC has no prior ETP Agreements.

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication Skills
	Conflict Resolution
	Cost Control
	Customer Relationship Management
	Customer Service
	Dealing with Difficult People
	Employee Coaching
	Financial Analysis
	Leadership
	Marketing/Sales Techniques
	Negotiations
	Planning and Organization
	Product Knowledge
	Project Management
	Project Requirements Analysis and Specifications
	Strategic Planning
Time Management	
Commercial Skills (Standard)	Blue Print Reading
	Concrete Pouring Techniques
	Finisher Training
	Flatwork Formset
	Footing Pour Training
	Forklift Driving
	Formset Training
	Grade Training
	Inventory Control
	Layout Training
	Logistics
	Measurement and Measuring Devices
	Mechanic Training
	Pump Operator Training
	Read CVC Cards
	Steel Training
	Strip and Grind Training
	Tool Operation
	Troubleshooting
	Warehousing
Computer Skills (Standard)	Advanced Microsoft Office
	Intermediate Microsoft Office

Attachment 2 - Training Delivery and Curriculum Listing

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

Continuous Improvement Skills	5S
	Change Management
	Creating a Quality Organization
	Creating Continuous Flow
	Decision Making
	Kaizen Training
	Key Performance Indicators
	Lean Procedures Practices
	Problem Solving
	Process Improvement
	Product Quality and Control
	Production Operations/Workflow
	Production Scheduling
	Quality Measurement Systems
	Root Cause Analysis
Team Building	
Understanding Waste	
Hazardous Materials Skills	Hazardous Materials Handling
Literacy Skills	Basic Math
	Vocational English
	Vocational English as a Second Language:
Management Skills	Coaching Procedures
	Motivation
	Team Building

Delivery Method /Level	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication Skills
	Conflict Resolution
	Cost Control
	Customer Relationship Management
	Customer Service
	Dealing with Difficult People
	Employee Coaching
	Financial Analysis
	Leadership
	Marketing/Sales Techniques
	Negotiations
	Operational Skills
	Planning and Organization
	Product Knowledge
	Project Management
Project Requirements Analysis and Specifications	

Attachment 2 - Training Delivery and Curriculum Listing

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

	Strategic Planning
	Time Management
	Train the Trainer
Commercial Skills (Standard)	Blue Print Reading
	Concrete Pour Techniques
	Finisher Training
	Flatwork Formset
	Footing Pour Training
	Forklift Driving
	Formset Training
	Grade Training
	Inventory Control
	Layout Training
	Logistics
	Measurement and Measuring Devices
	Mechanic Training
	Pump Operator Training
	Read CVC Cards
	Steel Training
	Strip and Grind Training
	Tool Operation
	Troubleshooting
	Warehousing
Computer Skills (Standard)	Advanced Microsoft Office
	Intermediate Microsoft Office
Continuous Improvement Skills	5S
	Change Management
	Creating a Quality Organization
	Creating Continuous Flow
	Decision Making
	Kaizen Training
	Key Performance Indicators
	Lean Procedures Practices
	Problem Solving
	Process Improvement
	Product Quality and Control
	Production Operations/Workflow
	Production Scheduling
	Quality Measurement Systems
	Root Cause Analysis
	Team Building
	Understanding Waste
Hazardous Materials Skills	Hazardous Materials Handling

Attachment 2 - Training Delivery and Curriculum Listing

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

Literacy Skills	Basic Math
	Vocational English
	Vocational English as a Second Language:
Management Skills	Coaching Procedures
	Motivation
	Team Building

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>	
Training Type (Level)	Planned Course Offerings	
Commercial Skills	Assembly Procedures	
	Blue Print Reading	
	Equipment Operation	
	Finisher Training	
	Flatwork Formset	
	Footing Pour Training	
	Formset Training	
	Grade Training	
	Layout Training	
	Pump Operator Training	
	Steel Training	
	Strip and Grind Training	
	Tool Operation	
PL Justification and Details		
Explain the need for productive laboratory (PL) training	Concrete and Labor will need PL in Commercial Skills. Pouring concrete is a very technical skill since it involves different mixes, different amounts of water, accelerator chemicals, different size rebar bent in varying degrees and many other technical skills. If it's not done correctly, the whole concrete foundation can be lost which is very expensive and then the process will need to be started new.	
Describe the Equipment/Processes to be used in delivering the PL training	It will involve concrete pumps, hand tools, rods, bullfloats, concrete vibrators, rebar bending devices, finishing tools. We have 7 steps in completing a concrete foundation that include: 1) Layout - setting up the foundation, surveying land, layout foundation, strings, 2) Trenching 3) Formset – looking at a set of prints, carpentry, put wood frame around the foundation),4) Steel placement - rebar floor), 5) Footing pour, 6) Grading – recipe/mixing of ingredients such as pea gravel and viscquen	
Describe Trainer Qualifications	All of our trainers are seasoned foreman with years of experience of pouring concrete. They know all of the various best practices of our 7-step process.	
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	3
Ratio for Maximum Ratio When More than One Class	1	3
PLT Approval	Yes	



**TRAINING PROPOSAL FOR
CPH Hospital Management, LLC
17-0770**

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Elsa Wadzinski
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:		\$ 172,800.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 172,800.00	N/A	\$ 0.00	\$ 20,000.00

APPLICANT PROFILE

Company Summary	CPH Hospital Management, LLC dba Coast Plaza Hospital (CPH) (www.avantihospitals.com/coast-plaza-hospital) is a subsidiary of Avanti Health System, LLC. CPH is an accredited general acute care medical and surgical hospital. This will be CPH's third ETP Agreement, third in the last five years.
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Industry Sector(s)	Healthcare		
Priority Industry	Yes		
No. Employees (Applicant)	State: 1,400	US: 1,400	World Wide: 1,400
Turnover Rate (Applicant)	15.00 %		

Repeat Contractor	Yes
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	CPH is working to increase the quality of care, lower costs, improve program integrity and make its health care system more effective, simple and accessible.
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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	128	\$ 18.00	75	\$ 1350	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1957 and headquartered in Norwalk, CPH is an accredited general acute care medical and surgical hospital with 117 licensed beds. The hospital also offers a 24-hour emergency department, an Alzheimer's program, cardiac care, cosmetic surgery critical care, diabetes care, hyperbaric oxygen, pain management, pharmacy, respiratory care, weight-loss, and wound care. Primary customers are adult patients located in Norwalk and the neighboring cities.

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>Many aging staff have left, or plan to leave CPH's employ, leaving positions to be filled. Training will address new and upgraded skills necessary for employees to succeed and excel. Additionally, the demand for staffing has led to the hiring of new employees, as well as newly graduated RN's. As all hospitals have different operating requirements, staff will need training to meet CPH's internal operating procedures. Training will also focus on new advances in technology, processes and treatments used in the healthcare industry.</p> <p>In addition, this facility has recently become a primary stroke center. Emergency Department staff, Intensive Care Unit and Telemetry unit's staff will require training to meet Joint Commission requirements.</p> <p>CPH's current training budget is \$25,000 per year.</p>
Training Infrastructure and Administrative Plan	The Chief Nursing Officer will oversee ETP training. Department Nursing Directors and Nurse Managers will coordinate with Human Resources, Education and Administration to implement training and administer the project. Training will be provided by in-house subject matter experts and vendors to be determined later.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	Although CPH has earned \$370,340 in the prior two Contracts (ET15-0475 and ET12-0285) within the last five years, \$137,491 of the funding was for Job Creation training which is not subject to a substantial contribution. Therefore, there is no substantial contribution in this Agreement.

PROPOSED TRAINING PROJECT DETAILS

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations may receive Class/Lab training in Business Skills, Computer Skills and Continuous Improvement. Only Nursing, Tech and Therapist occupations will receive Medical Skills (Didactic) training.	

Delivery Method/Level	Productive Laboratory
Summary	
RNs and LVNs may receive Medical Skills Clinical Preceptor training to demonstrate efficiencies of advanced clinical processes learned in the classroom.	

4. Additional Company or Training Project Details

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

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET15-0475	Norwalk	06/30/15 – 06/29/17	\$150,336	\$150,336	100%
ET12-0285	Norwalk	02/06/12 – 02/05/14	\$300,090	\$220,004	73%
Notes	ET12-0285 earnings in the amount of \$137,491 was for training in Job Creation.				

PROPOSED TRAINING PROJECT DETAILS

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication
	Customer Service
	Project Management
Computer Skills (Standard)	Accounting & Payroll Software
	Electronic Medical Records
	Microsoft Excel Intermediate
	Patient Safety Event Reporting
	Telemedicine
Continuous Improvement Skills	Charge Nursing Training
	Communication Skills
	CORE Measures
	Critical Thinking Skill
	Culturally Appropriate Care
	Customer Service Skills
	Documentation Skills
	Frontline Leadership Skills
	Improving Observation and Reporting Skills
	Management of Assaultive behavior
	Performance & Quality Improvement
	Preceptor Skills
	Preventing Hospital Readmissions
	Relationship Building
Medical Skills (didactic)	Care of Pediatric patients
	Emergency Room Nursing Skills
	Intravenous Therapy
	Triage Nursing Skills

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Medical Skills (preceptor)	Hemodynamic Monitoring
	Pre and Post-Operative Care
	Prevention of Aspiration and Dysphagia Screen
	Ventilator and Tracheotomy Care
	Age Appropriate Care
	Anticoagulation
	Application of Chain of Command in Clinical Settings
	Blood and Blood Products Administration and Care
	Blood Safety and Conservation
	Cardiac Rhythms and Dysrhythmias
	Central Venous Catheter Dressing care and Change Procedure

Attachment 2 - Training Delivery and Curriculum Listing

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

Comfort Measures and Pain Management
Concepts of Infection Control
Coordinating Patient Care
End of Life/Palliative Care
Fall Prevention
Gastro-Intestinal Training
Improving Patient Safety and Reducing the Risk of Suicide
Infection Prevention and Sepsis Management
Management of Assaultive Behavior
Managing ICP Monitored Patients
Managing Patient Pain
Moderate Sedation/Analgesia
Modified Rankin Scale
Nursing Skills Applicable to Medical-Surgical and/or Critical Care Nursing
Organization and Delegation
Overview Trauma in Pediatric, Pregnant and Geriatric
Pain Assessment and Management
Pain Management (Acute and Chronic)
Pain Medication and Non-Pharmacological Pain Management
Patient and Family Education
Patient Assessment and Management/Care
Patient Handoffs
Patient Safety Alert
Peripheral and Central Line IV Therapy
Preceptor Training (role, responsibilities, assess)
Preventing Multiple Drug Resistant Organisms
Preventing the Spread of Infection
Prevention of Catheter Associated Urinary Tract Infections
Radiation and MRI Safety
Recognition of Sepsis
Restraint Use
Safe Medication Administration
Safe Patient Environment
Sepsis Prevention and Education
Strategies to Reduce/Prevent Ventilator Associated Pneumonia
Trauma Care After Resuscitation
Tube Feeding Care and Management
Vascular Access
Ventilator and Tracheostomy Care
Your Role in Preventing the Spread of Multiple Drug Resistant Organisms

<i>PL Justification and Details</i>	
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Explain the need for productive laboratory (PL) training	The productive laboratory training provides trainees hands-on learning with the benefit of an instructor guiding them through the process. Learning from a preceptor/supervisor/instructor in the work environment provides the most functional information required to succeed in the role.
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Attachment 2 - Training Delivery and Curriculum Listing

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

	RNs, Lab Techs, Rad Techs, CNAs/LVNs, Analysts will be instructed on the requirements of their role, the equipment required to perform their role, the processes, policies and procedures dictating	
Describe the Equipment/Processes to be used in delivering the PL training	Equipment that will be included in Productive Lab Training Nursing: Pyxis, EHR, Charting, Various Hospital Computer Systems Techs: Data Systems, Equipment training Analysts: Various Computer Programs required to meet accreditation, credentials and/or regulatory requirements EVS: Equipment training, Facilities	
Describe Trainer Qualifications	Qualified Trainers will meet one of the following conditions: A. Trainer is a certified instructor of the information being taught in training B. Trainer has a Supervisor role which is responsible for the process being taught in training. C. Trainer meets industry standards for subject matter expertise.	
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	3
PLT Approval	Yes	



**TRAINING PROPOSAL FOR
Eaton Industrial Corporation
17-0779**

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Maria Ibarra
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 77,976.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 77,976.00	N/A	\$ 0.00	\$ 104,000.00

APPLICANT PROFILE

Company Summary	Eaton Industrial Corporation (Eaton Industrial) specifically designs, manufactures, and sells aircraft fuel line systems and components as well as hydro-mechanical and digital equipment for the aviation refueling industry.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 1398	US: 30769	World Wide: 96,257
Turnover Rate (Applicant)	13.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Eaton Industrial plans to provide extensive Lean manufacturing and process, quality and technological improvement skills training to address skill gaps due to a retiring workforce. The training plan will also improve and promote new skills necessary to successfully support a changing manufacturing environment.
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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	76	\$ 18.00	57	\$ 1026	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1911, Eaton Corporation (Eaton) (www.eaton.com) provides energy-efficient solutions to customers to manage electrical, hydraulic, and mechanical power efficiently, safely, and sustainably. Eaton's businesses comprise five distinct segments: Electrical Products, Electrical Systems and Services, Aerospace, Hydraulics, and Vehicle.

Located in Irvine, Eaton Industrial designs, manufactures, and integrates products and technologies for hydraulic systems, fuel and inerting systems, motion control, and engine solutions for the Aerospace segment. These products power hundreds of military and commercial aircraft platforms with a focus on improved reliability, weight reduction, and fuel efficiency. Customers include Boeing, Airbus, Gulfstream, General Electric, Lockheed Martin, and the US Government.

This project will only serve workers at Eaton Industrial location in Irvine.

2. Current Training Project Details

Purpose of Training	<p>The manufacturing environment is changing rapidly, including different technology and various manufacturing techniques. To stay current with industry changes and support customer needs, Eaton Industrial must upgrade employee skills in these topics. The Company has developed a strategic plan to upgrade organizational infrastructure and stay current with the changing manufacturing environment.</p> <p>Additionally, a large portion of Eaton Industrial's workforce is nearing retirement, requiring succession planning over the next five years. The Company will implement a comprehensive training plan to transfer knowledge and skills of retiring employees through cross-training.</p> <p>Training will also enable the Company to achieve a high performance workforce.</p>
Training Infrastructure and Administrative Plan	<p>The Human Resources department will implement and manage administration of the ETP project. In-house trainers will provide training and collect attendance rosters. The corporate team will assist with ETP system tracking and coordinate with ETP staff during monitoring visits. Training vendors will be identified as needed.</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

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training in Business, Computer, Continuous Improvement, and Manufacturing Skills will be provided to approximately 76 workers (Engineer, Operational Coordinator, Customer Service Representative, Manufacturing Staff, Quality Staff, Supply Chain/Planning/Purchasing, and Sales Staff).	

Delivery Method/Level	Productive Laboratory
Summary	
Training of up to 40 hours in Manufacturing Skills will be provided to approximately 50 Manufacturing Staff.	

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 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	Finance for Non-Financial Professionals
	MFGPro Training
	Teambuilding (Insights)
Computer Skills (Standard)	CATIA Software Application Skills
	Microsoft Excel (Intermediate or Advanced)
Continuous Improvement Skills	3P Training
	5S+ Audit Training
	8D Problem Solving
	APICS Training
	Conflict Management
	Contract Procedures
	Defect-Free Launch Training
	Federal Administration Regulations (FAR) Procedures
	Lean Training
	Management of Change Process
	Manager/Frontline Leader Training
	Negotiation Skills
	ProLaunch Training
	Rapid Improvement Event (RIE) Training
	Root Cause Analysis - Fishbone and/or 8D
Subcontract Proposal Support	
Value Stream Map (VSM) Training	
Manufacturing Skills (ME) (Standard)	Quality Training 1002
	Red Tag Training

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	Assembly Training
	Blue Print Reading
	Blueprint reading
	Chem Film
	Cross Training to GF Tester
	FOD Program Training Valve Assembly
	Heli insert
	Lock Wire Training
	Machine Cross-training
	Red Tag Training
	Riveting Swaging and Flaring
	Thermal Expansion

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>PL Justification and Details</i>		
Explain the need for productive laboratory (PL) training	Eaton Industrial requests PL training in Manufacturing Skills for Manufacturing Staff. PL training is the most effective way to teach and learn necessary skills. PL will not exceed 40 hours per-trainee.	
Describe the Equipment/Processes to be used in delivering the PL training	Training will be provided on equipment and processes in production machining, assembly, and testing.	
Describe Trainer Qualifications	Trainers are chosen based on job knowledge, experience, job performance, and teaching ability.	
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	1
PLT Approval	Yes	



Training Proposal for:
Economic Development Collaborative-Ventura County

Agreement Number: ET18-0148

Panel Meeting of: December 8, 2017

ETP Regional Office: North Hollywood

Analyst: E. Wadzinski

PROJECT PROFILE

Contract Attributes:	Retrainee SB <100 Priority Rate SET HUA	Industry Sector(s):	Manufacturing Wholesale Trade Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Ventura, Santa Barbara, Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$95,250		\$6,570 8%		\$101,820

In-Kind Contribution:	50% of Total ETP Funding Required	\$105,500
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TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills	65	8-200	0	\$962	\$16.16
				Weighted Avg: 50			
2	Retrainee SET HUA	Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills	5	8-200	0	\$481	\$16.16
				Weighted Avg: 30			
3	Retrainee SB <100 Priority Rate	Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills	30	8-200	0	\$1,112	\$16.16
				Weighted Avg: 40			
4	Retrainee SB <100	Business Skills, Computer Skills, Continuous Improvement, Mfg. Skills	5	8-200	0	\$705	\$16.16
				Weighted Avg: 30			

Minimum Wage by County: \$16.16 per hour for Ventura and Santa Barbara Counties, and \$16.96 for Los Angeles County.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
JOB NUMBERS 1 - 4		
Manufacturing/Production		40
Sales		10
Administration		10
Machine Operator		10
Assembler		10
Maintenance		10
Engineering		10
Managers/Supervisor		5

INTRODUCTION

Founded in 1996, the Economic Development Collaborative - Ventura County (EDC-VC) (www.edc-vc.com) is a regional public and private economic development partnership located in Camarillo. EDC-VC is a community resource that promotes jobs and economic growth through programs and services that focus on business attraction, retention, and expansion. EDC-VC supports businesses in Camarillo, Fillmore, Moorpark, Ojai, Oxnard, Port Hueneme, Santa Paula, Simi Valley, Thousand Oaks, and Ventura. EDC-VC is eligible for ETP funding as a repeat contracting group of employers, a professional membership association.

EDC-VC provides small and medium-sized business consulting, technical assistance, lending, and training. EDC-VC is the Small Business Administration's designated Small Business Development Center (SBDC) for Ventura and Santa Barbara Counties. EDC-VC is a contract partner for the Ventura County Workforce Investment Board for incumbent worker services, layoff aversion, and coordinating training services. EDC-VC also administers a revolving loan program for the U.S. Department of Commerce, and augments funding with private bank capital, and loan capital provided through First Five Ventura County. In addition, EDC-VC is a contract partner with the City of Ventura for its business incubator and regional entrepreneurship services. EDC-VC also extends their services to a few businesses in Los Angeles County.

EDC-VC provides consulting, training, and lending services to more than 600 firms. Its clients include companies in manufacturing, trade, transportation and warehousing, professional and business services, leisure and hospitality, and other services. EDC-VC has a targeted manufacturing and export trade program. Most of the training is concentrated in manufacturing to help employers become more efficient, enabling them to expand into new markets, particularly international trade.

PROJECT DETAILS

This proposal will serve large and small priority and non-priority businesses with out-of-state competition. A small percentage of the training will be provided to employers lacking out-of-state competition under the Panel's SET program (Job Number 2). The core group of participating employers represents more than the 80% of requested funding. Training is scheduled to begin in December 2017. EDC-VC anticipates that 100% of the training will be held at employer worksites.

Employers working with EDC-VC have identified operational efficiencies to make them more competitive in securing new contracts and entering new markets. As a result, these firms will have the foundation to diversify their customer bases, improve profitability, and grow business.

Training Plan

Business Skills - Training will be offered to all occupations to improve all levels of communication and customer service. Sales trainees will also learn sales and business strategies that stimulate growth.

Computer Skills - Training will be offered to Administration Staff, Sales Staff, and Managers/Supervisors. Trainees will learn database management skills and how to be more proficient in the use of various business productivity applications.

Continuous Improvement - Training will be offered to all occupations to help workers reach production goals, increase productivity and efficiency, improve product quality, reduce waste, and develop teamwork strategies to enhance performance and business processes. Trainees will

learn to identify and resolve production problems, as well as implement effective process improvements.

Manufacturing Skills - Training will be offered to Assemblers, Machine Operators, Maintenance Staff, and Manufacturing/Production Staff. Trainees will learn current machine and equipment operation, maintenance, and troubleshooting skills.

Marketing and Support Costs

EDC-VC markets and advertises its programs primarily through the outreach and services of its SBDC. As a regional economic development corporation, EDC-VC convenes a monthly meeting of the economic development leads at each of Ventura County's ten cities to share information on program resources. It also shares program opportunities through regular Board of Directors communications, which involves 32 public and private sector leaders throughout the County.

For over six years EDC-VC, in conjunction with local Workforce Investment Boards and Job & Career Centers, has operated a manufacturing outreach program. This program has resulted in the regional development of a manufacturer's executive roundtable and regular outreach to over 900 manufacturing firms in the region.

EDC-VC also publishes a monthly e-newsletter, runs ads in the local newspapers and Chamber of Commerce publications, and participates in the monthly regional Chamber Executive meeting, including Chamber of Commerce leads from ten separate regional and local Chambers.

EDC-VC is requesting 8% support costs for ongoing employer marketing and outreach. These costs will involve contacting, interviewing, assessing, and developing individual training plans throughout the program. In addition to interfacing directly with employers, the CEO will be speaking at events and doing direct outreach to regional economic development partners and firms. The Program Manager will coordinate with small business consultants contracted to deliver SBDC services. Additional cost will include ad placements, mailings, and customizing outreach material. Staff recommends the 8% support costs.

SET High Unemployment Area

Under Special Employment Training (SET), participating employers are not required to demonstrate out-of-state competition. Trainees must be earning at least the statewide average hourly wage at the end of the retention period.

The SET trainees (Job Number 2) work in High Unemployment Areas (HUA) with unemployment exceeding the state average by 25%. Some company locations in Ventura, Santa Barbara and Los Angeles counties may be in a HUA, and trainees, therefore, qualify for the ETP Minimum Wage (\$16.16 per hour, in Ventura and Santa Barbara Counties, and \$16.96 in Los Angeles County) rather than the Statewide Average Hourly Wage. EDC-VC is requesting the \$16.16 per hour wage (Ventura and Santa Barbara Counties) and \$16.96 per hour (Los Angeles County) for the SET HUA trainees (Job Number 2).

The only Managers and Supervisors eligible to receive training in Job Number 2 (SET/HUA) are Frontline Managers and Supervisors (Job Number 2).

Commitment to Training

ETP funds will not displace the existing financial commitment to training of participating employers. Safety training is, and will continue to be, provided by the participating employers in

accordance with all pertinent requirements under state and federal law.

➤ **Training Infrastructure**

Project administration will be done by EDC-VC staff. The President will provide general oversight; the SBDC Director will oversee employer outreach and assessment and development of individual training plans; a Program Assistant will work with the training vendors to assure accurate tracking of all training hours and recordkeeping; and the Office Manager will provide administrative services for invoicing, oversight, and quality assurance on data tracking.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0149	Camarillo	11/17/15 – 11/16/17	\$99,916	\$99,520 (99.6%)
*ET13-0162	Camarillo	10/08/12 – 10/07/14	\$258,961	\$144,662 (56%)

*ET13-0162 – Poor performance was due to key participating employers postponing multiple training sessions due to increases in business demand.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

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

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Communication Skills
- Customer Service
- Sales Skills
- Report Writing

COMPUTER SKILLS

- Database Management
- Enterprise Resource Planning
- Microsoft Office (Intermediate or Advanced)

CONTINUOUS IMPROVEMENT

- Building Successful Teams
- Interpreting and Analyzing Data
- ISO Training
- Leadership Skills for Frontline Workers
- Lean Manufacturing
- Kaizen Methodology
- Performance Management
- Problem Solving
- Process Improvement
- Root Cause Analysis
- Six Sigma
- Statistical Process Control
- Total Quality Management

MANUFACTURING SKILLS

- Production Equipment Operation
- Manufacturing and Assembly
- Equipment Troubleshooting
- Shop Measurements
- Industrial Maintenance
- Machine Set-Up

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: Economic Development Collaborative-Ventura CCG No.: ET17-0148
County

Reference No: 17-0272

Page 1 of 1

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: AeroVironment, Inc.

Address: 900 Enchanted Way

City, State, Zip: Simi Valley, CA 93021

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 50

Total # of full-time company employees worldwide: 665

Total # of full-time company employees in California: 618

Company: Deckers Outdoor Corporation

Address: 3175 Mission Oaks Blvd

City, State, Zip: Camarillo, CA 93012

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 50

Total # of full-time company employees worldwide: 2500

Total # of full-time company employees in California: 850

Company: Federal Defense Industries

Address: 5231 Maureen Lane

City, State, Zip: Moorpark, CA 93021

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 19

Total # of full-time company employees worldwide: 25

Total # of full-time company employees in California: 25



**TRAINING PROPOSAL FOR
EVERETT GRAPHICS INC
18-0641**

Panel Meeting Date: 12/08/2017
Regional Office: San Francisco Bay Area Regional Office
Analyst Name: Samantha Wang
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 148,716.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 148,716.00	N/A	\$ 0.00	\$ 297,896.00

APPLICANT PROFILE

Company Summary	Everett Graphics, Inc. (Everett Graphics) (www.everettgraphics.com), is a paperboard manufacturing company that designs and manufactures environmentally friendly packaging for numerous industries.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 105	US: 105	World Wide: 105
Turnover Rate (Applicant)	15.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	No		

TRAINING PROFILE

Training Objective(s)	Training will enable Everett Graphics to expand into large format printing. Staff will be trained on two newly purchased machines: Koenig & Bauer (KBA) Rapida 145 57-inch press and Bobst Mastercut 145 PER-Autoplatten Die-Cutter.
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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	82	\$ 18.00	91	\$ 1638	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee, Temp to Permanent	6	\$ 20.00	120	\$ 2400	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1980 and headquartered in Oakland, Everett Graphics, Inc. (Everett Graphics), seeks funding for retraining and Job Creation. The Company designs and manufactures eco-friendly packaging solutions for numerous industries.

The Company's packaging has innovated the food related business markets. For example, instead of using Styrofoam trays that mushrooms are typically packaged in, Everett Graphics uses recyclable and biodegradable materials while creating a moisture resistant barrier to keep the mushrooms fresh.

Customer Base

Everett Graphics partners with start-up businesses and Fortune 500 companies in the food and beverage, health and beauty, pharmaceutical, medical, technology, and other industries. Some of the companies include: Williams-Sonoma, Monterey Mushrooms, and Advanced Micro Devices. Approximately 73% of the Company's revenue comes from the food related business industry, 12% from the health and beauty industry, and 8% from pharmaceutical and medical industry.

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

Everett Graphics is modeling its packaging solutions to meet new state requirements on plastic/Styrofoam usage. The Company has created recyclable and compostable packaging alternatives as they expand their reach into the food related business markets (i.e. - produce, poultry, seafood, meats).

The company's business strategy is geared towards pro-environmental printing and packaging. Everett Graphics seeks ETP funds to help expand its capabilities, specifically in large format printing. Staff will receive training on the following new equipment:

- Koeing & Bauer (KBA) Rapida 145 - An enhanced performing and automated format print press that uses 100 percent recyclable green solutions that reduces production time, increases efficiency, and lowers cost.
- Bobst Mastercut 145 PER-Autoplaten Die Cutter with state-of-the-art register system, feeder, automatic pallet transfer, and data management system that integrates all die-cutting materials at high speed.

Training on the equipment will take approximately 120 – 140 hours

PROPOSED TRAINING PROJECT DETAILS

	<p>for the initial implementation phase and learning its basic functions. While the company projects overall training will be approximately 40 hours per week for six weeks (240 hours.) ETP will fund an average of 91 hours for retrainees and 120 hours for Job Creation. Training includes: Ergo Tronic Color Control, Logo Tronic, software training for Maintenance and Operation staff, and implementation of services. There are additional levels (Feeder Operator, 2nd Pressman, and 1st Press Operator) in which Machine Operators I and II need to become experts. Each level can take as many as 500 hours.</p> <p>Additionally, all occupations will receive Business, Continuous Improvement, Computer, and Manufacturing Skills training to streamline the production process.</p>
Training Infrastructure and Administrative Plan	Class/ Lab and Productive Lab (PL) training will be delivered at Everett Graphic's Oakland facility by qualified internal staff and a Koenig & Bauer (KBA) trainer knowledgeable in the new equipment procedures. An internal training team consisting of a HR Administrator, department heads, and managers will oversee all training. The Company has retained Corporate Tax Incentives to assist with administrative duties. Everet Graphics has a detailed training scheudle in place to ensure training will commence upon approval and continue through production.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training topics include Project Management, Bobst Operation Software, Six Sigma, Capacity Requirement Planning (CRP)-Adco Production, and CRP-Bosch Production. This training will ensure staff is knowledgeable of each product. The CRP training is an enterprise application used by organizations when developing a product plan to estimate product capacity.	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Productive Laboratory
Summary	
Productive Lab topics include Equipment Operation delivered to Machine Operators which will be conducted on the production floor. This will ensure staff have the proper knowledge when working on the new machines.	

4. Additional Company or Training Project Details

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

Productive Laboratory

Productive Laboratory (PL) training will be provided to Machine Operators and Managers. Trainees will be trained on the new machines used in the manufacturing processes. Training will increase staff's machine operation skills and improve their productivity while enabling them to problem solve. PL training will be delivered by internal subject matter experts with more than five years of experience. The above occupations will receive 8 – 40 hours of training.

Everett Graphics is requesting the PL training to be conducted on a 1:2 trainer-to-trainee ratio as some processes on the new machinery cannot be duplicated in a classroom environment and require more than two people to operate.

Retainee- Job Creation/Temp to Permanent

The Panel offers incentives to companies that commit to hiring new and temporary to permanent employees. Training for newly-hired employees will be subject to a lower post-retention wage, and a higher fixed fee reimbursement rate.

Everett Graphics plans to hire six new Machine Operators working in a temporary capacity with intent to hire after 90 days.

Everett Graphics has committed to hiring six new employees (Job 2). The date-of-hire for the 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. Upon hire into full-time permanent employment, trainees will receive health benefits after 1 day.

4.1 Program Waivers

No waivers have been applied to this proposed project.

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Corporate Tax Incentives LLC	Rancho Cordova	\$ 16,015.44
Administrative	Corporate Tax Incentives LLC	Rancho Cordova	13% of earned Amount
Training	None selected to date	N/A	N/A

4.3 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Change Management
	Communication and Conflict Management
	Customer Service Excellence
	Decision Making
	Inventory Control
	Inventory Management
	Leadership Principles
	Project Management
	Purchasing/Procurement
	Supply Chain
	Technical Sales Training-Finishing
	Technical Sales Training-Packaging Formats
	Technical Sales Training-Printing
Computer Skills (Standard)	ArtPro
	Bobst Operation Software
	CAD Design
	Customer Relationship Management
	ERP Software
	Fuji plate marking Software
	KBA Operations Software
	Roland Software
Continuous Improvement Skills	Frontline Leadership
	Kaizen Process
	Lean Manufacturing
	Line Design
	Management Standard Work
	Problem Solving
	Root Cause Analysis
	Sanitation
	Six Sigma
	Task Management
	Train the Trainer
Visual Control	
Manufacturing Skills (ME) (Standard)	3D Comps
	Auto-Count Press
	Baler Operation
	Blanket Wash
	Blanking Tool Issues
	Breakdown/ Repairs -Electrical
	Breakdown/ Repairs -Mechanical
	Case Sealing

Attachment 2 - Training Delivery and Curriculum Listing

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

Coating Blanket
CRP-Adco Production
CRP-Bosch Production
Die Production
Elect Proofing
Electrical Imposition
Electrical Plates
Feeder
Folding Gluing Operation
Handwork
Labels
Layout Production
Mac Work
Machine Shop - Tooling Build
Pre Press Operation
Preventative Maintenance
Printing Press Operation
Sheeting Operation
Tool Production

Delivery Method /Level	Productive Laboratory	
Training Type (Level)	Planned Course Offerings	
Manufacturing Skills (ME) (Standard)	Equipment Operation	
PL Justification and Details		
Explain the need for productive laboratory (PL) training	Some Manufacturing Skills training will consist of classroom/lab and Productive Lab delivery to increase machine operating skills and improve productivity. PL will be provided to front-line managers, supervisors, leads and operators on recently purchased equipment. Training will include troubleshooting and maintenance to improve machine longevity.	
Describe the Equipment/Processes to be used in delivering the PL training	Training materials and coursework will be developed by internal operations and in-house quality staff together with employees of the OEM. Coursework will be customized for each piece of equipment and the applicable manufacturing and maintenance processes. List of Equipment used: Full computer to-plate capability Creo Platesetter Creo (Spectrum) Trendsetter Proofer Epson 9000 and 9600 with best rip Artpro Workstations Misomex Plotter System Misomex Step-and Repeat System Computer-to-Plate	
Describe Trainer Qualifications	Everett will use subject matter experts with 5+ years of experience from the OEM for PL training on the new machinery. Since the trainee population will include front line supervisors, this is a form of "train the trainers" for Everett. The instructor will be dedicated to training delivery during all hours of PL 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	2
Ratio for Maximum Ratio When More than One Class	1	2
PLT Approval	Yes	



TRAINING PROPOSAL FOR
Interior Experts General Builders, Inc.
17-0629

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Jela Romero
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 80,712.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 80,712.00	N/A	\$ 0.00	\$ 124,522.00

APPLICANT PROFILE

Company Summary	Headquartered in Chino Hills, Interior Experts General Builders, Inc., (www.interiorexperts.com) (Interior Experts) is a licensed subcontractor providing commercial construction for tenants, developers and building owners throughout Southern California. Interior Experts specializes in retail build outs, open store remodels and office tenant improvements. Some of Interior Experts' completed projects include LA Fitness, Superior Grocers, Rite Aid, Costco, WinCo Foods, Starbucks, Target stores and Compton Unified School District buildings.
Industry Sector(s)	Construction
Priority Industry	Yes

No. Employees (Applicant)	State: 130	US: 130	World Wide: 130
Turnover Rate (Applicant)	0.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	<p>After expanding the services it provides as a general contractor in recent years, Interior Experts has grown an average of 14% each year. In addition, the construction industry has become more reliant on computerized technology and green building. Interior Experts has to respond to these various changes to become more competitive and satisfy a more sophisticated client base.</p> <p>Interior Experts employees include experienced Project Leads with LEED AP's (Leadership in Energy and Environmental Design) training, Field Installers, site Supervisors and Managers and Administrative staff. The Company is dedicated to providing reliable service and delivering superior build-outs. As such, Interior Experts needs to retrain existing employees and prepare newly hired employees to handle various tasks with proficiency. Employees need to be trained in areas of Business Skills, Commercial Skills, Computer Skills, Continuous Improvement and Hazardous Materials.</p>
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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	118	\$ 18.00	38	\$ 684	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1992, Interior Experts is headquartered in Chino. The Company offers a single point contact for all design, permit and subcontracting needs, assuring quality and reliable service from inception to completion of a project.

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>Interior Experts needs to upgrade its employee skills to respond to the challenges and changes in the construction industry. Interior Experts needs to improve in areas of customer service, field installation job skills, trade related skills, job cost management, new computer programs, estimating software, customer service, administrative procedures, and company culture.</p> <p>Customers are aligning with high technology construction firms such as Interior Experts that can provide superior well-trained staff proficient in the latest technology, using the latest construction software and techniques in energy utilization and efficiency.</p>
Training Infrastructure and Administrative Plan	<p>Interior Experts is ready to start training upon approval of this proposal. The Owner and an employee from its Human Resources will serve as project administrators and will work together with department heads in scheduling and coordinating training. Interior Experts has retained the services of Training Funding Source to assist with enrollment, data collection and data entry into the ETP systems. Training will be delivered by a combination of in-house staff and vendors.</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

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>Business Skills – This training will be provided to Administrative Staff, Project Leads, Field Installers and Manager/Supervisors. Training will enable the Company to improve customer service for internal and external customers. Skills in performance management, communication skills, planning and leadership will improve managers and supervisor skills to better meet the needs of employees. Professional and clerical employees will benefit from training in the specific areas of accounting, planning and sales strategies.</p> <p>Commercial Skills – This training will be provided to Field Installers and Project Leads to educate them on how to read plans, job costing, estimating materials needed to complete a job, man hours, client relations, and company policy and procedure to ensure a seamless and profitable project upon completion.</p> <p>Computer Skills – This training will be provided to all occupations. Training in PlanSwift, DropBox, Soda PDF and Microsoft Project will enhance employees’ knowledge and skills in the use and navigation of the Company’s computer system which will facilitate smoother work processes. Employees will receive training involving project estimation, job costing and plan reading using the Company’s newly installed PlanSwift software.</p> <p>Continuous Improvement – This training will be provided to all occupations to enhance the overall knowledge and skill in process improvement and quality control. Skills from this training will cut lead time and will achieve the target completion goals for project.</p> <p>Hazardous Materials – This training will be provided to Managers and Supervisors and Project Leads that will provide them skills to properly handle, move, store, use and dispose of toxic and hazardous building materials.</p>	

Delivery Method/Level	Productive Laboratory
Summary	
<p>PRODUCTIVE LABORATORY (PL) – Trainees may produce goods for profit as part of the training, in the courses identified under the Curriculum. The trainer-to-trainee ratio will not exceed 1:1. The maximum hours per-trainee may be capped, as shown in the Curriculum. For this proposal, Interior Experts will provide up to 24 hours of productive laboratory training on various equipment used during construction.</p>	

PROPOSED TRAINING PROJECT DETAILS

4. Additional Company or Training Project Details

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

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	\$ 3,900.00
Administrative	Training Funding Source	Seal Beach	13%
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A.

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Accounting
	Architect documents
	Bus Development/Sales
	Change Management
	Coaching/Communication Skills
	Conflict Management
	Contracts
	Customer Satisfaction
	Leadership
	Performance Management
	Planning
	Product Knowledge
	Risk Management
Commercial Skills (Standard)	Change Orders
	Construction Procedures
	Equipment/Tool Operations
	Field Operational Procedures
	Heat & Illness Prevention
	Installation procedures
	Job cost
	Materials Handling and Storage
	Ramset
	Scaffold procedures
	Signs, Signals and Barricades
	Site Logistics
	Walk Through procedures
	Worksite Procedures
	Zero punch list
	OSHA 10 & 30
Computer Skills (Standard)	BidMail
	Dropbox
	Microsoft Office/Project
	Planswift (on screen take off)
	Quickbooks
	Soda PDF
	Time tracking
	Website
Continuous Improvement Skills	Process /Productivity improvement
	Quality Systems and Procedures
	Team Building/ Problem Solving/ Decision-making

Attachment 2 - Training Delivery and Curriculum Listing

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

Hazardous Materials Skills	Material Safety Data Sheet (MSDS)
	Toxic and Hazardous Substances

Delivery Method /Level	Productive Laboratory
Training Type (Level)	Planned Course Offerings
Commercial Skills	Equipment Operations/ Inspection
	Field Operational/Installation procedures
	Job cost
	Scaffold
	Signs, Signals and Barricades
	Site Logistics
	Walk Through procedures
	Work zone traffic control
	Zero punch list

PL Justification and Details	
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Explain the need for productive laboratory (PL) training	Some types of Construction skills training is best learned by trainee hands on at job site. Job site cannot be practically replicated in a class/lab environment. Productive Lab (PL) training will allow experience in a working environment. This will supplement classroom training. Occupations will include field installers. Trainees require up to 24 hours to learn to operate multiple equipment. Equipment includes power and non-power tools.
Describe the Equipment/Processes to be used in delivering the PL training	Trainees will be trained on construction equipment required to complete jobs Trainees will be assigned tasks, based on job requirements once the training is completed. Field Installers will operate heavy equipment, use construction power tools, and learn computer software.
Describe Trainer Qualifications	Trainers will be by subject-matter experts with demonstrated knowledge and expertise, dedicated to training delivery during all hours of training. PL will not exceed 1:1 trainer-to-trainee ratio. Trainers will assign projects with step-by-step instructions to trainees. Trainers will train, observe, direct and provide immediate feedback to the trainee as work is performed.

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	2	2
PLT Approval	Yes	



**Retrainee - Job Creation
Training Proposal for:
KRC Safety Co., Inc.**

Small Business

ET18-0143

Approval Date: December 8, 2017

ETP Regional Office: Sacramento

Analyst: J. Lazarewicz

CONTRACTOR

- Type of Industry: Manufacturing
Services
Priority Industry: Yes No
- Number of Full-Time Employees
California: 97
Worldwide: 97
Number to be trained: 93
Owner Yes No
- Out-of-State Competition: NAICS Code Eligible/No OSC
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 10%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$73,280
- In-Kind Contribution: \$75,000

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 HUA SET SB <100	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp.	80	8-60	0	\$770	*\$12.12
				Weighted Avg: 35			
2	Retrainee Priority Rate SB <100 HUA	Business Skills, Comm'l. Skills, Computer Skills, Cont. Imp., Mfg. Skills	8	8-60	0	\$910	*\$12.12
				Weighted Avg: 35			
3	Job Creation Initiative HUA SET SB <100	Business Skills, Commercial Skills, Computer Skills, Continuous Improvement	5	8-60	0	\$880	*\$10.50
				Weighted Avg: 40			

*It will be made a condition of contract that the trainees in Job Numbers 1-3 will never be paid less than the statewide or local minimum wage rate in effect at the end of retention regardless of the wage expressed in this table.

- Reimbursement Rate: Job #'s 1 and 3: \$22 SB Non-Priority
Job # 2: \$26 SB Priority
- County(ies): Tulare
- Occupations to be Trained: Administrative Staff, Field Crew, Graphics Staff, Mechanic, Transportation Staff, Manager, Supervisor, Owner
- Union Representation: Yes Laborers' International Union of North America Local 294
 No
- Health Benefits: N/A

SUBCONTRACTORS

- Development Services: Strategic Business Solutions, LLC of Visalia assisted with development for a flat fee of \$5,000.
- 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 1978 and headquartered in Visalia, KRC Safety Co., Inc. (KRC) (www.krcsafety.com) provides traffic control plans and equipment such as concrete barriers, lighted barricades, and electronic signboards for road construction sites throughout California. KRC's primary customers include commercial contractors and municipalities including California Department of Transportation. KRC has two facilities located in Los Angeles and Tulare (Visalia) counties. Only the Tulare county location will participate in training.

The Company operates two divisions, both which are participating in training:

- KRC Safety provides traffic control plan services, including sales/rental of traffic control equipment.
- KRC Graphics manufactures traffic, street and construction signage, providing design, print and manufacturing operations for vehicle sing wrap, vinyl wraps, vinyl decals, window graphics, signs, banners, posters and business cards.

KRC Graphics has eight trainees at the Visalia facility who perform manufacturing functions. These manufacturing functions meet Out-of-State Competition and qualify for priority industry status (Job Number 2). The Company's other operations under the KRC Safety division are eligible for funding under Special Employment Training (Job Numbers 1 and 3).

Need for Training

This is KRC's second ETP Agreement and the second in the last five years. In this proposal, KRC will continue to build on its previous training of improving efficiency and overall productivity. The Company will also provide training on additional new equipment and software. There will be no duplication of training for trainees who participated in the prior contract.

KRC is expanding its graphics division to include silk screening and embroidery operations. Due to this expansion, the Company recently invested in new production equipment. This new equipment includes an Omni 330tx Silk Printer and Tajima Commercial Embroidery Machine. KRC must train workers in technological and process improvement skills to be efficient and productive.

Additionally, KRC implemented the use of new Apple iPads which allows staff the ability to enter orders, generate invoices, order materials, change orders, view real time schematics, and access additional information from remote locations. Supervisors, Field Crew, and Graphics Staff will receive training on the new tablets. Training will give employees the tools necessary to navigate the system and improve business operations.

Retrainee - Job Creation

With the Road Repair and Accountability Act of 2017 work has begun on repairing and rebuilding California's roads, freeways, bridges, and transit systems requiring traffic control provisions. Due to an increase in demand for traffic control equipment, crews, and signage, the Company is expanding business capacity by adding newly-hired employees to assist with operations.

KRC is committed to hiring five new Field Crew (Job Number 3). The date-of-hire for all trainees in the Job Creation program will be within the three-month period before contract approval or

within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

KRC will provide Class/Lab training delivered by in-house experts and vendors as needed in the following:

Business Skills: Training will be offered to all occupations. Administrative Staff, Managers and Supervisors will also receive project management training. Training topics include Total Account Strategies, Project Communications and Time Management.

Commercial Skills: Training will be offered to all occupations. Training topics include Hoist/Crane Training, Traffic Flow Panning and Set-Up, and Safe Loading, Unloading and Transport of Materials.

Computer Skills: Training will be offered to all occupations. Training topics include Advanced Quickbooks, Advanced CAD/CAD 3-D Software, Rapid Plan Software, and Apple iPads.

Continuous Improvement: Training on LEAN processes will be offered to all occupations and focus on concepts, principles, waste identification and reduction, process mapping and kaizen. Training topics include LEAN Phase II, Teambuilding, and Leadership.

Manufacturing Skills: Training will be offered to Graphics Staff in Materials Handling Equipment, Sign and Vehicle Wrap Production, Omni 330tx Silk Printer and Tajima Commercial Embroidery Machine.

Training Infrastructure

KRC has designated a Manager and an additional staff member to plan and oversee all aspects of training. These are the same individuals who oversaw administration of the prior Agreement. The Company already has a process in place to ensure all administrative duties are handled properly and all unit supervisors are informed of their responsibilities. In addition, KRC has retained the services of a third-party administrative subcontractor to assist with administrative requirements.

Union Support

The Field Crew employees are represented by a local union: Laborers’ International Union of North America Local 294. A letter of support is pending. KRC will not begin training until a union letter of support is submitted for their respective members.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by KRC under a prior ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees Enrolled	No. Completed Training	No. Retained
ET16-0305	\$54,510	11/16/15 – 11/15/17	110	101	0

Based on ETP Systems, 2,374 reimbursable hours have been tracked for potential earnings of \$52,629 (97% of contract amount).

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

8 - 60 Trainees may receive any of the following:

BUSINESS SKILLS

- Account Development
 - Advanced Customer Service Skills
 - Conflict Resolution
 - Handling Special Orders
 - Product Knowledge
 - Purchasing Best Practices
 - Total Account Strategies
- Project Management II
 - Equipment Procurement
 - Materials Staging
 - Project Communications
 - Purchasing
 - Scheduling
 - Time Management
 - Worksite Safety

COMMERCIAL SKILLS

- Hoist/Crane Training
- Safe Loading, Unloading and Transport of Materials
- Traffic Flow Planning and Set-Up

COMPUTER SKILLS

- Apple iPad Tablet Training
- CAD/CAD 3-D (advanced)
- Quickbooks/Intuit (advanced)
- Rapid Plan Software

CONTINUOUS IMPROVEMENT

- LEAN Processes (Phase II)
- Leadership
- Teambuilding

MANUFACTURING SKILLS

- Computer Assisted Machinery Programming/Operations
- Material Handling Equipment
- Omni 330tx Silk Printer
- Sign/Wrap Production and Installation
- Tajima Commercial Embroidery Machine

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

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



**Training Proposal for:
LAX Coastal Area Chamber of Commerce**

Agreement Number: ET18-0149

Panel Meeting of: December 8, 2017

ETP Regional Office: North Hollywood

Analyst: M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee SB <100 Priority Rate SET	Industry Sector(s):	Manufacturing Engineering Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, 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)	≤20%		

FUNDING DETAIL:

Program Costs	+	Support Costs	=	Total ETP Funding
\$231,925		\$16,068 8%		\$247,993

In-Kind Contribution:	50% of Total ETP Funding Required	\$513,525
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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 Imp., Mgmt. Skills	25	8-200	0	\$2,406	\$16.72
				Weighted Avg: 125			
2	Retrainee	Business Skills, Continuous Imp., Mgmt. Skills	75	8-200	0	\$1,203	\$16.72
				Weighted Avg: 75			
3	Retrainee SB <100 Priority Rate	Business Skills, Continuous Imp., Mgmt. Skills	55	8-200	0	\$1,390	\$16.72
				Weighted Avg: 50			
4	Retrainee SB <100	Business Skills, Continuous Imp., Mgmt. Skills	10	8-200	0	\$1,176	\$16.72
				Weighted Avg: 50			
5	Retrainee SET SB <100	Business Skills, Continuous Imp., Mgmt. Skills	8	8-200	0	\$1,176	\$29.38
				Weighted Avg: 50			

Minimum Wage by County: Job Numbers 1 – 4: \$17.22 per hour for Orange County; \$16.96 per hour for Los Angeles County; and \$16.72 per hour for San Diego County.

Job Number 5: \$29.38 per hour 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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Numbers 1 - 5		
Administrative Staff		20
Engineer		15
Production/Service Staff		118
Manager/Supervisor 1		10
Manager/Supervisor 2		10

INTRODUCTION

The LAX Coastal Area Chamber of Commerce (Chamber) (www.laxcoastal.com) was founded in 1953 to promote business and enhance the vitality of the community through member services, educational programs, strategic partnerships, community outreach, and legislative advocacy. The Chamber has more than 550 members, representing over 15,000 employees. Chamber members range in size from individuals and sole proprietors to multi-national corporations. Members represent industries such as Construction and Engineering, Education, Entertainment, Hospitality, Manufacturing, Medical Services, and Professional Services.

The Chamber is eligible for ETP funding as a group of employers. This proposal targets small to medium-sized companies. The core group of participating employers represents at least 80% of the requested funding.

PROJECT DETAILS

The Chamber conducted assessments with each of the participating employers to identify specific training needs and industry-related demands. Employers indicated they would like to improve workplace communication, sales and presentation skills, customer service, and leadership skills. As a result, the Chamber crafted a comprehensive training program that can be customized to meet the unique needs of each employer.

The Chamber anticipates that approximately 50% of the proposed training will be delivered at employer worksites and the other 50% will be held at the Chamber's facility in Los Angeles. The Chamber plans to use professional training vendors to deliver customized instruction.

Training Plan

Business Skills (25%): Training will be offered to Administrative Staff, Production/Service Staff, and Managers/Supervisors. Training will improve interactions with internal and external customers, while enhancing overall business performance.

Continuous Improvement (50%): Training will be offered to all occupations. Training will focus on communication, customer service, and teambuilding. These modules will provide workers with the skills needed to implement new business processes and enhance productivity within their respective organizations.

Management Skills (25%): Training will be provided to Managers/Supervisors. Trainees will gain the skills and knowledge to become more effective leaders in the workplace.

Marketing and Support Costs

The Chamber's marketing efforts consist of email campaigns, word-of-mouth advertising, social networking, and board member outreach. The Chamber works directly with business community leaders to devise networking opportunities, marketing strategies, and educational training.

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

Tuition Reimbursement

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

Commitment to Training

ETP funds will not displace the existing financial commitment to training by participating employers. ETP funds will provide training for businesses with very limited training resources and allow structured training to occur that would not be possible otherwise due to budget constraints. Participating employers do provide safety training in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

The Chamber has identified two staff members to oversee the implementation of this project. These individuals will coordinate marketing, recruiting, scheduling, and tracking of training to ensure that project administration adheres to ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

To Be Determined

Exhibit B: Menu Curriculum

Class/Lab Hours

8 – 200

Trainees may receive any of the following:

BUSINESS SKILLS

- Sales
- Public Speaking/Presentation Skills
- Goal Setting
- Change Management

CONTINUOUS IMPROVEMENT

- Communication
- Business Etiquette
- Customer Service
- Teambuilding
- Problem Solving
- Time Management

MANAGEMENT SKILLS (Managers/Supervisors only)

- Conflict Resolution
- Mentoring/Coaching
- Teambuilding for Managers
- Leadership and Influence

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: LAX Coastal Area Chamber of Commerce

CCG No.: ET18-0149

Reference No: 17-0248

Page 1 of 2

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Invivoscribe Technologies Inc.

Address: 6330 Nancy Ridge Dr., Suite 106

City, State, Zip: San Diego, CA 92121

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 25

Total # of full-time company employees worldwide: 132

Total # of full-time company employees in California: 110

Company: Jenkins/Gales & Martinez, Inc.

Address: 6033 W. Century Blvd. #601

City, State, Zip: Los Angeles, CA 90045

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 45

Total # of full-time company employees worldwide: 45

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

Company: MYWI Fabricators, Inc.

Address: 2115 E. Edwards St.

City, State, Zip: South El Monte, CA 91733

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 22

Total # of full-time company employees in California: 22

Company: Pacifica Hotels

Address: 17300 Redhill Ave, Suite 250

City, State, Zip: Irvine, CA 92614

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 75

Total # of full-time company employees worldwide: 650

Total # of full-time company employees in California: 500

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: LAX Coastal Area Chamber of Commerce
Reference No: 17-0248

CCG No.: ET18-0149
Page 2 of 2

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Productive Learning, LLC

Address: 34700 Pacific Coast Highway, #202

City, State, Zip: Capistrano Beach, CA 92624

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 8

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



**TRAINING PROPOSAL FOR
Mesa Energy Systems, Inc.
18-0547**

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Maria Ibarra
Type of Proposal: Single Employer
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 202,320.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 202,320.00	N/A	\$ 0.00	\$ 470,000.00

APPLICANT PROFILE

Company Summary	Mesa Energy Systems, Inc. dba EMCOR Services Mesa Energy Systems (EMCOR) (www.mesaenergy.com) is a licensed commercial Heating, Ventilating, and Air Conditioning (HVAC) company that offers HVAC maintenance and service; building automation systems (BAS) services; commercial refrigeration repair; and chiller services.
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Industry Sector(s)	Construction
Priority Industry	Yes
No. Employees (Applicant)	State: 575 US: 600 World Wide: 600
Turnover Rate (Applicant)	12.00 %

Repeat Contractor	No
High Unemployment Area	Yes
Union(s)	Plumbers & Pipe Fitters / DC 16

TRAINING PROFILE

Training Objective(s)	Training is designed to strengthen and deepen employees' knowledge and abilities in a wide range of skills for high-level production.
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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	562	\$ 18.00	20	\$ 360	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Established in 1983 and headquartered in Irvine, EMCOR provides mechanical and electrical construction; industrial and energy infrastructure; and building services to a wide range of customers statewide. The Company also provides energy management, energy audit services, customized HVAC design/build, and retrofit solutions to commercial and industrial companies including Queen Mary, Photographic Art Museum of San Diego, University of La Verne, Mission Inn, Intel, AT&T, and Cal Tech.

EMCOR's seven California facilities located in the cities of Irvine, Bakersfield, Fresno, Sacramento, El Cajon, San Leandro, and Thousand Oaks will participate in the proposed training plan.

2. Current Training Project Details

Purpose of Training	<p>EMCOR's business initially focused on installing and servicing HVAC equipment. Today, the recent demands of the marketplace have transformed EMCOR into an energy solutions company that provides customers with services to improve building and mechanical maintenance as well as optimal energy performance.</p> <p>To successfully support this transition, the Company has committed to implement process improvement initiatives specifically focusing on improving employees' knowledge, skills, and abilities. Employees must learn to design and manage energy service and efficiency activities and projects. They must also be trained on equipment and software systems. Training will allow the Company to keep pace with changing industry standards, equipment, applications, and standard operating procedures and increase productivity and efficiency while offering quality products and services.</p>
Training Infrastructure and Administrative Plan	EMCOR has designated its Energy Incentive Consultant to maintain original attendance rosters as well as implement and manage the overall administration of the ETP program. Each facility Human Resources Representative will collect and submit original attendance rosters to its Irvine headquarters location. The Company also retained a subcontractor to assist with administration.
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

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training in Business, Computer, Continuous Improvement, and Commercial Skills will be provided to approximately all occupations.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
Training in Commercial Skills will be provided to approximately 354 frontline workers (Installation Maintenance and Repair Staff Only).	

4. Additional Company or Training Project Details

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

4.1 Program Waivers

Provided here are the waivers and their descriptions that apply to this Panel Proposal.

Waivers	Description
SET Priority Industry Wage Modification and HUA Wage Modification	<p>Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period.</p> <p>For trainees employed in a priority industry, the Panel may modify the SET wage up to 25% below the statewide average hourly wage from \$29.38 to \$22.04. EMCOR requests this wage modification to train entry-level frontline workers in lower wage occupations to provide opportunities for wage increases and long-term job security.</p> <p>Additionally, some facilities are located in High Unemployment Areas, regions with unemployment exceeding the State average by 25%. These employees may receive a modification of up to 25% below the Standard Wage.</p>

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Steve Duscha	Sacramento	\$ 10,000.00
Administrative	Steve Duscha	Sacramento	Not to exceed 13% of payment earned
Training	To Be Determined		

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Accounting
	Budgets
	Business Administration
	Business Writing And Grammar
	Energy efficiency
	Financial Analysis
	Marketing & Product Knowledge
	Negotiating
	Project Management
	Relationship Building
	Sales Strategies & Skills
Commercial Skills (Standard)	Balancing HVAC systems
	Blueprint Reading
	Equipment Operations
	Meeting Title 24 requirements
	Operations & Processes
	Preventive maintenance
Computer Skills (Standard)	Building information systems
	Computer Application Software
	Enterprise Management Systems
Continuous Improvement Skills	Adapting to Change
	Coaching & Feedback
	Communicating Effectively
	Creating & Building Teamwork
	Leading Others
	Role of the Lead
	Root Cause Analysis
	Team Problem Solving
	Time Management & Delegation
<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Commercial Skills (Safety)	Accident Investigation and Root Cause Analysis (for Installation Maintenance and Repair Staff Only)

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	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Commercial Skills (Safety)	Aerial Lifts v2, CNA-PS4 eLesson (for Installation Maintenance and Repair Staff Only)	0.50
	Asbestos Awareness Part 1 v2, PS4 eLesson (for Installation Maintenance and Repair Staff Only)	1.50
	Confined Space Hazards for Construction (for Installation Maintenance and Repair Staff Only)	0.70
	Confined Space Hazards v3, CNA-PS4 eLesson (for Installation Maintenance and Repair Staff Only)	0.80
	Construction Mini-Module - Scaffolding (for Installation Maintenance and Repair Staff Only)	0.10
	Crane Hand Signaling, PS4 eLesson (for Installation Maintenance and Repair Staff Only)	1.30
	EMCOR Construction, CNA-PS4 Suite eLesson (for Installation Maintenance and Repair Staff Only)	2.00
	EMCOR Service, CNA-PS4 Suite eLesson (for Installation Maintenance and Repair Staff Only)	1.70
	Fall Protection v3, CNA-PS4 eLesson (for Installation Maintenance and Repair Staff Only)	0.90
	Introduction to NFPA 70E, Workplace Electrical Safety, 600 Volts (for Installation Maintenance and Repair Staff Only)	0.90
	Job Hazard Analysis, PS4 eLesson (for Installation Maintenance and Repair Staff Only)	0.70
	Ladder Safety v2, CNA-PS4 eLesson (for Installation Maintenance and Repair Staff Only)	0.40
	Lead Poisoning Awareness, PS4 eLesson (for Installation Maintenance and Repair Staff Only)	0.70
	Lockout/Tagout v3, PS4 eLesson (for Installation Maintenance and Repair Staff Only)	0.80
	OSHA 10: Construction Outreach Training	10.00
	OSHA 30: Construction Outreach Training	30.00
	Personal Protective Equipment (PPE) (for Installation Maintenance and Repair Staff Only)	2.10
	Preventing Back Injury v3, CNA-PS4 eLesson (for Installation Maintenance and Repair Staff Only)	0.70
	Preventing Slips, Trips, and Falls v3, CN (for Installation Maintenance and Repair Staff Only)	0.40
	Walking/Working Surfaces v3, CNA-PS4 eLesson (for Installation Maintenance and Repair Staff Only)	0.40



*Southern California Pipe Trades
District Council 16*

MIKE LAYTON
Business Manager
Financial Secretary/Treasurer

August 15, 2017

Mr. Steve Duscha
Employment Training Panel
P.O. Box 22650
Sacramento, CA 95822

Dear Mr. Duscha:

We support the application from EMCOR Mesa Energy Systems as it applies to training for our members.

Sincerely,

Mike Layton
Business Manager
So. CA Pipe Trades District Council 16

ML:cl
Opeiu#537/afl-cio



TRAINING PROPOSAL FOR
Novacap, LLC
17-0732

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Margarita Paccarelli
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$72,000.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$72,000.00	N/A	\$0.00	\$60,000.00

APPLICANT PROFILE

Company Summary	Novacap, LLC (Novacap) specializes in application specific multilayer ceramic capacitors and capacitor assemblies for the aerospace, military, medical, telecommunications, computer, and oil exploration market.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 185	US: 185	World Wide: 185
Turnover Rate (Applicant)	9.25 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will improve production operations, processes and manufacturing practices.
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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	80	\$18.00	50	\$900	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1987 and headquartered in Valenca, Novacap manufactures specific multilayer ceramic capacitors and capacitor assemblies for the aerospace, military, medical, telecommunications, computer and oil exploration market.

This will be Novacap's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>Training will focus on upgrading trainees' skills to remain current in the industry. Workers must train in the new SolidWorks Design system and cross-train in production operations, workflow and scheduling. In addition, training will include continuous improvement and focus on Lean and Six Sigma.</p> <p>ETP funds will help the Company expand its presence in the marketplace.</p>
Training Infrastructure and Administrative Plan	Novacap's Human Resources Department consisting of three staff members will be directly responsible for scheduling, training, delivery and documentation. Training will be delivered by in-house subject matter experts and will take place at its facility in Valencia.
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	
<p>All occupations will receive Continuous Improvement, Hazardous Materials and Manufacturing Skills. Managers and Supervisors will receive Management Skills training.</p> <p>Trainees who are not proficient in English will receive Literacy Skills training in Vocational English as a Second Language. Literacy training cannot exceed 45% of total training hours per trainee.</p>	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	

Delivery Method/Level	Productive Laboratory
Summary	
Production Staff will receive up to 40 hours of Productive Lab training in Manufacturing Skills.	

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, curriculum and program characteristics.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Continuous Improvement Skills	Decision Making
	Interpersonal Skills
	ISO Standards
	Leadership Skills
	Lean Manufacturing
	Process Improvement
	Six Sigma
	Teambuilding Skills
Hazardous Materials Skills	Hazardous Materials Handling
Management Skills	Management Training
Manufacturing Skills (ME) (Standard)	Assembly Procedures
	CNC
	Manufacturing Practices
	Production Operations/Workflow/Scheduling

Delivery Method /Level	E-Learning – Computer Based Training (CBT)	
Training Type (Level)	Planned Course Offerings	Standard Hours
Literacy Skills	Vocational English as a Second Language	24.00

Delivery Method /Level	Productive Laboratory
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	Assembly Procedures
	Manufacturing Practices
	Production Operation

PL Justification and Details		
Explain the need for productive laboratory (PL) training	PL training will be provided to Production Staff. A considerable amount of the training will take place in the production floor because of the complexity and precision required to run its various equipment. This training would be too expensive to replicate in a simulated setting.	
Describe the Equipment/Processes to be used in delivering the PL training	CNC and various production equipment	
Describe Trainer Qualifications	Managers, Supervisors, and Department Leads, who have 2+ years' experience in the organization and extensive technical knowledge.	
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	3
PLT Approval	Yes	



**TRAINING PROPOSAL FOR
OWENS HEALTHCARE, INC.
17-0905**

Panel Meeting Date: 12/08/2017
Regional Office: Sacramento Regional Office
Analyst Name: Jana Lazarewicz
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:		\$ 137,230.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 137,230.00	N/A	\$ 0.00	\$ 175,000.00

APPLICANT PROFILE

Company Summary	Owens Healthcare, Inc. (Owens Healthcare) specializes in the sales of pharmaceutical products and medical equipment. The Company also provides infusion therapy to treat conditions where oral medications would be insufficient.
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Industry Sector(s)	Retail
Priority Industry	No
No. Employees (Applicant)	State: 165 US: 165 World Wide: 165
Turnover Rate (Applicant)	5.00 %
Repeat Contractor	No
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)

Owens Healthcare will be upgrading the skills of its workforce to keep pace with new industry technology, products, and regulatory requirements.

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	162	\$ 15.00	41	\$ 615	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	40	\$ 20.00	47	\$ 940	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1957 and headquartered in Redding, Owens Healthcare is a pharmacist owned healthcare company specializing in the areas of Retail Pharmacy, Compounding Pharmacy, Long-Term Care Pharmacy, Infusion Services, Medical Equipment, and Respiratory Services. The pharmacies offer specialized services for individuals including customized medications, pain management, concentrators and nebulizers, and IV antibiotics. Training will take place at all 20 locations in Butte, Lassen (2), Shasta (11), Siskiyou (2), Sutter, Tehama (2), and Trinity counties.

This will be Owens Healthcare's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>Owens Healthcare has designed an extensive training program focusing on standards and regulations and its new software system, Pioneer Pharmacy. The training program will also cover medical equipment operation, drug education, infusion techniques, and long-term patient pharmacy care.</p> <p>Standards and regulations are continually changing in the industry. For example, the California Board of Pharmacy recently revised current state laws to ensure regulations are aligned with federal compounding and hazardous drugs standards. This requires training on new processes including handling, preparing, documenting, and administering of prescription drugs; policies and procedures; and quality assurance to remain in compliance with state and federal health care requirements.</p> <p>The Company has also implemented a new software system, Pioneer Pharmacy which focuses on managing patient information, processes, and products. The system is used across all facilities, allowing staff to keep track of all pharmacy activities including inventory, point of sale transactions, patient drug usage, and other valuable treatment information. Training will ensure employees are utilizing the system efficiently and accurately to offer quality patient care.</p>
Training Infrastructure and Administrative Plan	<p>Owens Healthcare has designated the Human Resources Manager and Human Resources Generalist to plan, schedule, and implement the training plan across all participating locations. Each location also has a designated person to collect rosters and implement the Company's training plan. Trainers will be in-house subject-matter experts.</p> <p>The Company has delivered similar trainings and already has a training plan in place. The Company also has administrative processes in place to ensure uniform implementation and successful completion of training, including retaining the services of</p>

PROPOSED TRAINING PROJECT DETAILS

	a third-party administrative subcontractor to assist with all administrative requirements.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations (Attachment 1) will receive training in Business, Commercial, Computer, Continuous Improvement, and Hazardous Materials Skills topics (Attachment 2).	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
Trainees will receive E-Learning training in Business, Commercial (including OSHA 10/30), Computer, Continuous Improvement, and Hazardous Materials Skills topics (Attachment 2).	

4. Additional Company or Training Project Details

Retrainee - Job Creation

Owens Healthcare has achieved 25% growth over the past year with the addition of long-term care pharmacy services. The Company anticipates further growth over the next two years as it continues expanding services. The Company has committed to hiring 40 new employees across 14 locations (Group Number 2) to meet demands of increasing client base. This includes Pharmacy Staff, Pharmacy Managers, Administrative Staff, Field Techs, Long-Term Care Staff, Marketing Representatives, and Reimbursement Staff. To be eligible for reimbursement under this Group Number, the trainees must be hired into full-time permanent positions within the three-month period prior to Panel approval or during the term of contract. These trainees will be hired into "net new jobs" as a condition of contract.

Special Employment Training

Under SET, the participating employer is not required to demonstrate out-of-state competition. To qualify under SET, trainees must be earning at least the statewide average hourly wage at the end of the retention period; however, many of the companies locations are with a High Unemployment Area and will only be required to meet the Reduced Standard Wage.

PROPOSED TRAINING PROJECT DETAILS

Frontline Managers

According to Owens Healthcare, Pharmacy Managers are directly involved in the delivery of pharmaceutical goods and services. Based on the nature and scope of their job duties, these trainees meet the Panel's definition of frontline worker, which qualifies them under Special Employment Training (SET) funding.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Propel Consulting Group	El Dorado Hills	\$ 8,000.00
Administrative	Propel Consulting Group	El Dorado Hills	Not to exceed 13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Coaching
	Leadership
	Motivation
	Team Building
Commercial Skills (Standard)	Compounding
	Drug Education
	Immunization
	Infusion Techniques
	Joint Commission
	Lock-Out Tag-Out
	Long-Term Care
	Medical Equipment Operation
	OSHA 10
	OSHA 30
	Patient Care Techniques
	Patient Education
	Pharmacist Consulting
Computer Skills (Standard)	Brightree
	Cerner Etereby
	Compounder/PK Software
	CPR Plus
	Framework
	Great Plains
	Intermediate/Advanced Microsoft Office
	Pioneer Pharmacy
Continuous Improvement Skills	Drug Administration
	Preventing Fraud, Waste, and Abuse (Health Benefits and Claims)
	HIPPA Compliance
	Quality Assurance
	Regulatory Updates
Hazardous Materials Skills	Blood Born Pathogens
	Hazard Communications
<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Coaching
	Leadership
	Motivation
	Team Building

Attachment 2 - Training Delivery and Curriculum Listing

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

Commercial Skills (Standard)	Compounding
	Drug Education
	Immunization
	Infusion Techniques
	Joint Commission
	Lock-Out Tag-Out
	Long-Term Care
	Medical Equipment Operation
	OSHA 10
	OSHA 30
	Patient Care Techniques
	Patient Education
	Pharmacist Consulting
	Computer Skills (Standard)
Cerner Etreby	
Compounder/PK Software	
CPR Plus	
Framework	
Great Plains	
Intermediate/Advanced Microsoft Office	
Pioneer Pharmacy	
Continuous Improvement Skills	Drug Administration
	Fraud, Waste, and Abuse
	HIPPA Compliance
	Quality Assurance
	Regulatory Updates
Hazardous Materials Skills	Blood Born Pathogens
	Hazard Communications



**TRAINING PROPOSAL FOR
 Promise Hospital of East Los Angeles, L.P.
 17-0834**

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Mark Reeves
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:		\$ 84,700.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 84,700.00	N/A	\$ 0.00	\$ 182,400.00

APPLICANT PROFILE

Company Summary	Headquartered in Paramount, Promise Hospital of East Los Angeles, L.P. (Promise) is a 213-bed hospital specializing in long-term acute care services.
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Industry Sector(s)	Healthcare
Priority Industry	Yes
No. Employees (Applicant)	State: 777 US: 777 World Wide: 777
Turnover Rate (Applicant)	4.00 %
Repeat Contractor	Yes
High Unemployment Area	No
Union(s)	No

TRAINING PROFILE

Training Objective(s)	The proposed training is designed to provide nursing staff with the medical expertise and critical thinking skills to improve the Hospital's existing specialized units, as well as enhance its ability to move into new specialties such as Medical-Surgical and Emergency.
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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	126	\$ 18.00	25	\$ 450	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	14	\$ 20.00	100	\$ 2,000	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2003, Promise is a long term acute care hospital with treatment plans specifically designed for critically ill and medically complex patients. Patients are typically referred to Promise because the severity and complexity of their condition precludes them from being accepted into a rehabilitation hospital or a skilled nursing facility.

Promise is a two-campus hospital with the principal location being its 177-bed Suburban Medical Center in Paramount. The Hospital also has a 36-bed facility at its East Los Angeles campus near downtown Los Angeles. The Paramount location will be the participating facility in the proposed project. This is the second ETP project for Promise, the second in the last five years.

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

The scarcity of skilled healthcare professionals continues to impact all of the caregiver disciplines at Promise. The Hospital has instituted a new policy enforcing the importance of training. Each level of care at Promise requires nursing staff to receive specialized training on new and existing programs, new and upgraded equipment, and specialty programs such as multi-organ failure, spinal cord injury, head injury, and post-surgical complications.

The prior ETP Agreement focused on skills upgrade training for incumbent nurses and allied healthcare staff in Intensive Care services, Telemetry Nursing, Medical/Surgical Nursing, Advanced Cardiac Life Support and Rapid Response Skills.

In this project, Nursing staff will receive comprehensive education on process improvements and equipment upgrades across multiple areas including admissions systems, documentation and reporting, case management, gastrointestinal procedures, interventional radiology, outpatient rehabilitation, cardio-pulmonary, and orthopedic surgical procedures.

Training will take place at the Hospital's facility in Paramount. Instruction will be provided by in-house subject matter experts.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Promise has a current training budget of approximately \$74,000. The Hospital's Principal Trainer/Director of Education will take the lead in scheduling, delivering, and documenting training. There is also a trainer responsible for New Graduate Nurse instruction. Additional trainers may be identified during the contract term. Promise has also retained a consultant to assist with administration and training documentation.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All trainees will receive Continuous Improvement and Medical Skills (didactic) training.	

Delivery Method/Level	Productive Laboratory
Summary	
All trainees will receive Medical Skills (preceptor) training.	

4. Additional Company or Training Project Details

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

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.

Promise has committed to hiring 14 New Graduate Nurses (Group 2) to support the Hospital's effort to improve patient care and enhance its overall scope of services to the community.

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.

PROPOSED TRAINING PROJECT DETAILS

4.1 Program Waivers

Provided here are the waivers and their descriptions that apply to this Panel Proposal.

Waivers	Description
Retention Period for Occupations/ Trades	For Nurses and Allied Healthcare workers, the definition of full-time employment may be modified from an average of 35 hours a week to an average of 30 hours a week in a 90-day period. Retention for these workers may also be satisfied by working at least 500 hours within 272 consecutive days.

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 Refund Group	Anaheim	\$ 8,000.00
Administrative	Training Refund Group	Anaheim	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
	Paramount	05/04/12 – 05/03/14	\$248,976	\$83,600	34%
Notes	<p>Poor performance was due to the departure of the Director of Education and the subsequent lack of project coordination. The Hospital replaced its Director of Education and also changed out several senior managers who lacked support for training initiatives. Promise believes it now has the necessary personnel in place to support the Hospital's commitment to training as an institutional priority.</p> <p>The proposed Agreement has been right-sized to a level in alignment with prior earnings.</p>				

PROPOSED TRAINING PROJECT DETAILS

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Continuous Improvement Skills	Advance Directives
	Case Management/Discharge Planning
	Charge Nurse Training/Frontline Leadership Skills
	Code Orange/Hazardous Spills/Safety Data Sheet
	code pink/purple -abduction
	code silver/weapon
	code yellow/bomb threat
	Communications Skills
	Conflict Resolution Skills
	conservatorship
	CORE Measures
	Crisis Prevention Intervention (CPI)
	Critical Thinking Skills
	Culturally Appropriate Care
	culture of safety
	Customer Service Skills
	customer service/patient complaints/grievances
	Documentation Skills
	E-Priv
	employee health/safety
	Equipment Failure /Lock Out Tag Out
	Health Insurance and Accountability Act
	Hospital basics
	Information Systems
	Lean Six Sigma
	Occurrence Reporting
	Organization and Time Management Skills
	Patient and Family Centered Care Skills
	Patients Rights
	power of attorney
	Preceptor Skills
	sentinel events
	Team Building Skills
utility failure	
Utilization Review	
Medical Skills (didactic)	Abuse and Neglect
	Body Mechanics
	Code Blue
	Direct Observation Unit Training

Attachment 2 - Training Delivery and Curriculum Listing

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

	Intensive Care Critical Care Training
	Long Term Care Unit Training
	Medical/Surgical Unit Training
	Medication Management and Safety
	Palliative Care
	Patient Movement/Lifting
	Radiation Safety
	Restraints

Delivery Method /Level	Productive Laboratory
Training Type (Level)	Planned Course Offerings
Medical Skills (preceptor)	Direct Observation Unit Training Intensive Care/Critical Care Training Long Term Care Unit Training Medical/Surgical Unit Training
PL Justification and Details	
Explain the need for productive laboratory (PL) training	RNs and New Graduate RNs will receive preceptor-led clinical training, which is characterized as Productive Lab (PL) in the ETMS system.
Describe the Equipment/Processes to be used in delivering the PL training	Various medical equipment/devices used for direct patient care will be included in the training. Trainees will be assigned a preceptor who will teach, mentor, and develop RN skills.
Describe Trainer Qualifications	Trainers will be certified in-house subject matter experts, primarily experienced RNs.
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer
Ratio for One Class, or Minimum When More than One Class	1
Ratio for Maximum Ratio When More than One Class	1
PLT Approval	Yes



TRAINING PROPOSAL FOR
Pyramid LA Management L.P. dba Sheraton Gateway Los Angeles Hotel
17-0878

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Jela Romero
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 221,550.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 221,550.00	N/A	\$ 0.00	\$ 240,000.00

APPLICANT PROFILE

Company Summary	Pyramid Hotel Group was founded in 1999 and is headquartered in Boston, MA. It manages over 71 hotels and resorts throughout the continental United States, Hawaii, the Carribean, Ireland and the United Kingdom. Pyramid Hotel Group is the employer of Pyramid LA Management L.P. dba Sheraton Gateway Los Angeles Hotel (Pyramid-Sheraton). Pyramid-Sheraton will hold this ETP Agreement. Training in this proposal is solely for employees at Pyramid - Sheraton.

Industry Sector(s)	Services (Other)
Priority Industry	No

No. Employees (Applicant)	State: 1020	US: 9200	World Wide: 10460
Turnover Rate (Applicant)	8.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	Hotel and Restaurant Workers / Local 11		

TRAINING PROFILE

Training Objective(s)	Pyramid-Sheraton is requesting funding for training to increase the level of customer service and meet travelers' expectations. With recent renovations, housekeeping staff needs to train in new processes of cleaning and maintenance. A new restaurant was added which necessitates training for food and beverage staff. The engineering staff need retraining to effectively service and maintain new heating and air-conditioning units. The redesigned lobby, meeting rooms, and offices were also outfitted with a new computer system that necessitates process training for Administration, Sales, Accounting, and Front Desk staff who must accommodate a large volume of customers. Hotel Managers and Supervisors need retraining to lead their teams in the new environment.
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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	422	\$ 15.00	30	\$ 525	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Pyramid LA Management L.P. dba Sheraton Gateway Los Angeles Hotel (www.sheraton.com), (Pyramid-Sheraton) seeks ETP funding for retraining employees at its hotel in Los Angeles.

Pyramid-Sheraton caters to tourists and business travelers from across the United States and internationally. It offers guest bedrooms, conference rooms and convention facilities, and other amenities. More than 25% of company revenue is attributed to out-of-state customers. Pyramid-Sheraton qualifies for standard retraining.

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>The hotel and resort industry is constantly changing, necessitating hotel maintenance/renovations every 5 years, and complete renovations every 10 years. Pyramid-Sheraton is in the final stages of its renovation process which includes changes and upgrades in their guest rooms, bathrooms, restaurants, lobby area, recreation and swimming pool area.</p> <p>Pyramid Sheraton's goal is to improve their Guest Service Score, critical to maintaining the hotel's current 4-Star Forbes rating. To achieve this, employee skills need to be upgraded in areas of Business Skills, Computer Skills, Continuous Improvement, and Management Skills.</p>
Training Infrastructure and Administrative Plan	<p>Pyramid - Sheraton has retained the services of National Training Company for administration of the ETP project. Pyramid-Sheraton has a detailed training plan in place and is ready to start training upon approval. Pyramid-Sheraton's Director of Human Resources and 2 other staff assistants will oversee all other aspects including scheduling training and ensuring training completion is documented for ETP reimbursement. Training will be delivered by a combination of in-house staff and outside vendors.</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

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>BUSINESS SKILLS: This training will be provided to all staff. Training will enable the Company to improve customer service for internal and external customers. It will also improve the interpersonal communication of employees toward each other and to customers.</p> <p>COMPUTER SKILLS: This training will be given to all occupations. Computer Skills training will enable workers to effectively use computer applications and train on the Company's new phone system to complete their job-related duties.</p> <p>CONTINUOUS IMPROVEMENT: Training will be provided to all occupations. This training is critical in maintaining superior ratings in inspections and reviews. Continuous Improvement training will include methods in a leaner work process as well as teambuilding and critical thinking skills.</p> <p>MANAGEMENT SKILLS: This training will be provided to Managers only. This training will improve Manager's skills to help them meet the needs of their employees.</p>	

4. Additional Company or Training Project Details

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

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	National Training Company (NTC) sbenson@gmail.com	Middletown, CA	No Cost
Administrative	National Training Company (NTC) sbenson@gmail.com	Middletown, CA	13%
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

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 Processes
	Communication & Interpersonal Skills
	Dealing With Difficult People
	Guest Service Skills
	Hospitality and Communication Skills
	Identifying/Meeting Guest Needs
	Negotiating Skills
	Operating Procedures
	Putting the Guest First
	Resolving Guest Complaints
	Service Values
	Computer Skills (Standard)
Computer Application Skills	
Customer Information Systems	
Internal Customer Applications	
MS Office (Intermediate and Advances)	
Point of Sale Applications	
Procurement Software	
Reservation Systems	
Sales Reports & Scheduling Software	
Smartphone Technology and Application Skills	
Tablet Technology and Application Skills	
Continuous Improvement Skills	Critical Thinking Skills
	Measuring for Success
	Problem Solving and Resolution
	Standard Work Procedures
	Team Building Skills
	VESL
Management Skills	Accountability & Taking Responsibility
	Change Management
	Coaching & Mentoring
	Communication Skills
	Conflict Resolution
	Empowerment
	Motivation & Attitude Improvement
	Professionalism
	Relationship Building
	Supervisory Skills
	Teamwork

UNITE HERE! LOCAL 11

September 11, 2017

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

Re: Sheraton Gateway Los Angeles Hotel. Employment Training Panel.

UNITE HERE Local 11 (the "Union") supports the proposed Employment Training Panel (ETP) Sheraton Gateway Los Angeles Hotel project, submitted to the Panel in September 2017, and the various types of training opportunities the project will provide to the Sheraton Gateway's (the "Hotel's") employees.

The training under this grant will be available to employees in all departments of the Hotel.

The Hospitality Training Academy (HTA), a 501(c)(3) non-profit institution and the UNITE HERE Local 11 Taft-Hartley Fund, is also supported by the Union. The HTA will act as a sub-contractor under this grant to train the UNITE HERE Local 11 workers.

Sincerely,



Ada F. Briceno
Co-President, UNITE HERE Local 11

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Inglewood, CA 90304
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TRAINING PROPOSAL FOR
Quad Knopf, Inc.
18-0533

Panel Meeting Date: December 8, 2017
Regional Office: Sacramento Regional Office
Analyst Name: Cristina Kaiser
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:		\$ 73,892.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 73,892.00	N/A	\$ 0.00	\$ 75,000.00

APPLICANT PROFILE

Company Summary	Quad Knopf, Inc. (QK) is an engineering firm dedicated to developing California's infrastructure. The Company provides engineering, surveying, land mapping, and construction management services.
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Industry Sector(s)	Professional, Scientific, and Technical
Priority Industry	Yes
No. Employees (Applicant)	State: 98 US: 98 World Wide: 98
Turnover Rate (Applicant)	11.00 %
Repeat Contractor	Yes
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	To remain competitive, QK is adding new software to aid staff with improving efficiency and accuracy. The Company is also adding a new line of land surveying service utilizing aerial drones, requiring extensive training for remote pilots.
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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	98	\$ 26.00	29	\$ 754	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

QK seeks ETP funding for retraining. Founded in 1972, and headquartered in Visalia, the QK has 5 locations in California: Bakersfield, Fresno, Merced, Visalia, and Roseville. All locations will participate in training with the Visalia location acting as the lead. QK assists clients with planning and development of construction projects through to finalization of construction. Customers include both private and public sector clients such as municipalities, commercial developers, school districts, and major construction companies throughout California and the Western Region of the United States. Building projects include structures in the education, government, energy, and water industries. This will be the fourth ETP project, the third in the last five years.

2. Current Training Project Details

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

Purpose of Training	<p>In QK's prior agreement, the Company focused training on project management and management skills. Training in this Agreement will ensure that QK remains competitive in its industry and is able to increase the Company's clientele.</p> <p>QK's industry is highly competitive and the Company must be able to present clients with a seamless proposal to solidify the contract bid. The Company has purchased new software (New Forma Doc Management and Virtual Desk Operating platform), to enable staff to provide more complete proposals. QK is also updating their current software, G.I.S. Mapping, DelTek Vision, and CAD/CAD 3D. All staff will require job specific training to improve knowledge and proficiencies.</p> <p>Another focus of training is QK's expansion into land surveying using aerial drones. Drone operation will require extensive training as each remote pilot is required to be trained and licensed per FAA regulations. Drone training will consist of flying the craft and utilizing Pixel 4D software to conduct land surveying operations. Drone training is specific to surveyors and project managers for the Visalia, Merced, and Bakersfield locations.</p> <p>The Company also recognizes the need for improved project management skills. Staff will receive extensive training in such topics as effective sales/marketing, business development, financial management, and managing client relationships.</p>
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PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	<p>ETP funds will not displace the existing financial commitment to training. The Company's annual training budget per facility is approximately \$75,000 for new employee orientation, safety training, coaching and new hire training. Safety training is provided in accordance with all pertinent requirements under state and federal law.</p> <p>The Company's CFO will oversee the implementation of training and administration duties along with five designated staff members throughout each participating location. The lead location (Visalia) will house all ETP documentation.</p> <p>In addition, QK has retained Strategic Business Solutions, LLC to provide assistance with the administrative requirements of this agreement.</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 and E-Learning – Instructor Led/Distance Learning
Summary	
All occupations (see Attachment 1) will receive training in Business, Commercial, Computer, and Continuous Improvement Skills (see Attachment 2).	

4. Additional Company or Training Project Details

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

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).

PROPOSED TRAINING PROJECT DETAILS

Subcontractor Type	Subcontractor Name	City	Service Cost or %
Development	Strategic Business Solutions, LLC	Visalia	\$5,172
Administrative	Strategic Business Solutions, LLC	Visalia	Not to exceed 13% of funding earned.
Training	AEC Business Solutions, LLC (Project Management Training*)	Reston	\$ 40,000.00

*Quad Knopf has requested and been approved to use this out-of-state vendor as the project management training is an industry specific training. It is proprietary to AEC and therefore, the AEC is the only vendor available to provide training services.

4.3 Previous ETP Project Summary

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET13-0349	Fresno, Visalia, Roseville, Bakersfield	4/29/13 to 4/28/14	\$18,200	\$18,063	99%

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	Project Management
Commercial Skills (Standard)	Drone Operation for Plotting Surveying Mapping
	G.I.S. Mapping
Computer Skills (Standard)	CAD/CAD 3D
	DeITek Vision Softw
	G.I.S Mapping Software
	New Forma Doc Mgmt Software
	Pixel 4D Software
	Virtual Desk Operating Platform
Continuous Improvement Skills	Leadership
	Process Analysis
	Teambuilding

<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Budgeting
	Business Development
	Financial Management
	Managing Client Relationships
	Marketing
	Project Costs and Estimating
	Project Management
	Resource Management
	Sales Effectiveness



TRAINING PROPOSAL FOR
Renovo Solutions, LLC
17-0916

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Heather Bernard
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:		\$99,000.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$99,000.00	N/A	\$0.00	\$154,590.00

APPLICANT PROFILE

Company Summary	Founded in 2009 and located in Irvine, Renovo Solutions, LLC(Renovo) provides management and technical support solutions for hospitals and medical centers for medical equipment service and information technology.
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Industry Sector(s)	Services (Other)
Priority Industry	No
No. Employees (Applicant)	State: 90 US: 245 World Wide: 245
Turnover Rate (Applicant)	10.00 %
Repeat Contractor	Yes
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will focus on healthcare regulatory updates, cybersecurity and ISO 9001.
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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	90	\$22.00	50	\$1,100	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

The Company's Biomedical Engineers service sophisticated clinical/medical equipment and provide on-going safety and preventive maintenance inspections. Renovo's Engineering staff work with hospital health care information technology departments to efficiently network all medical devices with the hospital's existing computer systems.

This will be Renovo's fourth ETP Agreement, and the fourth in the last five years. The first Agreement trained employees in the Company's proprietary software system. The second ETP Agreement delivered training in software upgrades. The third Agreement trained staff in new medical accreditation and the proper usage of clinical alarms for medical equipment. There will be no duplication of training for trainees who participated in previous ETP Agreements.

2. Current Training Project Details

Purpose of Training

The medical industry and associated regulations are constantly changing. Renovo must continually provide training to provide the best customer service. One major change is a new regulation by the federal Department of Health and Human Services, regulating the performance of hospital equipment maintenance and use. This new rule was implemented to ensure an acceptable level of safety and quality for medical equipment by requiring most hospitals revise their policies and procedures for equipment maintenance compliance. As a result, Renovo Account Managers must be well trained on the new standard to assist hospitals in adopting the new regulation.

Hospital medical equipment is changing and is more reliant on software to support clinical and interoperability demands. As a result, hospitals IT systems are increasingly integrated and complex, improving workflow and clinical decision making, but increasing risks of cyberattacks. To support medical IT staff and address evolving risks, Renovo is implementing an Integrated Systems Management model to assist the hospitals in compliance and control of its IT infrastructures. Engineers must be trained on the necessary software coding, networking and medical hardware to implement these new systems for customers.

Finally, Renovo it is adopting the International Organization for Standards 9001 (ISO9001), the international standard that specifies requirements for a quality management system. The Company hopes to achieve improved customer services and staff must be trained in concepts, process and procedures, communication and organizational skills associated with ISO 9001:2015.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Renovo's CEO and the Corporate Contract Specialist will oversee all training. The Company will also utilize Training Funding Source as an administrative subcontractor. Training will be delivered by in-house experts and vendors as needed. No training will be duplicative from the prior project.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training in Business, Commercial, Computer and Continuous Improvement Skills.	

4. Additional Company or Training Project Details

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

The applicant has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$ 5,900.00
Administrative	Training Funding Source	Seal Beach	13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

The table below summarizes the active performance under the ETP contract.

Active Contract(s) Elements	Summary
Contract Number	ET16-0311
Purpose of Training	New medical accreditation and medical equipment clinical alarms.
Location(s)	Orange
Term	12/22/15 – 12/21/17
Approved Amount	\$99,220
Projected Earnings	\$99,220
Performance Percentage	100%
Trainee Details	Retrainee & Job Creation
Other Notes	ETP Online Systems shows the eligible training hours tracked is over 100% of the Agreement amount.

The table below summarizes Contractor's performance under prior ETP contract) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET14-0220	Orange	11/25/13 – 11/24/15	\$88,000	\$87,104	99%
ET12-0256	Orange	12/31/11 – 12/30/13	\$51,876	\$51,876	100%

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Customer Communications & Follow-Up
	Procurement Skills
Commercial Skills (Standard)	Troubleshooting and Repairs on Medical Equipment
	Troubleshooting Networked Equipment
	Cybersecurity
	Equipment Management - Process and Procedures
	Equipment Performance and Inspection Procedures
	ISO Standards 9001:2015
Computer Skills (Standard)	Accounting Software
	Integrated Systems Management (ISM) - CE-IT Live
	Microsoft Office Suite
	RenovoLive Software
Continuous Improvement Skills	Organizational Skills
	Project Management Skills
	Risk Assessment and Planning



**TRAINING PROPOSAL FOR
SETTON PISTACHIO OF TERRA BELLA, INC.
18-0571**

Panel Meeting Date: December 8, 2017
Regional Office: Sacramento Regional Office
Analyst Name: Jesse Dongallo
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 81,360.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 81,360.00	N/A	\$ 0.00	\$ 127,000.00

APPLICANT PROFILE

Company Summary	Setton Pistachio of Terra Bella, Inc. (Setton) is a family-owned and operated company specializing in the manufacturing of pistachio products.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 888	US: 888	World Wide: 888
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on new production equipment upgrades, and improving efficiency and quality processes to meet customer demand.
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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	40	\$ 18.00	113	\$ 2034	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1995 and headquartered in Terra Bella, Setton is one of America's largest pistachio producers and are experts in the growing, harvesting, processing, roasting, and packaging of pistachios.

Setton owns over 10,000 acres of pistachio orchards in the San Joaquin Valley with the capacity to process over 110 million pounds of pistachios annually in conjunction with other local growers.

The Company provides pistachios to more than 50 domestic and foreign markets and distributes a variety of privately labelled pistachio products and dried fruits, such as cranberries and blueberries, to wholesalers and retailers throughout the United States. Companies such as Costco, Walmart, Sam's Club, BJs, Save Mart, Food Maxx, Rite-Aid and CVS are just some of the businesses that sell Setton products.

Training will be conducted at Setton's Terra Bella facility.

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

This is Setton's first ETP proposal. As one of the country's largest suppliers of Pistachio products, Setton will focus its training plan on staff development and industrial manufacturing processes. Training will lower production costs, improve competitiveness within the industry, and promote the procurement of additional contracts.

Setton has invested over \$8 million in robotic equipment for its packaging process and contracted with San Joaquin Valley College (SJVC) to provide programmable logic training. Training will be delivered using Allen Bradley equipment and RSLogix software. Ten trainees working in the mechanic, maintenance, production and IT occupations will attend this course conducted at SJVC for a mandatory 18 hours per week for ten weeks. Training will cover the following modules:

- Fundamentals of Programmable Logic
- Programming Logic Controllers (PLC)
- Inputs and Outputs for PLC
- Troubleshooting PLC
- Communications and Advance Programming
- RSLogix, Configuring Hardware and Software
- RSLogix, Programming and Editing

PROPOSED TRAINING PROJECT DETAILS

	<ul style="list-style-type: none"> • RSLogix, Testing and Troubleshooting <p>In addition to PLC training, ten different trainees working in the maintenance and electrical occupations will participate in an Industrial Electricity course at SJVC for a mandatory 18 hours per week for ten weeks. Training will focus on complex electrical functions and modifications related to Setton’s robotic processing equipment. Training will cover the following modules:</p> <ul style="list-style-type: none"> • Principles of Electrical Theory • Alternating Current and Direct Current Generation • Conductors • Wiring and national Electric Code • Installation, Distribution and Lighting Circuits • Generators and Motors • AC Motor Controls and Measurements <p>Improvement in these areas will lead to higher production to meet increased customer demand.</p>
<p>Purpose of Training (cont’d)</p>	<p>In the beginning of 2018, Setton will install another \$3 million in automated systems for their raw processing unit. Training Supervisors and the remaining trainees will be focused on this new equipment, other upgraded systems, continuous improvement, and management skills targeted to improve trainee’s operational proficiency.</p>
<p>Training Infrastructure and Administrative Plan</p>	<p>Setton’s General Manager, Maintenance Manager, and HR Director will oversee all training efforts. The Maintenance Manager will be working with other department managers with varied technical expertise in Management and Industrial Manufacturing skills.</p> <p>In addition, Setton will use a third-party administrator, SJVC, to assist with administration. The Company’s HR team will work closely with SJVC to ensure all administrative and recordkeeping requirements are met.</p>
<p>Marketing Plan (MEC Only)</p>	<p>N/A</p>
<p>Support Cost Description (MEC Only)</p>	<p>N/A</p>
<p>Substantial Contribution Description</p>	<p>N/A</p>

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery*

PROPOSED TRAINING PROJECT DETAILS

and Curriculum Listing provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations (Attachment 1) will receive training in Management Skills, Continuous Improvement and Manufacturing Skills.	

Delivery Method/Level	Classroom/Simulated Laboratory (Advance Technology)
Summary	
Mechanics, Maintenance, Production and IT occupations (Attachment 1) will receive Advanced Technology training in Manufacturing Skills.	

4. Additional Company or Training Project Details

Advanced Technology Justification

Mechanics, Production, IT and Maintenance staff require an in-depth understanding of automated robotics equipment. Advanced Technology (AT) skills are crucial to keep current with complex technology necessary to program/code and fully operate customized controlled equipment.

Setton has contracted with SJVC to deliver this specialized AT training for a fee of \$2,900 per trainee. Training will take place at SJVC's advanced training center in Visalia. The trainer-to-trainee ratio will not exceed 1:10, to allow in-depth coverage and personal attention from the instructor.

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	San Joaquin Valley College	Visalia	\$500
Administrative	San Joaquin Valley College	Visalia	Not to exceed 13% of funding earned
Training	San Joaquin Valley College	Visalia	\$58,000

4.3 Previous ETP Project Summary

Setton has no prior ETP Agreements.

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training

PROPOSED TRAINING PROJECT DETAILS

population, the detailed curriculum, and associated program characteristics related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Continuous Improvement Skills	Critical Thinking
	Decision Making
	Leadership
	Problem Solving
	Process Improvement
	Strategic Planning
Management Skills	Business Management Functions
	Delegation
	Motivation
	Planning and Organization
	Principles of Management
	Team Building
	Time Management
Manufacturing Skills (ME) (Advanced Technology)	Communication and Advanced Programming
	Fundamentals of Programmable Logic
	Inputs and Outputs for PLC
	Programmable Logic Controllers
	Programming Logic Controllers
	RS Logic configuring Hardware and Software
	RS logic programming and editing
	RS Logic Testing and Troubleshooting
	Troubleshooting PLC
Manufacturing Skills (ME) (Standard)	AC and DC current alternating differences
	AC and DC Current Generation
	AC Motor Controls and Measurement
	Basic Electrical Theory
	Basic Symbols, motor control Logic Diagrams
	Color Coding of Wiring and National Electrical Code
	Conductors
	Generators and Motors
	Industrial Electricity
	Installation Distribution and Lighting Curcuits
	Power Distribution and Electrical Curcuits
	Single and Three phase alternating currents
	Sodering Techniques
	Wiring Diagrams



**TRAINING PROPOSAL FOR
SST Construction, LLC
17-0818**

Panel Meeting Date: December 8, 2017
Regional Office: Sacramento Regional Office
Analyst Name: Jesse Dongallo
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 168,000.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 168,000.00	N/A	\$ 0.00	\$ 200,000.00

APPLICANT PROFILE

Company Summary	SST Construction, LLC (SST Construction) is a solar construction company that specializes in providing installation, operations and maintenance services to commercial and residential customers nationwide.
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Industry Sector(s)	Construction		
Priority Industry	Yes		
No. Employees (Applicant)	State: 160	US: 180	World Wide: 180
Turnover Rate (Applicant)	0.00 %		
Repeat Contractor	No		
High Unemployment Area	Yes		

N/A

TRAINING PROFILE

Training Objective(s)

SST Construction's training plan aims to improve construction and installation processes, maximizing efficiencies.

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	145	\$ 18.00	40	\$ 720	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	53	\$ 20.00	60	\$ 1200	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2013 and headquartered in Rancho Cordova, SST Construction specializes in the commercial and residential installation/operation and maintenance (O&M) of solar panel systems. From initial commissioning to ongoing O&M and asset management support, SST Construction ensures optimal system performance, minimal system downtime and maximized system production values. Customers range from commercial buildings, such as the Golden1 Center in Sacramento, to residential neighborhoods throughout the United States.

Training will be conducted at SST Construction's four facilities located in Rancho Cordova, Fresno, Ontario, and Berkeley.

2. Current Training Project Details

Purpose of Training	<p>This will be SST Construction's first ETP contract. The Company is experiencing a significant period of growth and is expanding services to more territories. The Company needs to improve process efficiencies to lower costs and reduce construction times. Training will focus on enhancing operational skills through Lean processes to improve installation skills. Cross-training will also be provided.</p> <p>Software training will be provided to improve operator proficiencies and increase product knowledge</p>
Retrainee - Job Creation	<p>ETP provides incentives to companies that commit to hiring new employees. In this proposal, SST Construction has committed to hiring 53 employees (Group Number 2).</p> <p>The Company's customer base is expanding due to an increased demand for cost-efficient energy alternatives for commercial and residential markets. In the past year, the Company has doubled in size with projections for similar growth in 2018. SST Construction is one of very few companies that provide both maintenance and installation services for solar panels. The Company must hire more staff to meet customer expectations and needs.</p>
Training Infrastructure and Administrative Plan	<p>SST Construction's HR Director and Director of Operations will oversee training. Each participating location has a designated staff member to coordinate training and ensure record keeping requirements are met. In addition, SST Construction has retained the services of Sierra Consulting Services to assist with the completion of all ETP administrative requirements.</p> <p>The Company has 10 internal trainers. The trainers will provide role specific training to ensure all trainees have the necessary skills to perform their duties to industry standards.</p>

PROPOSED TRAINING PROJECT DETAILS

Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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 and E-Learning Instructor Led/Distance Training
Summary	
All occupations (Attachment 1) will receive training applicable to their jobs in Business, Commercial, Computer, Continuous Improvement, Hazardous Materials, OSHA 10/30 and Management Skills (Attachment 2).	

Delivery Method/Level	Productive Laboratory
Summary	
Trainees identified under Technician/Installer and Operations (Attachment 1) will receive training in Productive Lab (PL) Commercial Skills (Attachment 2).	

4. Additional Company or Training Project Details

Productive Lab

SST Construction will provide PL Commercial Skills courses such as tool operation, electrical systems, solar panel installation, and roof repair. Classroom training will precede PL training. PL training will ensure a greater understanding of skills. PL Training will result in much slower production while the trainee gains proficiency. The trainer will first demonstrate how to perform the task, then supervise and coach the trainee performing this same task. The trainer will confirm trainees' competency once training has been completed.

Training will be provided under constant supervision, with a 1:1 trainer-to-trainee ratio. PL training is capped at 60 hours per trainee.

4.1 Program Waivers

N/A

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Sierra Consulting Services	Cameron Park	\$ 15,000.00
Administrative	Sierra Consulting Services	Cameron Park	Not to exceed 13% of payment earned
Training	To be Determined	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Communication skills
	Conflict Resolution
	Cost Control
	Customer Relationship Management
	Customer Service
	Dealing with Difficult People
	Employee Coaching
	Financial Analysis
	Leadership
	Marketing/Sales Techniques
	Negotiations
	Operational skills
	Planning and Organization
	Product Knowledge
	Project Management
	Project Management and Methodology
	Relationship Building
	Retaining Customers
Strategic Planning	
Time Management	
Train the trainer	
Commercial Skills (Standard)	OSHA 10
	OSHA 30
Computer Skills (Standard)	Advanced Microsoft Office
	Autodesk?AutoCAD
	CRM
	Financial Management System
	Intermediate Microsoft Office
	Quickbooks
Continuous Improvement Skills	Change Management
	Creating a Quality Organization
	Decision Making
	How to coach and mentor
	Key Performance Indicators
	Lean Procedures Practices
	Meeting Management
	Problem Solving
	Process Improvement
	Production Operations/Workflow

Attachment 2 - Training Delivery and Curriculum Listing

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

	Production Scheduling
	Quality Measurement Systems
	Team Building
	Understanding Waste
Hazardous Materials Skills	Hazardous Materials Handling
Management Skills	Coaching Procedures
	Motivation
	Supervisor Skills
	Team Building
<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication skills
	Conflict Resolution
	Cost Control
	Customer Relationship Management
	Customer Service
	Dealing with Difficult People
	Employee Coaching
	Financial Analysis
	Leadership
	Marketing/Sales Techniques
	Negotiations
	Operational skills
	Planning and Organization
	Product Knowledge
	Project Management
	Project Management and Methodology
	Relationship Building
	Retaining Customers
	Strategic Planning
	Time Management
	Train the trainer
Commercial Skills (Standard)	Building Systems
	Electricity Overview
	Energy and Environmental Design
	Engineering Theory and Planning and Design
	Forklift Driving
	Inventory Control
	Inverters Overview, Installation and Repair
	Logistics
	Measurement and Measuring Devices
	Monitor Installation and Repair

Attachment 2 - Training Delivery and Curriculum Listing

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

	OSHA 10
	OSHA 30
	Permits and Local Regulations
	Procurement
	Solar Engineering and Design
	Solar Overview
	Solar Panel Overview, Installation, Repair
	Solar System Analysis and Repair
	Tool Operation
	Troubleshooting
	Work Order Processing
Computer Skills (Standard)	Advanced Microsoft Office
	Autodesk?AutoCAD
	CRM
	Financial Management System
	Intermediate Microsoft Office
	Quickbooks
Continuous Improvement Skills	Change Management
	Creating a Quality Organization
	Decision Making
	How to coach and mentor
	Key Performance Indicators
	Lean Procedures Practices
	Meeting Management
	Problem Solving
	Process Improvement
	Production Operations/Workflow
	Production Scheduling
	Quality Measurement Systems
	Team Building
	Understanding Waste
Hazardous Materials Skills	Hazardous Materials Handling
Management Skills	Coaching Procedures
	Motivation
	Supervisor Skills
	Team Building

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Commercial Skills	Electrical Systems
	Electrical Wiring
	Equipment Operation
	Inverters Installation and Repair

Attachment 2 - Training Delivery and Curriculum Listing

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

	Monitor Installation and Repair
	Roof Repair
	Solar Panel Installation and Repair
	Solar System Analysis and Repair
	Tool Operation
PL Justification and Details	
Explain the need for productive laboratory (PL) training	Occupations in Electrical Wiring, Electrical Machinery, and Operations need PL training in Commercial Skills. PL will help trainees install and troubleshoot solar panels, inverters and monitoring systems while out in the field. Trainees will work with components from several hundred manufacturers and accurately troubleshoot problems with many variables. Mistakes are costly. Training will ensure the final product is functioning within company standards.
Describe the Equipment/Processes to be used in delivering the PL training	Many new employees will need to job shadow experienced crew members for their first 2 weeks to learn best practices and be observed by supervisors to ensure trainees have learned the necessary skills. Training equipment includes hand tools, electrical tools, electrical wiring and solar equipment.
Describe Trainer Qualifications	Trainers are experienced employees and supervisors knowledgeable of processes and best practices.
Trainer to Trainee Ratios - If more than one PL class the ratios are the lowest and the highest trainer-to-trainee ratio	Trainer
Ratio for One Class, or Minimum When More than One Class	1
Ratio for Maximum Ratio When More than One Class	1
PLT Approval	Trainee
	1
	3
	Yes



RETRAINEE - JOB CREATION

Training Proposal for:

Sun Valley Specialty Healthcare Inc. dba Totally Kids

Agreement Number: ET18-0152

Panel Meeting of: December 8, 2017

ETP Regional Office: North Hollywood

Analyst: J. Romero

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 County	Repeat Contractor:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Number of Employees in:	CA: 212	U.S.:212	Worldwide: 212
Turnover Rate:	3%		
Managers/Supervisors: (% of total trainees)	0%		

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;">\$100,080</td></tr> </table>	Program Costs	\$100,080	-	<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;">\$100,080</td></tr> </table>	Total ETP Funding	\$100,080
Program Costs														
\$100,080														
(Substantial Contribution)														
\$0														
(High Earner Reduction)														
\$0														
Total ETP Funding														
\$100,080														

In-Kind Contribution:	100% of Total ETP Funding Required	\$160,000
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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	MS-Didactic, MS-Clinical Preceptor, Commercial Skills, Continuous Impr, Computer Skills	145	8-200	0	\$504	\$22.04
				Weighted Avg: 28			
2	Job Creation Initiative SET Priority Rate Medical Skills	MS-Didactic, MS-Clinical Preceptor, Commercial Skills, Continuous Impr, Computer Skills	45	8-200	0	\$600	\$14.13
				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 (SET/Priority Industry): \$22.04 per hour; Job Number 2 (SET/Priority Industry/Job Creation): \$14.13 per hour for Los Angeles County.

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

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

Up to \$2.25 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		
Registered Nurse		27
Licensed Vocational Nurse		60
Respiratory Care Practitioner		35
REHAB: Physical, Occupational & Speech Therapists		13
Administrative Staff		10
SUBTOTAL: (Job 1)		145
Job Number 2:		
Registered Nurse		4
Licensed Vocational Nurse		10
Respiratory Care Practitioner		3
REHAB: (Physical, Occupational & Speech Therapist)		20
Medical Transport		5
Administrative Staff		3
SUB TOTAL (Job 2)		45
TOTAL (Job 1 & Job 2)		190

INTRODUCTION

Sun Valley Specialty Healthcare Inc. dba Totally Kids (<https://totallykids.com>), (Totally Kids) is a 45-bed capacity healthcare facility in Sun Valley that specializes in sub-acute care and pediatric services (ICU & PICU) for children who are medically fragile and technology dependent. The Company specializes in the care and treatment of children from age 3 to 21 who are recovering from the effects of a complex illness or injury such as neurological, liver, hormonal, orthopedic, gastrointestinal and respiratory disorders. Totally Kids also offers short-term surgical recovery, case management and individual treatment planning.

PROJECT DETAILS

This is Totally Kids' first ETP Agreement. Totally Kids plans to train 190 employees of which 45 will be "net new hires." The Company will be expanding bed capacity from 45 to 60 due to constant changes in the healthcare industry and the increasing demand for services, allowing the facility to accommodate and benefit more patients who are in extreme need of the Company's specialty services. The Company also expanded its rehabilitation program by offering outpatient rehabilitation and purchasing new computer software and MED Therapy machines for respiratory care and treatment.

Training will focus on recently mandated documentation requirements, new reporting procedures, and newly installed software and medical equipment. Computer Skills training on the Abaquis Computer Software used for Electronic Medical recordkeeping (EMR) will ensure patient information is properly documented and accessible and uniform with all other healthcare providers, as required by federal mandates. Medical Skills Training will cover patient assessment and care, pain management, physical therapy skills and services, and equipment operation. Preceptor training will also be included to provide hands-on experience and assure that medical staff follow the same protocol. Continuous Improvement training in communication, conflict resolution and documentation will enhance these skill sets and improve the related processes and procedures. Commercial Skills training will increase awareness and understanding among care providers on how to respond to specific tasks required in performing their job.

Additionally, training will prepare newly hired Nurses and allied medical staff to successfully transition to the fast-paced acute care environment and upgrade standardized skill sets to provide competent and safe patient care. The training will assist in supporting the increased commitment and retention of new nurses within the organization to reduce nurse turnover.

Training Plan

Computer Skills: Training will be offered to all occupations. Trainees will use the Company's Abaquis/EMR software daily. Therefore, they must be capable of navigating this computer program.

Commercial Skills: Training will be offered all occupations. These topics will include industry-specific skills such as use of restrains, seizure protocol, identifying and responding to cardio-pulmonary distress and body mechanics and injury prevention.

Continuous Improvement: Training will be offered to all occupations to improve employee skill sets. Topics such as Communication Skills, Conflict Resolution and Documentation Skills will help trainees improve communication between staff and patients and ensure staff can properly document services provided.

Medical Skills Training: Training will be offered to nurses and therapists. Staff will receive Didactic/Preceptor training to remain current in medical treatment. Courses include Pediatric

Growth and Development, Cardiac Anomalies, Anticonvulsant Medication, Pressure Injury Stages and Wound Classification, oxygen administration and Sterile Technique Tracheal Suction.

The Panel has established a “blended” reimbursement rate for nurse upgrade training, recognizing the higher cost of delivery for the Clinical Preceptor model. All 155 nurses and therapists to be enrolled in the ETP-funded training will participate in Medical Skills Training. Staff will receive Didactic and Preceptor training to remain current in medical treatment. Training to be delivered will ensure employees are consistent in the level of care being provided to patients.

Special Employment Training/Priority Industry

Trainees under Special Employment Training (SET) must earn at least the Statewide Average Wage at the end of the retention period. The Panel may modify the minimum wage requirement for companies in priority industries such as healthcare, up to 25% below the state average hourly wage. The Company is requesting this wage modification, from \$29.38 to \$22.04.

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.

In this proposal, Totally Kids is expanding its facilities. The Company has committed to hiring 45 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. Trainees will be hired into “net new jobs” as a condition of contract.

Totally Kids will recruit, hire, and train 4 New RNs, 10 LVNs, 3 Respiratory Care Practitioners, 20 Rehabilitation Therapists, 5 Medical Transports and 3 Administrative Staff positions for newly created positions. The training from this proposal will help newly hired nurses and allied medical occupations to transition into the acute care environment.

Commitment to Training

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

Totally Kids spends approximately \$400,000 annually for training. Courses include new hire orientation, mandatory training, and Medical Skills training. Training delivered in the past has been both company-wide and job specific. The Company is committed to training its staff upon completion of the ETP program. Training will continue to be offered to staff members to ensure competency within the company and provide high-level healthcare to patients.

➤ Training Infrastructure

Totally Kids has a training plan in place and is ready to start training upon approval. The Company’s Education Director will administer the ETP Training program and will work with the Director of Staff Development, Director of Nursing, Director of Rehabilitation and Respiratory Manager to schedule, enroll, and track training. Trainers will be qualified subject-matter experts.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

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

8 – 200

Trainees may receive any of the following:

MEDICAL SKILLS TRAINING – DIDACTIC

- Physical Growth and Development: Pediatric
- Developmental Stages
- Provision of care for the Pediatric Patient
- Pediatric Assessment
- Cardiac Anomalies
- Seizure Disorder/ Epilepsy
- Vagal Nerve Stimulator
- Anticonvulsant Medication
- Spinal Cord Injury
- TBI Associated Spasms
- Neurological Disorders
- The Diabetic Resident
- Medical Equipment: Ventilators, Feeding Pumps, Pulse-Ox Machine
- Homeostasis/Acid/Base and Fluid Balance/Electrolytes
- Fall Prevention
- Infection Control
- Resident and Family Teaching
- Family Training Program
- Ostomy: Trach/ GT/ GJT/ Ileostomy/ Colostomy
- Managing Incontinence
- Pressure Injury Stages and Wound Classification
- Skin Issues/ Disorders
- Kidney Disease/ Peritoneal Dialysis
- Intermittent/ Continuous Suction: Oral/ Gastric
- Cardiac Anomalies: Surgical Repair
- Order Transcription
- Discarding Expired or Discontinued Medication
- Preventing HAI's

MEDICAL SKILLS TRAINING – CLINICAL PRECEPTOR

- Care and Intervention During Seizure
- VNS Magnet
- Documenting Seizure Episodes
- Administering Rectal Anticonvulsants
- Head-to-Toe and Segmental Height
- Height Weight and Head Circumference
- Wound Assessment and Documentation
- Wound/ Stoma Care
- Sterile Technique: Tracheal Suction
- Neurological Assessment/ Vitals
- Use of EKG / Cardiac Monitor
- Responding to STAT

- Oxygen Administration
- Ventilator Circuit Changes
- Peritoneal Dialysis Procedure
- Care of PD Catheter and Equipment
- Placement/Insertion of Gastric Tube
- Placement/Insertion of Tracheal Tube
- Chest Physiotherapy
- Administering Medications

COMPUTER SKILLS:

- Abaquis

COMMERCIAL SKILLS

- Seizure Protocol
- Identifying Change of Condition
- Identifying and Responding to Cardio-Pulmonary Distress
- Identifying, Reporting and Documenting Behavioral Issues
- Use of Restraints and Documentation
- Body Mechanics and Injury Prevention
- Preventing Resident/ Staff Falls
- Ethics and Decision Making

CONTINUOUS IMPROVEMENT

- Documentation Workshops
- Conflict Resolution
- Communication
- Leadership/ Train-the-Trainer
- Team Building and Management
- Improving CQI/ Auditing Skills
- Critical Thinking and Problem Solving
- Disaster Preparedness/ Active Shooter
- Cultural Diversity

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
Sunrise Medical (US) LLC
18-0595**

Panel Meeting Date: December 8, 2017
Regional Office: Sacramento Regional Office
Analyst Name: Karen Mam
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$237,181.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$279,036.00	N/A	\$41,855.00 (15%)	\$280,000.00

APPLICANT PROFILE

Company Summary	Sunrise Medical (US) LLC (Sunrise Medical) (www.sunrisemedical.com) manufactures and distributes manual and powered wheel chairs.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 329	US: 329	World Wide: 1,650
Turnover Rate (Applicant)	7.50 %		
Repeat Contractor	Yes		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on upgraded equipment for new wheelchair models that will be released in 2018.
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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	327	\$18.00	46	\$828	8 - 200
1	Retrainee, Temp to Permanent	10	\$18.00	46	\$828	8 - 200

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

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1985 and headquartered in Fresno, Sunrise Medical designs, manufactures and distributes high-quality mobility products including manual and powered wheel chairs. Products are sold through a network of homecare medical product dealers and distributors in over 130 countries. All training be conducted at its headquarters in Fresno.

2. Current Training Project Details

Purpose of Training	<p>This is Sunrise Medical's third ETP Agreement, and the third in the last 5 years. In the prior Agreement, training focused on integrating drive controls into select wheelchair models.</p> <p>In this Agreement, training will focus on two new wheelchair models (Series 500 and 700) set to be launched in early 2018. The launch of these new models requires two additional production lines at the Fresno facility. Sunrise Medical has invested over \$7M on new equipment including: drill presses, a Wheelabrator Steel Extraction Blast Center, and a EMH Ohio Crane System. All new equipment will support the new production lines. Employees require extensive training on product knowledge, new assembly and manufacturing processes, quality control tolerances and packaging.</p> <p>Additionally, Sunrise Medical will provide cross-training and leadership to help advance employees within the Company. Training will expand the knowledge base of its workforce and allow employees to advance within a high performance workplace.</p> <p>Although training topics are similar to those provided in the prior Agreement, trainees will not repeat the same training as previously received.</p>
Training Infrastructure and Administrative Plan	Sunrise Medical has assigned a Manager and Support Staff to oversee training coordination and all administrative duties. Training will be delivered by in-house experts.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	Sunrise Medical is a repeat contractor where payment earned within the past five years exceeded \$250,000 at their Fresno location. Therefore, Sunrise Medical will be subject to a 15% Substantial Contribution towards the cost of training for trainees in Group Number 1.

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	
All occupations will receive training in Business, Computer, Continuous Improvement and Manufacturing Skills.	

Delivery Method/Level	Productive Laboratory
Summary	
Maintenance Mechanics, Manufacturing, Production and Engineering Staff will receive Productive Lab training in Manufacturing Skills. Training will be delivered with up to a 1:3 trainer-to-trainee ratio. Some production equipment on the new lines will require 2-3 staff members to operate and training all staff simultaneously will ensure proper operation of equipment. Productive Lab training is capped at a maximum of 18 hours per trainee.	

4. Additional Company or Training Project Details

Temporary to Permanent Hiring

Ten Production Staff trainees in Group Number 1 will come under Panel guidelines for "Temporary to Permanent" employment. Sunrise Medical retains all employees through temporary agencies with the intention of hiring these workers into full-time, permanent positions after training. The average time for "converting" temporary workers into full-time permanent employment is three months and will not exceed six months. Trainees will receive health benefits after 30 days. Trainees are brought in on a temp-to-perm basis to ensure they will be able to meet all job requirements as a probation type trial period.

These trainees must be determined eligible to participate in ETP-funded training while on payroll with the temporary agency. The retention and post-retention wage requirements cannot be met until the trainees have been hired. Until then, ETP will not issue progress payments.

4.1 Program Waivers

N/A

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

Sunrise Medical has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Strategic Business Solutions, LLC	Visalia	\$8,250.00
Administrative	None selected to date	N/A	N/A
Training	To be Determined	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes Sunrise Medical performance under prior ETP contracts completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET16-0115	Fresno	08/03/15-08/02/17	\$280,350.00	\$280,350.00	100%
ET13-0425	Fresno	06/24/13-06/23/15	\$234,440.00	\$234,440.00	100%

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Best Purchasing Practices APICS/Just-in-Time
Computer Skills (Standard)	Advanced Microsoft Office Suite
	CAD/CAD 3D Software
	Computer-Assisted Machinery Software
	Litmos Learning Management System
	Oracle JDE System Upgrade
	Oracle Tale Corporation TALEO Analysis
	Sunrise Quality Control System Software
Continuous Improvement Skills	Advanced Quality Controls Systems
	Sunrise Leadership Academy Training
	Teambuilding
Manufacturing Skills (ME) (Standard)	HURCO CNC Machine Operation and Calibration
	Link It Product Knowledge and Manufacturing
	Measuring Machine Calibration and Operation
	Power Chair 500 Series Product Knowledge and Manufacturing
	Power Chair 700 Series Product Knowledge and Manufacturing
	Production Cross-Training Across Stations
	Quickie Wheelchair Product Knowledge and Manufacturing
	Switch It Product Knowledge and Manufacturing
	Water Transfer Paint Process
	Xenon Manual Wheelchair Product Knowledge and Manufacturing

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	Measuring Machine (Brown and Sharp) Calibration and Manufacturing
	Series 500 Wheelchair Manufacturing Processes
	Series 700 Wheelchair Manufacturing Processes
	Wheelchair Power Assembly Manufacturing

<i>PL Justification and Details</i>	
Explain the need for productive laboratory (PL) training	Productive lab Training is needed as Sunrise Medical rolls out new product lines to ensure that production speed can be mastered while maintaining the highest quality standards. The materials that go into the processes (titanium, etc.) are expensive and the high waste of a class/lab session would be detrimental to the Company. Productive lab will ensure real time teaching of the equipment and craftsmanship involved in producing these models.
Describe the Equipment/Processes to be used in delivering the PL training	Hurco CNC Machine Measuring Machines Mills and Presses Paint Booth and Spray Rigs Power Assembly Units
Describe Trainer Qualifications	Trainers will be certified proficient in all models and processes. They will have been trained by Sunrise Management and product vendors where needed.

Attachment 2 - Training Delivery and Curriculum Listing

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

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



**TRAINING PROPOSAL FOR
The Nevell Group, Inc.
18-0517**

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Heather Bernard
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:		\$ 77,520.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 77,520.00	N/A	\$ 0.00	\$ 155,700.00

APPLICANT PROFILE

	The Nevell Group, Inc. (NGI) is a commercial interior and exterior wall system contractor for public and private sectors.
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Industry Sector(s)	Construction		
Priority Industry	Yes		
No. Employees (Applicant)	State: 400	US: 400	World Wide: 400
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will ensure staff are current with regulatory building codes, energy efficient building standards, software updates, and will provide needed Leadership Skills for frontline staff.
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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	91	\$ 18.00	40	\$ 720	8 - 200
2	Job Creation – Retrainee Initiative Program	15	\$ 20.00	40	\$ 800	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2003, and headquartered in Brea, NGI is a commercial builder providing a full range of construction management, general contracting, design build, integrated delivery, and pre-construction services. The Company specializes in metal stud framing, drywall, acoustical ceilings, steel framing, and painting. NGI also provides professional services for new construction, modernization and tenant improvement. Customers include private developers and public entities, higher education institutions including community colleges & universities.

NGI will include its three California locations in this project: the headquarters in Brea, Concord and Carlsbad.

Although many of the Company's field staff, carpenters, plasters and tapers are represented by a union, the occupations included in the training plan are not represented by a collective bargaining agreement. All staff included in the project are frontline workers per the SET guidelines.

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

The construction industry is constantly changing and in order to provide quality services to its customers, NGI must keep its staff current with the latest trends in sustainable design, energy efficiency, emerging technology, and enhanced project delivery methods. NGI's customers have been requesting that the Company expand its scope of services to include engineering and design services, which are outside of its normal range of construction services. As such, the company must train designers, engineers, estimators, administrative and operations staff in order to keep up with demand. Training includes virtual design and construction, product knowledge, Blue Beam and other design software systems. All of the trainees will be office staff and all are frontline workers. Managers, supervisors and executive staff are not included.

Two major changes in regulatory codes have created a need for training at NGI. Proposition 51 which allocated \$9 billion in bonds to fund construction and improvement of K-12 and community college facilities has created an opportunity for NGI, but requires that its staff are up to date on the requirements of the projects. Updates to the California Building Codes for energy efficiencies require NGI to provide training to ensure staff are skilled and its projects are in compliance. These Commercial Skills training sessions will be provided to engineers, project leads, designers, estimators and foreman.

PROPOSED TRAINING PROJECT DETAILS

	<p>Additionally, the software programs the company utilizes are updated annually. As such, NGI must provide continual staff training. Training will be provided on internal construction estimating software, Plexxis, to ensure efficient data management and reduce duplicate documentation of the construction process. Training will be provided to all staff. Additionally, Computer Skills training will also be provided to all occupations and include Building Industry Management software, virtual design and Data Sharing Platform Services among others.</p> <p>NGI has identified training needs to increase efficiencies and reduce errors. Training will be provided to all occupations and will include project development/management, negotiations, cost management analysis, front line Leadership Skills, product knowledge, and effective communication. The Company will also provide Continuous Improvement training including Lean Techniques, Process Improvement, Quality Control, Zero Waste and Sustainability Practices.</p>
Training Infrastructure and Administrative Plan	All training at the Brea location will be scheduled by the human resources department in coordination with company management. The general managers at the Concord and Carlsbad locations will schedule training for their respective locations and submit training rosters to the HR staff at the headquarters in Brea. Additionally, NGI will utilize Training Funding Source to assist with administration of the project.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training will be provided to all occupations in Business Skills, Commercial Skills, Continuous Improvement and Computer Skills (See Attachment 2).	

4. Additional Company or Training Project Details

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

PROPOSED TRAINING PROJECT DETAILS

Retrainee/Job Creation

NGI is in a period of growth and expects to increase its revenue by 25% in the next two years. In order to keep up with the growth, the Company is expanding existing business capacity by adding newly-hired employees to existing functions. NGI plans to hire five engineers, five design staff, and five estimators at the HQ location in Brea. These 15 trainees will be placed into net new jobs.

Veterans

NGI currently has four Veterans on staff and will be providing them training.

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	\$ 3,900.00
Administrative	Training Funding Source	Seal Beach	Not to exceed 13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

The applicant has no previous ETP Agreements.

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Client Relations
	Communication/Conflict resolution
	Design Build Budgeting
	Presentation Skills
	Product Knowledge
	Accounting Skills
	Estimating Skills
	Job Costing Skills
	Leadership Skills
	Marketing/Business Development/Sales
	Negotiation Skills
	Project Management Skills
	Commercial Skills (Standard)
Scaffold, Signs, Signals and Barricades	
Storm Water Pollution Prevention Program	
Supplier Diversity	
Trenching/Excavation	
Underground Utility	
Change Order Procedures	
Documentation Procedures	
Energy Efficiency Building Skills	
Equipment Operations & Installation	
Estimating Skills	
Green Construction Skills	
Job Site procedures/Logistics	
Materials - Ordering, Handling and Storage	
Workflow/Work Practices	
Computer Skills (Standard)	Customer Relationship Management (CRM)
	Financial Accounting Software
	Job Management System (JMS)
	PLEXIS construction software
	Scheduling software
	Accounting/Project Management Software
	Adobe InDesign Software
	Asset Tracker Software
	Blue Beam Software
	Dashboard Software
	Electrical Bid Manager (EBM) Estimating
	Field Building Industry Management (BIM) Software
	Microsoft Office/Project - Intermediate

Attachment 2 - Training Delivery and Curriculum Listing

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

	Smartsheet Software
	Timekeeping Software
	Virtual Design /Construction Software
Continuous Improvement Skills	Goal Setting
	Lean Techniques
	Mentoring
	Performance/Process/Productivity Improvement
	Problem Solving
	Project Planning/Delivery
	Quality Control
	Sustainability
	Zero Waste
	OSHA 10/OSHA 30
	Team Building Skills
Hazardous Materials Skills	Handling Hazardous Materials
	Globally Harmonized System
	Hazardous Materials Operations



Training Proposal for:

The Technical School, Inc. dba Technical College

Agreement Number: ET18-0151

Panel Meeting of: December 8, 2017

ETP Regional Office: North Hollywood

Analyst: J. Romero

PROJECT PROFILE

Contract Attributes:	New Hire SET Multiple Barriers At-Risk Youth Priority	Industry Sector(s):	Services Healthcare Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤0%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$151,900		\$14,560 12%		\$166,460

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 At-Risk Youth Priority Rate	Commercial Skills; Other Titles (Job Readiness Skills)	35	8 - 260	0	\$4,617	\$10.60
				Weighted Avg: 217			

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.

<p>Minimum Wage by County: \$10.60 per hour for Los Angeles County</p> <p>Health Benefits: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No This is employer share of cost for healthcare premiums – medical, dental, vision.</p> <p>Used to meet the Post-Retention Wage?: <input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Maybe</p> <p>Participating employers may use health benefits to meet the Post-Retention Wage.</p>
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Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Certified Restorative Nurse Assistant		35

INTRODUCTION

Founded in 1994, The Technical School Inc. dba Technical College (Technical College) (www.technicalcollegeonline.com) is a for-profit, vocational training institution serving the Los Angeles area, offering programs in several fields of study including Nurse Assistant. The College has four campus locations in the Los Angeles area where training will occur: South Gate (Main Campus), and branch locations in Canoga Park, El Monte and Los Angeles. Technical College provides training and placement services to California Workforce Investment Boards, WorkSource and One-Stop Centers, private businesses and community organizations. The students are primarily residents of the surrounding communities from diverse backgrounds including dislocated workers, refugees, immigrants, and individuals receiving CalWorks or General Relief. This is Technical College’s fourth training proposal with ETP, and third in the last five years.

Healthcare employers are experiencing record high average daily census numbers. With this trend projected to continue, there is a need for Certified Restorative Nurse Assistants (CRNA) in the Los Angeles area. The need for CRNAs is driven by the increase in demand for care of the elderly, long-term care, and convalescent and rehabilitative medical services. Demand for skilled health workers will increase as the aging population continues to expand, and as the Affordable Care Act provides more citizens access to healthcare services.

The College seeks funding to provide critical job skills, CRNA training, to unemployed youth at risk of becoming involved in gangs and/or criminal activities.

PROJECT DETAILS

Training Plan

Commercial Skills: Training will be provided in theory and practical application skills required for employment as a CRNA. Trainees will learn to help patients achieve and maintain optimal physical activity. Trainees will learn to assist nursing staff with patients' daily living practices and personal care, as well as respond to restorative needs such as physical therapy, mobility techniques, and rehabilitation.

Job Readiness Skills: Training will be provided in the skills needed for trainees to find jobs, including interview and resume skills.

SET Multiple Barriers - At-Risk Youth

All training will be funded as Special Employment Training/Multiple Barriers under the At-Risk Youth Guidelines. Employers are not required to demonstrate out-of-state competition and trainees are exempt from standard eligibility requirements. Technical College will be responsible for documenting the eligibility criteria for this program based on special standards outlined below.

Young adults between 18 and 23 years of age may be deemed to be at-risk if they are not in school or employed full-time at the time of recruitment, and meet one or more of the following criteria:

- Previously involved in or heavily exposed to gang activities
- Homeless
- History of drug addiction
- Have child on public assistance
- Emancipated foster youth
- Physical or mental disability
- Parent is incarcerated
- High school dropout

Retention Modification

Retention may be satisfied by employment of at least 30 hours a week for at least 90 days. For occupations in which workers are hired for short-term jobs, retention may be satisfied by employment of at least 500 hours within 180 days with one or more participating employers.

Curriculum Development

Technical College's CRNA Curriculum is based on the Nurse Assistant Training and Assessment Program (212 total hours). The guidelines were developed by the Chancellor's Office of California Community Colleges, the California Health Workforce Initiative, and the Quality Care Health Foundation and approved by the California Department of Public Health. The Curriculum is regularly reviewed by a board (Executive Director, Chief Academic Officer, Director of Nursing Programs, hospital administrators, instructors and student representatives) to ensure training is comprehensive and incorporates current methods and standards of the healthcare industry. The

Curriculum consists of 180 hours for State CNA Certification, 16 hours for CRNA Certification, and an additional 16 hours of Job Readiness training.

Training Infrastructure

Training will be provided by qualified instructors with a minimum of three years of field experience. All Nursing Department instructors are Licensed Vocational Nurses and are supervised by a Registered Nurse who serves as the Director of Nursing Programs. All instructional activities are overseen by the Chief Academic Officer.

Technical College will administer this ETP project under the supervision of its Executive Director. Four full-time Workforce Development Specialists will be responsible for assessing participants' eligibility and training needs, scheduling training, and coordinating job placement.

Impact/Outcome

The existing job market for CRNAs limits the starting wage of applicants with no experience. As individuals gain experience and increase efficiency, wages may increase. CRNAs may also be able to promote up the career ladder. Employer-based training beyond this proposal, as well as certifications in areas such as Alzheimer's & Dementia, Sub-Acute care and Respiratory Care, can create additional opportunities for advancement and future wage gains.

Successful participants will receive certification as a Nurse Assistant from the California Department of Public Health, and certification as a Restorative Nurse Assistant authorized by the Quality Care Health Foundation (QCHF). The QCHF is the educational arm of California Association of Health Facilities created to provide quality training and resource materials to individuals working in long-term care throughout California. The added CRNA certification will assure higher wages, improved work environment, and the first step on the career ladder.

This will prepare participants to meet state requirements for employment in the field, and deliver skills that will lead to placement with companies that provide secure, long-term employment. ETP reimbursement is contingent upon receiving a certification and employment as a CRNA.

Marketing and Support Costs

Technical College's marketing program consists primarily of referrals by the EDD, Los Angeles County Department of Social Services, Los Angeles County Office of Education, WorkSource centers, America's Job Centers of California, religious and community organizations, extended care facilities, skilled nursing care centers, and convalescent hospitals. The College recruits prospective students using a combination of resources including a peer referral system, fliers, brochures, and catalogs. Workforce Development Specialists actively participate in outreach programs through various community organizations and events. Technical College has an existing network of over 530 employers that actively hire nursing graduates. These employers operate licensed skilled nursing facilities, long term care facilities, convalescent hospitals, nursing homes, and assisted living facilities.

The At-Risk Youth Guidelines allow Support Costs of up to 12% for trainee/employer recruitment, eligibility assessment, and job placement. Staff recommends 12% Support Costs.

Training Agency Certification

Technical College is certified by the Bureau of Private Postsecondary Education.

Tuition Reimbursement

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

RECOMMENDATION

Staff recommends approval of this proposal.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0369	\$116,175	3/1/16 – 2/28/18	27	27	15

Based on ETP Systems, 5,874 reimbursable hours have been tracked for potential earnings of \$117,480 (101% of approved amount).

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET14-0121	Los Angeles	09/03/13 – 09/02/15	\$65,058	\$64,706 (99%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

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

8 - 260

Trainees may receive any of the following:

COMMERCIAL SKILLS**Certified Restorative Nurse Assistant**

- Rules, Roles, Responsibilities and Requirements of a Nurse Assistant
- Patients' Rights
- Interpersonal Skills
- Prevention and Management of Catastrophe and Unusual Occurrences
- Body Mechanics
- Medical and Surgical Asepsis
- Weights and Measures
- Patient Care Skills
- Patient Care Procedures
- Vital Signs
- Nutrition
- Emergency Procedures
- Long-Term Care Patient
- Rehabilitative Nursing
- Observing Charting
- Death and Dying
- Professional Development
- Leadership and Teamwork
- Medical Overview: Anatomy and Physiology
- Dysphagia and eating; Joint mobility; Functional Mobility
- Principles of Education for Nurse Assistants

JOB READINESS SKILLS

- Interviewing Skills
- Employment Applications
- Workplace Etiquette
- Pre-Employment Examinations

Note: Reimbursement for new hire training is capped at 260 total training hours per trainee, regardless of the method of delivery.



**TRAINING PROPOSAL FOR
Zuckerman Family Farms, Inc.
17-0918**

Panel Meeting Date: 12/08/2017
Regional Office: Sacramento Regional Office
Analyst Name: Cristina Kaiser
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 112,906.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 112,906.00	N/A	\$ 0.00	\$ 150,000.00

APPLICANT PROFILE

Company Summary	Zuckerman Family Farms, Inc. (ZFF) is a fourth-generation family owned farm located in Stockton that specializes in the farming of potatoes.
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Industry Sector(s)	Agriculture
Priority Industry	Yes
No. Employees (Applicant)	State: 115 US: 115 World Wide: 115
Turnover Rate (Applicant)	2.00 %
Repeat Contractor	No
High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	ZFF's training plan will focus on improving growing techniques to improve crop yields as well as cross-training staff on all crops to improve knowledge and productivity. Also, Leadership and Time Management skills training will be provided for Supervisors.
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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	101	\$ 18.00	57	\$ 1026	8 - 200
2	Job Creation – Retrainee Initiative Program	8	\$ 20.00	58	\$ 1160	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

ZFF seeks ETP funding for retraining. The Company was founded in 2006 and is headquartered at its sole facility in Stockton.

ZFF farms and distributes over 1 million packages of fresh market potatoes annually to customers in the United States and Internationally. The Company also grows and harvests wine grapes, almonds, corn, and tomatoes. Customers include large retailers such as Costco and Safeway, as well as producers of end products such as wine, tomato sauces, and corn feed.

This will be ZFF's first ETP Agreement; however, its co-located sister company, Zuckerman-Heritage, currently holds an active ETP Agreement.

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>Purpose of Training</p> <p>Training will focus on how to grow, maintain, and harvest crops and managing and maximizing crop quality and yield. Training will be provided on the operation and maintenance of farm equipment and tools. Training will also be provided on improving process prior to harvesting, including: gestation length, irrigation, soil type, pesticide treatments, and fertilizing.</p> <p>Year-round training will provide trainees with cross-training on each of the crops production processes, each with unique growing and harvesting process.</p> <p>In addition to the improvement of production efficiencies, training will also focus on customer service, communication, leadership, and time management to foster better relationships with external customers and internal staff.</p> <p>Job Creation</p> <p>ETP provides incentives to companies that commit to hiring net new employees. To be eligible for reimbursement, trainees must have been hired within the three-month period prior to Panel approval or during the term of the Agreement. ZFF has committed to hiring an additional 8 net new employees (Group 2). The Company is expanding its crops, resulting in a need for additional staff. New hires</p>
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PROPOSED TRAINING PROJECT DETAILS

	will be placed into the Farm Field, Maintenance, and Packing occupations.
Training Infrastructure and Administrative Plan	<p>ETP funds will not displace the existing financial commitment to training. The Company's annual training budget is approximately \$75,000 for new employee orientation, safety training, coaching, and new-hire training. Safety training is provided in accordance with all pertinent requirements under state and federal law.</p> <p>ZFF has designated their CEO and support staff to oversee the administration and implementation of training. Staff have ETP experience as they are administering an ETP project for their sister company (Zuckerman-Heritage [17-0300]). Management from each department has developed an individualized training plan for their section, which will be implemented upon approval of ETP funding. Training will be performed by in-house subject matter experts.</p> <p>In addition, ZFF has retained Propel Consulting Group to assist with administrative duties associated with this agreement.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1 will receive training applicable to their jobs in Business Skills, Commercial Skills, Hazardous Materials Skills, OSHA 10/30, Literacy Skills and Management Skills as listed under Attachment 2.	

4. Additional Company or Training Project Details

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

4.1 Program Waivers

No waivers have been applied to this proposed project.

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Propel Consulting Group	El Dorado Hills	\$ 7,500.00
Administrative	Propel Consulting Group	El Dorado Hills	Not to exceed 13% of funding earned
Training	N/A	N/A	N/A

4.3 Previous ETP Project Summary

The applicant has no previous ETP contracts.

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Communication Skills
	Customer Service
	Inventory Control
	Product Knowledge
	Project Management
	Teamwork
	Problem Solving
Commercial Skills (Standard)	Crop Planting Techniques
	Disk/Plow Equipment Operation
	Equipment Repair
	Fertilization Techniques
	Food Safety
	Forklift Operation
	Harvest Techniques
	Irrigation Techniques
	Operating Ditchers
	Operating Fertilizer Spreaders/Tenders
	OSHA 10
	OSHA 30
	Pesticide Applications
	Processing Shed Maintenance
	Processing Techniques
	Processing/Packing Equipment Operation
	Quality Analysis
	Tool Operation
	Tractor Operation
	Varietal Testing
Yield Analysis	
Hazardous Materials Skills	Applying Fertilizer & Pesticides
	Handling Fertilizer & Pesticides
	Storing Fertilizer & Pesticides
Literacy Skills	Basic Math
	English - Reading & Comprehension
	English - Writing
Management Skills	Leadership Skills
	Time Management



**TRAINING PROPOSAL FOR
Chevron Global Downstream LLC
17-0748**

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Margarita Paccereilli
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 744,732.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 744,732.00	N/A	\$ 0.00	\$ 2,464,000.00

APPLICANT PROFILE

	Chevron Global Downstream LLC (Chevron) is a producer of transportation fuels such as gasoline, jet and diesel fuel.
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Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	State: 8,303 US: 22,744 World Wide: 51,345
Turnover Rate (Applicant)	2.92 %
Repeat Contractor	Yes
High Unemployment Area	No
Union(s)	United Steelworkers / Local 675

TRAINING PROFILE

Training Objective(s)	As a global energy company in an intensely competitive marketplace, Chevron must have a technical workforce skilled across many platforms and different types of technologies.
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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	302	\$ 18.00	137	\$ 2466	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1911, Chevron is the second-largest integrated energy company in the United States, with subsidiaries that conduct business around the globe. Its success is driven by the ingenuity and commitment of approximately 60,000 employees who operate across the energy spectrum.

Chevron is engaged in the production and transport of crude oil and natural gas; refinery and distribution of transportation fuels and other energy products; manufacturer of petrochemical products; producer of geothermal energy; provider of energy-efficiency solutions; and development and commercialization of energy resources of the future, including biofuels and other renewables. The Company provides fuel to retail, commercial, industrial and marine customers worldwide.

The proposed training will be provided in its El Segundo refinery. This was the second refinery built by the Standard Oil Company, which later became Chevron, in California. This is Chevron's tenth ETP project. Chevron has not had an ETP Contract within the last five years.

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>Chevron must adapt to the trends and changes occurring both within the industry and the refinery. Training will equip workers with the requisite enhanced job skills to operate the centralized control room; increase the competency of workers to reduce the consequences of unplanned events; and replace existing equipment at the refinery to reduce air emissions, increase energy efficiency, improve equipment and process reliability, and provide for greater safety.</p> <p>Chevron is attempting to move away from using external contractors, taking on more roles in-house. The Company must train its employees to perform tasks historically done by various vendors. This will help Chevron retain high skilled jobs within the refinery, develop new advanced technology positions, and become competitive in a challenging economic environment.</p> <p>Chevron is also moving to a new console operations system (Honeywell to Experian). This software and hardware runs the entire refinery. All of those systems are changing.</p> <p>Training will include an average of 175 hours for Console Operators and Mechanics who will be hired during the contract term. These are new-hire replacements who will receive eight continuous weeks of initial training (320 hours). ETP will fund up to a maximum hours of 200. (After the initial training, Contractor will continue to provide additional training for the first three years. Chevron has a 3-year</p>
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PROPOSED TRAINING PROJECT DETAILS

	training program for operators, with phase gates at the end of each year). As part of the initial training, Chevron created several simulators for each plant in the refinery to be used for the proposed training. Other occupations will receive fewer hours for refresher and/or updated training.
Training Infrastructure and Administrative Plan	Chevron's L&D Supervisor will oversee training and project administration. Training will be provided by in-house subject matter experts. The Company has a well-established training platform and internal administrative procedures using a Learning Management System (LMS) that provides standardization, enrollment, training, and tracking services. In addition, Chevron has retained an administrative consultant to ensure that all training records meet ETP compliance. Chevron's current annual training budget in California is \$7.5M.
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 Computer Skills, Continuous Improvement, and Manufacturing Skills.</p> <p>Advanced Technology training will be offered to Console Operators who must have the most advanced technical skills in understanding the operations consoles used across the refinery. AT will be delivered in highly technical learning environments, including a simulations center and training labs. The costs for delivering AT training range from \$3,000 to \$5,000 per day, plus hardware, software, and setup costs. Classes will be configured to simulate real-world scenarios. Additional software licensing was purchased so trainees can have as much simulated lab/hands-on training time as possible. The trainer-to-trainee ratio is 1:1 or 1:2 to allow for in-depth coverage and personal attention from the instructor. As process control technology becomes more automated, there is less opportunity for the operators to manipulate controllers. They do not get as much hands-on experience because the control strategies can now be incorporated into the computers. Chevron must prepare for any situation where its operators may need to safely handle plant variables without computer control assistance. It is investing in training simulators to address that gap that has been created by technology. Trainers will use real time plant process simulation scenarios to prepare trainees for any potential process conditions. Simulations replicate standard operating situations as well as emergency scenarios.</p>	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
All occupations will receive Computer-Based Training in Hazardous Materials Skills.	

4. Additional Company or Training Project Details

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

ELECTRONIC RECORDKEEPING

Chevron will use its Learning Management System to document training. Staff has reviewed and approved the system.

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	California Manufacturers	Sacramento	\$ 15,000.00
Administrative	California Manufacturers	Sacramento	13% of Earned Funds
Training	N/A	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes the active performance under the ETP contract. Chevron has not had an ETP Contract within the last 5 years.

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	
Computer Skills (Standard)	Intermediate Microsoft Office	
Continuous Improvement Skills	Communication Styles	
	Development Workshops	
	Human Performance	
	Mentor Skills Training	
	Time Management	
Manufacturing Skills (ME) (Advanced Technology)	Plant Simulator Training	
Manufacturing Skills (ME) (Standard)	Analyzer Training	
	DE Advanced CTU	
	Design Engineering Fundamentals	
	Electrical Training	
	Equipment and Process Modules	
	I&E Engineering Fundamentals	
	Instrumentation Training	
	Introduction to Global Manufacturing Equipment	
	Introduction to Global Manufacturing Fundamentals	
	Introduction to Global Manufacturing Technology	
	Machinist Training	
	Metals Training	
	Operation training modules	
	PE Advanced CTU - Distillation and HEX	
	PE Advanced CTU-Hydraulics, Pumps and Heaters	
	Process Engineering	
	Process Equipment Fundamentals	
Project Exercise for Manufacturing		

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Hazardous Materials Skills	Coker/Sulfic Acid	13.00
	Control of Hazardous Energy	1.00
	Emergency Action Plan	1.00
	Fatigue Risk Management	1.00
	Fluid Catalytic Conveerr/Alkylation	9.00
	Instrumentation	1.00
	Isomax	10.00
	Low Sulfur Fuel Oil	12.00
	Safety Orientation Modules 1-4	6.00



LOCAL 675
Philip Baker
President
David Campbell
Secretary-Treasurer

June 21, 2017

Mr. Stewart Knox
Executive Director
Employment Training Panel
1100 J Street, 4th Floor
Sacramento, CA 95814

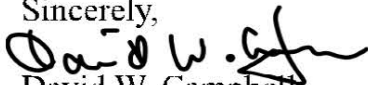
Dear Mr. Knox,

I am writing on behalf of the United Steelworkers International Union Local 675, which represents proprietary hourly employees at the Chevron El Segundo Refinery.

We support the proposal being submitted to the Employment Training Panel from Chevron Products Company for its El Segundo, California refinery.

This application has been jointly developed by labor and management and will assist Chevron's El Segundo refinery in meeting the identified individual and group development goals. We believe the proposed training will assist our union members and the other USW – represented workers in developing new skills and abilities.

Sincerely,



David W. Campbell

Cc: Mr. Henry Kusch, Refinery Manager, First Class U.S. Mail
Mr. Robert LaVenture, USW District 12 Director (email)
Mr. Willie Martinez, HR, Labor Relations (email)
Mr. Robert Taylor, USW Unit Chair
Ms. Victoria Stage, Chevron L&D

United Steel, Paper and Forestry, Rubber, Manufacturing, Energy, Allied Industrial and Service Workers International
Union - USW Local 675

Phone 310-522-2277

1200 E. 220th Street, Carson, CA 90745 fax 310-835-9324





**TRAINING PROPOSAL FOR
CU Direct Corporation
17-0921**

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Monique Webb
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 339,600.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 339,600.00	N/A	\$ 0.00	\$ 2,180,455.00

APPLICANT PROFILE

Company Summary	CU Direct Corporation, (CU Direct) provides credit unions with products and solutions for lending. Products and services include lending platforms, analytics and reporting, and auto-buying tools.
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Industry Sector(s)	Information		
Priority Industry	Yes		
No. Employees (Applicant)	State: 261	US: 410	World Wide: 410
Turnover Rate (Applicant)	6.70 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	To support growth, CU Direct is expanding its headquarters and hiring more employees. The Company must also ensure that products developed are efficient, current, and relevant to customer needs.
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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	244	\$ 18.00	50	\$ 900	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	60	\$ 20.00	100	\$ 2000	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1994 and headquartered in Ontario, CU Direct (www.cudirect.com) offers software solutions for credit unions and automobile dealers. Products include Credit Union Lending Solutions System (CUDL), the industry's number one auto lending network with over 1,100 lenders; Lending 360 Loan Origination System; AutoPremier; AutoSMART; Lending Insights (analytic tools); and Intuvo Solutions (marketing automation).

Training will be provided at four CU Direct locations in Ontario, Irvine, Rancho Cordova, and Scotts Valley. The proposal will also include an affiliated company, Intuvo, LLC (Scotts Valley location). This will be the Company's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>To remain competitive, CU Direct must continue to improve functions and services offered through CUDL such as digital shopping tools, pre-approved financing, and other options that are provided to customers when utilizing indirect lending solutions. Training will focus on areas that will improve sales and customer service skills. Training topics will include Best Practices Training, Product Management, Cisco Spark Training, Sales Training, Angular Fundamentals, Leadership Skills, and Computer Skills Training (AutoSMART, CUDL, SCRUM).</p> <p>Additionally, CU Direct will be upgrading its products. The upgrade will ensure that products developed are efficient, current, and relevant to customer needs. Training will focus on product knowledge to improve staff skills to better assist customers and enable staff to identify customers' business needs to offer the best product solution.</p>
Training Infrastructure and Administrative Plan	<p>The Senior Manager of Training has been assigned to administer this Agreement and will utilize the Company's Learning Management System to track training over the duration of the Agreement. ETP Staff has reviewed and approved the use of a LMS for recordkeeping. Also, PricewaterhouseCoopers, LLP was retained to perform administrative duties such as enrollment, data entry, tracking training hours, and payment process.</p> <p>Training will be delivered by in-house subject-matter experts and, if necessary, vendors. Training will be delivered through E-Learning, Computer-Based Training, and Class/Lab.</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

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	
Engineers, Managers, IT Staff, Finance Staff, Customer Service, Administrative and Human Resource Staff, and Sales/Marketing Staff will receive Business Skills, Continuous Improvement, and Computer Skills training as detailed in Attachment 2. Managers will also receive Management Skills training.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
Engineers, Managers, IT, Finance, Customer Service, and Sales Staff will receive Computer-Based Training. CBT hours are capped at 50% of total training hours per-trainee.	

4. Additional Company or Training Project Details

Retrainee – Job Creation

CU Direct is growing and will be expanding its headquarters. For this, the Company has committed to hiring 60 new employees (Group 2). Newly hired workers will receive training on all CU Direct products, as well as daily job skills. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	PricewaterhouseCooper, LLP (PWC)	Los Angeles	\$20,000
Administrative	PWC	Los Angeles	Not to exceed 13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

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	Client Experience Training
	Lending 360
	Lending Insights
	New Hire Job Skills Training
	New Product Releases
	Product Manager Training
Computer Skills (Advanced Technology)	Agile
	Pluralsight Live Training
	SCRUM
Computer Skills (Standard)	AutoSMART Release
	Cisco Spark Training
	CUDL Release
	HubSpot Academy Teachings
	Pluralsight Learnings Teachings
	Product Management
Continuous Improvement Skills	Best Practice Trainings - Process Improvement
	LSS Executive Training
	On the Job Training
	Sales Ops
	Salesforce
Management Skills	Managerial Effectiveness

<i>Delivery Method /Level</i>	<i>E-Learning – Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	Advertising Foundations	1.50
	Business Writing Strategies	2.00
Computer Skills	After Effects Apprentice	2.00
	Angular Fundamentals	10.00
	C# Fundamentals with Visual Studio 2015	5.50
	Deploying .NET Applications with Octopus Deploy	2.00
	Ethical Hacking: Understanding Ethical Hacking	7.00
	Illustrator CS6	8.80
	Mastering Git	2.50
	PowerShell v3/v4 Essentials for IT Admins Part 1	4.50
	PowerShell v3/v4 Essentials for IT Admins Part 2	5.00
	Programming Foundations	4.80
	Quick Start to JavaScript: Volume 1	2.00
	The Case for PowerShell	1.50
Visual Studio Code	4.00	

Attachment 2 - Training Delivery and Curriculum Listing

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

Continuous Improvement Skills	5 Ways to Control Your Time	1.50
	Emotional IQ	2.00
	Enhancing Your Productivity	1.80
	Giving Constructive Feedback to Your Coworkers	1.50
	Managing Change	2.50
Management Skills	Are You A Manager Or A Leader?	1.50
	Becoming a Visionary Leader	1.50
Other	Acceptable Use Policy Training	1.00
	Accessing and Utilizing Internal Forms	1.00
	AutoCount Training	1.00
	CECL Product Line	1.50
	CEM System Training	1.00
	Concur Expense Reporting	1.00
	Credit Union Direct Funding	1.00
	CU Direct Compass Overview	0.50
	CU Direct Overview	0.50
	CUDL Engage	1.00
	CUDL Payoff Solutions	2.50
	Dealer 101	3.00
	Dealer 201	3.00
	Dealer Performance & Dealer Management Network	2.00
	Decision Manager Training Series	6.00
	DMS Integration	1.00
	Halogen Performance Management Software	1.50
	Office Ergonomics	0.50
	Payroll (ADP) Training	1.00
	Safety Training	1.00
	Salesforce Training	3.00
	Security Awareness Training	1.00
	Submitting HelpDesk Tickets in JIRA	0.50
WebEx Training	1.00	



**TRAINING PROPOSAL FOR
P2S Engineers, Inc.
18-0541**

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Monique Webb
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 290,520.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 290,520.00	N/A	\$ 0.00	\$ 556,454.00

APPLICANT PROFILE

Company Summary	P2S Engineering, Inc. (P2S) is a consulting, engineering, and commissioning company that provides services in construction planning and design and project management.
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Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	Yes		
No. Employees (Applicant)	State: 178	US: 178	World Wide: 178
Turnover Rate (Applicant)	1.67 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	To remain competitive, P2S must ensure staff is current on the latest technologies, software programs, and California Building Standard Codes. Training will allow staff to be more effective at their jobs.
------------------------------	--

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	164	\$ 18.00	60	\$ 1080	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	90	\$ 20.00	63	\$ 1260	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1991 and headquartered in Long Beach, P2S provides consulting, design, and engineering services in the electrical, mechanical, plumbing, control systems, telecommunications, building commissioning, and industrial security industries. Customers include the Ports of Long Beach & Los Angeles, NBC Universal, Paramount Pictures, Disneyland, Salk Institute, Siemens, Verizon, Applied Medical Research, Boeing, Aerospace Corporation, 3M Pharmaceuticals and local governments.

2. Current Training Project Details

Purpose of Training	<p>This will be the Company's fifth ETP Agreement, the fourth in the last five years. Training in this proposal will focus on new employees and updated technologies. Some courses from the previous Curriculum are included in this proposal. However, these courses will be delivered to new employees and/or include updated technologies. Training will not be duplicated.</p> <p>In the last three years, P2S has grown substantially, from 84 to 170 employees. The Company recently expanded into Northern California, opening a San Jose office in the 3rd quarter. An increase in business demand has afforded P2S the opportunity to continue hiring to increase the number of projects they can procure as well as meet high customer demand. By the end of 2018, P2S estimates a workforce of approximately 300 employees. For this proposal, the Company will be hiring and training 90 new employees. Training will ensure these workers are up-to-date on standards, codes, and industry practices. This growth also presents new challenges, as the Company expands services to new industries. The Company must train on standards, codes and practices of these industries to instill knowledge and capabilities needed to successfully serve clients.</p> <p>Additionally, to remain competitive with larger in-state and out-of-state engineering companies, P2S must keep up with technology. Many of the software systems the Company uses are outdated. For example, the Company must update 3-D software programs that streamline the engineering design process using a single model, improving communication, evaluation and cooperation with construction teams and customers. Advanced Technology training will be delivered to Engineers and Designers to learn new software program functions such as BIM (Building Information Modeling) and REVIT Mechanical, Electrical, and Plumbing (MEP). These systems make it easier for employees to coordinate with building project contributors.</p>
Training Infrastructure and Administrative Plan	P2S has designated in-house Personnel Staff familiar with the ETP program to schedule and track training. The Company has retained Training Funding Source to assist with admin services.
Marketing Plan (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Trainees will receive Business, Commercial, and Computer Skills training delivered through Class/Lab as shown in detail in Attachment 2.	

4. Additional Company or Training Project Details

Retrainee – Job Creation

Due to recent expansions and the opening of the new location in San Jose, P2S must hire 90 new employees (Group 2). Training will ensure workers can perform job tasks proficiently. 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.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$ 4,900.00
Administrative	Training Funding Source	Seal Beach	Not to exceed 13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

The table below summarizes the active performance under the ETP contract.

Active Contract(s) Elements	Summary
Contract Number	ET16-0374
Purpose of Training	Train employees on Construction Management, a division created to expand contract administration services, maintain plans, and review designs. The Company also hired and trained a total of 30 employees.
Location(s)	Long Beach, San Diego
Term	03/07/16-03/06/18
Approved Amount	\$105,960
Projected Earnings	\$105,960
Performance Percentage	100%
Trainee Details	Based on ETP Systems, 5,716 reimbursable hours have been tracked for potential earnings of \$105,960 (100% of approved amount). All training has been completed under this Agreement. Final earnings for 126 trainees (\$99,414) are in the process of ETP review. The remaining funds will be used when the final 15 trainees finish retention in December 2017.

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET15-0168	Long Beach	07/07/14- 07/06/16	\$106,548	\$106,548	100%
ET12-0446	Long Beach	06/30/12- 06/29/14	\$99,840	\$99,840	100%

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Administrative Processes
	Business Development/Sales
	Client Relationships
	Communication
	Financial Management
	Leadership
	Risk Assessment/Management
	Time Management
Commercial Skills (Standard)	Acute Care Design
	Commissioning
	Energy Systems
	Engineering Mechanical, Electrical, Plumbing (MEP)
	Infection Control
	Leadership Energy Environmental Design (LEED)
	Office of Statewide Health Planning and Development (OSHPD) Standards
	Power System
	Sustainable Building MEP Design
	Job-Site Procedures
	OSHA 10 & 30
Computer Skills (Advanced Technology)	AutoCAD
	Building Information Modeling (BIM)
	REVIT Mechanical, Electrical, and Plumbing (MEP)
Computer Skills (Standard)	Computer Operations
	Customer Relationship Management
	Financial Accounting
	MS Office
	Project Management
Continuous Improvement Skills	Process /Quality Improvement
	Meeting Effectiveness



TRAINING PROPOSAL FOR
The Cheesecake Factory Bakery Incorporated
18-0610

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Margarita Paccereilli
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 504,000.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 504,000.00	N/A	\$ 0.00	\$ 2,000,000.00

APPLICANT PROFILE

Company Summary	The Cheesecake Factory Bakery Incorporated (CFB) is a food producer specializing in cheesecakes, cakes, and assorted desserts that are distributed to restaurants, club stores, food distributors, retail stores, and the military.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 7,585	US: 37,249	World Wide: 37,249
Turnover Rate (Applicant)	18.00 %		
Repeat Contractor	Yes		
High Unemployment Area	No		

Union(s)	N/A
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TRAINING PROFILE

Training Objective(s)	Training will provide bakery staff with skills to operate new and upgraded equipment.
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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	350	\$ 18.00	80	\$ 1440	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

CFB started as a family bakery in Detroit in the 1940's, supplying cakes to local restaurants. In 1972, the bakery moved to Los Angeles. Two years later, over 20 cheesecakes and other dessert assortments were being sold to hundreds of wholesale accounts, expanding CFB's distribution from Santa Barbara to San Diego.

In 1978, CFB opened its first restaurant in Beverly Hills, offering guests a high-scale dining experience. Today there are over 200 restaurants around the world. CFB opened two baking facilities, one in Calabasas Hills and another one in North Carolina, to serve its restaurants, as well as its national and international retail accounts in the Middle East, China, Canada, and Mexico.

2. Current Training Project Details

Purpose of Training

This will be CFB's third ETP Contract, the third in the last five years. The previous contract focused on training in various manufacturing and continuous improvement in its Corporate Headquarters and a newly-opened restaurant in Valencia. This proposal will only focus on the bakery/food manufacturing location only (Calabasas Hills).

CFB has invested \$16M to upgrade its baking facility with new equipment. This new equipment will change the entire manufacturing process and require workers be trained in programming, maintenance, troubleshooting, and setup. Some of the training on the new equipment was originally planned for the prior contract. However, training was delayed due to permitting issues. All permits have been obtained and the new equipment is scheduled to be installed in February 2018 (Machinery training was not included in purchase costs).

- 1) New Oven System will feature a continuous flow of production conveyor belts to replace the current system that relies on individual racks being moved from separate ovens.
- 2) Tonelli Cream System eliminates the need for production staff to make smaller batches of whipped cream and fillings for transport from freezer mixing areas to various areas of the plant. Staff can now digitally mix batches and have them stored and pumped into areas as needed.
- 3) Steam Kettles are used to mix two or more ingredients that must be heated at a controlled temperature (e.g. caramel, chocolate, etc.).

PROPOSED TRAINING PROJECT DETAILS

	<p>4) New Mettler Toledo Checkweigher & Metal Detector combo weighs final products before they are sent to packaging and scans products for metal debris.</p> <p>5) New Cooling System will replace its current Freon cooling system.</p>
Training Infrastructure and Administrative Plan	<p>During the installation of new equipment, the baking facility will shut down for approximately four months. CFB will use the downtime to train employees. A detailed training schedule is currently in place and has been provided to ETP.</p> <p>CFB's Director of Human Resources, the Training Manager, and Human Resource Representative will oversee training and project administration. These staff are knowledgeable of the ETP program having participated in administering the Company's previous ETP projects.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Class/Lab training in Business, Computer, Literacy, and Manufacturing Skills topics listed in Attachment 2.	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

The table below summarizes the active performance under the ETP contract.

Active Contract(s) Elements	Summary
Contract Number	ET16-0277
Purpose of Training	Training aimed to improve employee skills training in various manufacturing areas. Also, the Company provided Continuous Improvement in its Corporate Headquarters and newly-opened restaurants in California.
Location(s)	Calabasas, Agoura Hills, Valencia
Term	12/31/2015 – 12/30/2017
Approved Amount	\$ 243,700
Projected Earnings	\$ 171,690
Performance Percentage	70%
Trainee Details	530
Other Notes	<p>Training ended on 9/30/17. Although CFB originally intended to deliver 100% of the training in this Agreement, some training were postponed due to delay in obtaining permits for the facility upgrades which will be the focus of the new proposal.</p> <p>Based on the ETP Systems, 9,190 reimbursable hours have been tracked with projected earnings of \$171,690 (70% of approved amount). CFB will be submitting a Final Closeout Invoice by 12/30/17 when all trainee retentions have been completed.</p>

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET13-0347	Calabasas Hills	04/05/2013- 04/04/2015	\$76,500	\$76,500	100%

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	7 Habits
	Accounting
	Coaching
	Communication
	Leadership
	Motivation
	Presentation Skills
	Project Management
	Respectful Teamwork
	Supervisory Skills
	Team Building
	Time Management
Computer Skills (Standard)	Business Objects
	Kronos
	MS Office (Intermediate and Advanced)
	Ross
	Storyline
	Taleo
	Technical Services
Video/Audio Editing Software	
Literacy Skills	Vocational English as a Second Language (VESL)
Manufacturing Skills (ME) (Standard)	Baker's Math
	Equipment Operations
	Food Safety
	Good Manufacturing Practices
	Machine Maintenance
	Production Skills
	Quality Assurance (Lab and Floor)
	Research & Development
	Sanitation
Scale Up from Test Runs	



TRAINING PROPOSAL FOR
CareMeridian, LLC
17-0601

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Kellen Hernandez
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:		\$281,200.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$281,200.00	N/A	\$0.00	\$425,520.00

APPLICANT PROFILE

Company Summary	CareMeridian, LLC (CareMeridian) operates specialty skilled nursing and rehab centers throughout California, Nevada, Utah, Arizona and Colorado. The Company provides post-acute care (occupational, speech, and respiratory therapy) to patients with medically complex injuries including traumatic brain and spinal cord injuries.
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Industry Sector(s)	Healthcare		
Priority Industry	Yes		
No. Employees (Applicant)	State: 529	US: 1350	World Wide: 1350
Turnover Rate (Applicant)	4.69 %		
Repeat Contractor	No		

High Unemployment Area	Yes
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will focus on Medical and Commercial Skills for nursing staff, and Business skills for support staff. Training will enable staff to become highly skilled with medical equipment and provide the level of care needed to treat patients with complex neurological and spinal cord injuries.
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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	211	\$18.00	60	\$1,080	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	31	\$20.00	86	\$1,720	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1989 and headquartered in Irvine, CareMeridian serves high-acuity patients who require advanced medical skills to treat and rehabilitate them. The Company's goal is to help patients of all ages with brain, spinal cord and other catastrophic injuries achieve the highest quality of life possible. CareMeridian does this by delivering personalized, complex nursing and rehabilitation services in a non-institutional environment with 1:4 staff-patient ratios and 1:1 staff-patient ratio for therapy. The Company offers a distinctive service delivery model, merging experienced and skilled health care and rehabilitation teams with community-based facilities designed to meet the unique needs of those patients they serve at every stage of recovery. CareMeridian operates 27 facilities in California and all 27 facilities will participate in this project.

This will be CareMeridian's first ETP Agreement.

2. Current Training Project Details

Purpose of Training

The demand for high-acuity nursing continues to grow as new medical equipment and technology is created that allow for this patient population to receive advanced healthcare services. To keep pace with demand, CareMeridian must train its staff in the advanced skills required to use new medical equipment and technology for the treatment of high-acuity patients. This includes a high-acuity patient Information Technology system used for clinical diagnosis and complex medical equipment including ventilators, bladder scanners and tracheostomy equipment.

The skills required to implement and use new medical equipment and technology is not taught in traditional hospitals or nursing programs. Therefore, CareMeridian must continue to provide advanced medical skills training to its RNs, LVNs and CNAs in the skills necessary to operate new medical equipment and learn how to best utilize new technology to enhance their existing medical training and knowledge.

Training will allow the Company to efficiently utilize new medical equipment and to successfully enhance processes into its nursing model with the goal to help patients achieve the highest quality of life possible.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	The Company's HR department and the ETP Project Coordinator Director will oversee all training. The HR Director and the Director of Nursing will coordinate with the administrative assistant at each participating location. Each facility administrative assistant will oversee attendance roster documentation. Training will be delivered by in-house experts and vendors as needed.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training applicable to their jobs in Business, Commercial Skills and Medical Skills (didactic) topics.	

Delivery Method/Level	Productive Laboratory
Summary	
Nursing Staff occupations will receive training applicable to their jobs in Medical Skills (preceptor) topics. Training will be delivered by expert in-house trainers or highly skilled and qualified training vendors.	

4. Additional Company or Training Project Details

4.1 Program Waivers

Job Creation

CareMeridian is experiencing increased demand for services. The Company is executing a strategic expansion plan for three to six additional beds in its existing facilities and will open at least three new facilities by the 4th quarter of 2017. With this expansion, the Company must hire additional medical staff to support this growth patient population.

4.2 Program Waivers

N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Subcontractor Summary

N/A

4.4 Previous ETP Project Summary

N/A

4.5 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Case Management
	Daily Activities Management
	Dietary Assessment and Plans
	Facility Management
	Human Resources
	Medical Records
	Organization Skills
	Patient Admission
	Performance Management
	Pre-Admission
	Waste Management
Commercial Skills (Standard)	Electrical Skills
	Equipment Operation Training
	Equipment Safety Training
	Hot Water Systems
	Mechanical Lifts
	Medical Equipment Training
	Plumbing Skills
	Site Management
Medical Skills (didactic)	Auditing
	Control Plans and Reporting
	DNR Identification
	Isolation Techniques
	Monthly Line Listing
	Requests
	Set-Up
	Thinning, Storage, Retrieval

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Medical Skills (preceptor)	Abnormals to Report
	Active
	Age-Specific & Cultural Competencies
	Anticoagulation Management
	ASIA Levels
	Aspiration Precautions
	Assessment
	Assistive Devices
	Autonomic Dysreflexia and Protocol
	Bathing

Attachment 2 - Training Delivery and Curriculum Listing

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

Behavioral Issues
Blood Pressure
Body Alignment
Bowel and Bladder Retraining
Bowel Programs
Calculating Meal Percentages
Call Light Systems and Adaptations
Cardiac Board
Catheter Care
Central Line Associated Blood Stream Infections
Cognitive Levels of Response
Condom Catheters
Controlled Substance Reconciliation
Daily Nursing Notes
Decannulation Protocol
Digital Stimulation
Documenting Output
Dysphagia Diets
Emergency Kits
Enteral Feeding/Formulas and Pumps
Ergometer
Fluid Consistency
Flush sink
Gastrostomy and Jejunostomy Care
Golvo
Grooming and Hair Care
Hand Hygiene
Heterotrophic Ossification
Hydrotherapy Tub and Lift
Incentive Spirometry
Incontinence Management
Indwelling Foley Catheter
Infectious Waste
Integrity of the Skin
Labeling and Direction Change
Levels of Injury/Functioning
Managing Contaminated Linen
Mechanical Lift
Medication Administration
Medication Disposition
Moisture Barriers
Nail Care
National Patient Safety Goals
Oral Care

Attachment 2 - Training Delivery and Curriculum Listing

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

Ordering
Orthostatic hypotension Mngmt
Oxygen Therapy
Pain Assessment and Management
Passive
Perineal Care
PO Diets
Positioning and Weight Shift
Postular Drainage and Percussion
Preventing Resident Falls
Psychotropic Medications
Pulse
Pulse Oximeter
Recording Intake
Resident Specific Emergency Kit
Respirations
Respiratory Treatments
Seizure Management
Shaving
Shift Reports
Specialty Beds
Splints, Casts and Orthotics
Standing Frame
Storage
Suctioning
Temperature
Tilt Table
Title Table
Tone Management and Agents
Tracheostomy Care
Tracheostomy Change
Transfer Board
Tube Placement Checks
Tube Replacement
Use of Ambu Bag
Use of Ventilators
Ventricular Peritoneal Shunts
Weight Scales
Weight Sheet
Wheelchair (manual & power)
Wound Care
Wound Vac
PL Justification and Details

Attachment 2 - Training Delivery and Curriculum Listing

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

Explain the need for productive laboratory (PL) training	Productive Lab is needed for medical skills training where the trainees must learn as they observe on actual patients and practice their skills until they have achieved full competency with the all the tasks assigned.	
Describe the Equipment/Processes to be used in delivering the PL training	The equipment to be used in productive lab includes general medical equipment such as ventilators, vital signs devices, and specialized medical equipment used in brain and spinal cord injury rehabilitation.	
Describe Trainer Qualifications	Front-line management and supervisors will provide the training for productive lab. These trainers have years of experience in the medical field, are licensed, or take outside training in order to become qualified instructors for our trainees.	
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
GreatCall, Inc.
18-0587**

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Joe Davey
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$313,200.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$313,200.00	N/A	\$0.00	\$485,100.00

APPLICANT PROFILE

Company Summary	GreatCall, Inc. (GreatCall) develops and provides web-based health-related products, software, and services for aging consumers in the United States and Canada.
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Industry Sector(s)	Information
Priority Industry	Yes
No. Employees (Applicant)	State: 616 US: 1,057 World Wide: 1,057
Turnover Rate (Applicant)	5.00%
Repeat Contractor	Yes
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

	Training will include new product functions, new services and technology.
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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	275	\$18.00	36	\$648	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee, Temp to Permanent	75	\$20.00	90	\$1,800	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2006 and headquartered in San Diego, GreatCall's products including cell phones and accessories, are sold directly to consumers through retailers and online. The Company is best known for its Jitterbug cell phones, with easy-to-read numbers and menu. These phones are equipped with an array of health and well-being software, designed for senior citizens. The Company also provides customer support and emergency assistance services through its North American service area inbound call center in Carlsbad. Training will take place, primarily, at the Company's expanded facilities in Carlsbad, and a limited amount at its San Diego headquarters.

2. Current Training Project Details

Purpose of Training

This is GreatCall's third ETP Agreement, and the third within the last five years. Training in the first project focused on Business Skills for newly-hired trainees. Training in the most recent ETP Agreement focused on new technology such as the release a new version of Jitterbug including an updated flip-phone and a new smart phone, Automatic Fall Detection system, Link Application upgrade, and Technical Customer Service skills to help seniors understand and use the Company's products and services.

Technology can be challenging for the older population and many of GreatCall's customers are not adept at operating these devices. The Company provides the necessary products and services that helps this population access technology for their greater benefit.

Training will focus on the skills and knowledge needed to support new products, technology and quality enhancements. One new service, Ride-Sharing Technology for Seniors, is a joint service with the ride-sharing service Lyft. This program will allow GreatCall's customers to access Lyft through their Jitterbug phones. Customers will use their Jitterbug phones to speak with GreatCall customer service, who will then access Lyft's Concierge platform, book the ride, and provide Lyft all relevant contact information to the assigned driver, including special needs instructions.

Training will focus on an upgraded version of its Lively mPERS (Mobile Personal Emergency Response System) product, a one-touch access product worn around the neck and connected to the Company's 5Star urgent response service. The upgraded product offers older adults and family caregivers the ability to integrate health and safety solutions into their lives more effectively. The Lively is smaller and lighter than previous generations and offers more features than previous versions.

GreatCall has succeeded by focusing on ways it can help its customers adapt and utilize innovative technology and to develop and deliver new products and services to its customers. This

PROPOSED TRAINING PROJECT DETAILS

	proposal will also contain courses that were included in the first project. However, the content of these courses has been updated and will only be provided to employees who have not previously received this training.
Training Infrastructure and Administrative Plan	The Director of Training and two administrative staff will oversee all training. GreatCall has obtained the services of Training Funding Partners to assist with administration. Training will be delivered by in-house experts and vendors as needed.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	Although this is the third ETP project for GreatCall, its has not earned \$250,000 for retrainees (non-Job Creation) in the previous five years at the same facility. Therefore, the Substantial Contribution does not apply to this proposal.

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations (Attachment 1) will receive training in Business, Computer and Continuous Improvement Skills (Attachment 2).	

4. Additional Company or Training Project Details

Retrainee - Job Creation

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

due to the increasing senior citizen population, GreatCall is expanding its products and services to meet increasing demand. The Company recently moved to a larger facility in Carlsbad to accommodate continuing growth. GreatCall has committed to hiring 75 new employees in net-new jobs, either during the term of the Agreement or within the three-month period prior to Panel approval.

Temporary to Permanent Hiring

All 75 trainees in Job Number 2 (Job Creation) meet Panel guidelines for “temporary to permanent” employment. The Company states that it uses a temporary staffing agency to facilitate screening of new hires for its call center and other occupations. GreatCall has retained these employees with the

PROPOSED TRAINING PROJECT DETAILS

intention of hiring them into full-time, permanent positions after training is completed. They are typically hired on as full-time, permanent employees after 90 days. They are not eligible for health benefits from GreatCall while employed with the temporary agency. However, once hired as full-time employees, they are eligible for health benefits on the first day of the month after their hire date.

Under the temp-to-perm program, trainees are eligible to participate while on payroll with the temporary agency. However, retention and post-retention wage requirements cannot be met until after trainees have been hired by GreatCall. Until then, GreatCall will not receive progress payments.

Bonus Pay

GreatCall estimates that approximately 15 trainees in Group Number 1 may need bonus pay to meet/exceed ETP's minimum wage. Over the previous 12 months, bonus pay ranged from \$.05 to \$27.19 per hour with the average being \$3.50 per hour.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

GreatCall has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Partners	Fountain Valley	\$11,500.00
Administrative	Training Funding Partners	Fountain Valley	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes GreatCall's performance under prior ETP contracts completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET16-0318	Carlsbad	1/25/16 – 1/24/18	\$261,000	\$261,000*	100%
ET14-0135	Carlsbad	8/26/13 – 8/25/15	\$205,360	\$205,360	100%

PROPOSED TRAINING PROJECT DETAILS

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Account Activation and Billing Processes
	Business Acumen
	Business Development/Planning Skills
	Collaborative Communication Skills
	Customer Service Skills for the Aging Population
	Emergency Medical Dispatch/Emergency Police Dispatch
	New/Updated Technology and Products
	Successful Marketing/Sales Interactions
	Technical Product Support
	Time Management
Computer Skills (Standard)	Ceridian Payroll System
	Customer Relationship Management System
	Customer Service Portal
	Genesys Call Recording/Monitoring System
	Intermediate/Advanced Microsoft Word, Excel, Power
	Microsoft Project
Continuous Improvement Skills	Change Management Skills
	Developing Teams/Goals/Objectives
	Effective Leadership Skills
	Process Improvement/Reengineering Skills
	Project/Performance Management Skills



**TRAINING PROPOSAL FOR
Medata, Inc.
17-0977**

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Cassandra Clady
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 318,480.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 318, 480.00	N/A	\$ 0.00	\$ 404,488.00

APPLICANT PROFILE

Company Summary	Medata, Inc. (Medata) provides medical billing software solution options for the healthcare, workers compensation, and auto liability industry.
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Industry Sector(s)	Information, Software Publisher		
Priority Industry	Yes		
No. Employees (Applicant)	State: 189	US: 230	World Wide: 230
Turnover Rate (Applicant)	6.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on Continuous Improvement, mainly the different types of insurance claims procedures and documentation and claims resolutions. Training will also be provided to staff in Computer Skills to improve skills in new software systems.
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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	117	\$ 18.00	80	\$ 1440	8 - 200
2	Job Creation – Retrainee Initiative Program, Retrainee	50	\$ 20.00	150	\$ 3000	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1975 and headquartered in Irvine, Medata provides medical bill review software solutions for the workers' compensation, auto liability, and healthcare industry. Medata offers a suite of cost-containment products to help customers be more productive.

2. Current Training Project Details

Purpose of Training	<p>Medata's business is growing, with increasing volume of workers' compensation and insurance claims. As such, the Company will be hiring new employees to help with the workload. The Company will train employees on process improvement including claims administration, elements and types of claims, processing and investigating claims, rehabilitation, insurance principles, and insurance management. Process improvement training will enable employees to handle claims fairly and efficiently.</p> <p>Additionally, to meet the aforementioned business needs, workers must be fully trained to use existing and new software systems. The Company recently implemented a fully integrated Claims Management System (CMS) connected to all leading national and regional networks and claims systems such as Preferred Provider Organization (PPO) and Medical Provider Network (MPN). The CMS will provide access to Pharmacy Benefit Management, Utilization Review, Nurse Case Management, E-Billing and Payment processing. Training will allow staff to optimize usage of the CMS. Training will also cover other new medical billing software systems.</p>
Training Infrastructure and Administrative Plan	<p>The ETP project administration will be overseen by the Company's Human Resource Manager with assistance from HR Staff. The Company has also retained Corporate Tax Incentives LLC as an administrative subcontractor. HR staff will work with and support internal managers, trainers, vendors, and the administrative subcontractor to schedule training, collect and maintain documentation, track performance.</p> <p>A training plan has already been established. Incumbent workers will require a high number of training hours due to a wide range of continuous improvement concepts and technical skill set competencies. Newly hired workers will need training on current systems and processes, in addition to incumbent training, to successfully transition into their job functions. Training will begin after approval. All training will be delivered by in-house subject-matter experts.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

Substantial Contribution Description	N/A
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3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1 will receive training applicable to their jobs in Business Skills, Commercial Skills, Continuous Improvement, and Computer Skills.	

4. Additional Company or Training Project Details

Retrainee- Job Creation

The Job Creation program provides incentives to companies that commit to hiring new employees including a higher Reimbursement Rate.

Medata is expanding business capacity by hiring new employees to existing functions. New employees will help the Company manage increasing workload. Medata has committed to hiring 50 new employees. Trainees must be hired within three month period prior to approval or during the term of the contract. Trainees are hired into “net new jobs” as a condition of contract.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Corporate Tax Incentives LLC	Rancho Cordova	\$ 31,848.00
Administrative	Corporate Tax Incentives LLC	Rancho Cordova	Not to exceed 13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

PROPOSED TRAINING PROJECT DETAILS

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Business Administration
	Communication
	Customer Service
	Finance/Accounting
	Presentation Skills
	Product Knowledge
	Project Management
	Sales & Marketing
Commercial Skills (Standard)	Accounts Payable/Receivable
	Anatomy and Medical Terminology
	ASC Review Terms, Definitions, and Protocols
	Audit Skills
	Basic Accounting - Credits/Debits
	Basics of Workers Compensation
	Bill With Single or Concurrent Coverage International Classification Diseases
	Cataloging and Retrieving Documents
	Collections/ Billing
	Common Terms Utilized in Physical Exams
	Current Procedural Terminology
	Dermatology Terms, Definitions, and Protocols
	Detecting Medical Billing Fraud
	EHR Concepts
	Familiarity with Medical terms
	Formatting for Medical Correspondence
	Formatting HER Data
	Health Care Finance and Administration Common Procedural Coding System
	Hospital / Facility Training Terms, Definitions, and Protocols
	ICD-10 Training
	In-Patient Review Terms, Definitions, and Protocols
	Injury Management, Return to Work
	Input and Output Charts
	Insurance Coverage Knowledge
	Introduction to Billing Forms
	Introduction to Billing Software
	Introduction to Coding Systems
	Introduction to Electronic Health Record
Introduction to Health Maintenance Organizations	
Introduction to Medical Insurance Programs	
Introduction to Medicare/Medical	

Attachment 2 - Training Delivery and Curriculum Listing

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

	Invoice for Services
	Knowledge of Insurance Coding
	Maintain Payroll Records
	Maintain Up-to-Date Record Keeping
	Medical Records Software Exercises
	Medical Terms
	New Drug Protocol Training
	Official Duration Guidelines for Disability
	Pharmaceutical Terms, Definitions, and Protocols
	Physicians Services Overview Terms, Definitions, and Protocols
	Private Insurance Terminology
	Proper Use of Code Book
	Radiation Oncology Terns, Definitions, and Protocols
	Record Payments
	Regulatory Terms, Definitions, and Protocols
	Root Words, Suffixes, and Prefixes
	Software Billing Functions
	Subrogation for Workers Compensation
	Workman's Compensation Claims Processing Best Practices
Computer Skills (Standard)	Document Imaging System Skills
	Electronic Health Records Software Training
	Insurance System Skills
	Intranet Skills
	Microsoft (Office 365/Project/SharePoint)
	Payroll/Human Resources
	Provider Access Websites
	Skype for Business
Continuous Improvement Skills	Clarifying Objectives
	Coaching
	Customer Expectations & Feedback
	Leadership
	Process Improvement
	Quality Concepts
	Teambuilding
	Time Management
	Total Performance Management
	Trend Analysis and Root Cause Analysis

Orange County Global Medical Center, Inc.

Refernece Number: 17-0802

Withdrawn

**Stryker Corporation,
Stryker Neurovascular Division**

Reference Number: 17-0879

Withdrawn



TRAINING PROPOSAL FOR
Constellation Brands U.S. Operations, Inc.
17-0859

Panel Meeting Date: December 8, 2017
Regional Office: Sacramento Regional Office
Analyst Name: Karen Mam
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING: \$505,350.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$505,350.00	N/A	\$0.00	\$657,516.50

APPLICANT PROFILE

Company Summary	Constellation Brands U.S. Operations, Inc. (Constellation) (www.cbrands.com), produces and markets beer, wine and spirits.
------------------------	--

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 1853	US: 3794	World Wide: 7751
Turnover Rate (Applicant)	1.80 %		
Repeat Contractor	Yes		
High Unemployment Area	Yes		
Union(s)	United Food & Commercial Workers International Unions 8 and 186D		

TRAINING PROFILE

Training Objective(s)	Training will focus on improving staff's overall skill set, and new and upgraded equipment.
------------------------------	---

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	1,123	\$18.00	25	\$450	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Constellation will act as the lead in a single employer contract with its subsidiary Franciscan Vineyards, Inc.

Founded in 1945 and headquartered in Victor, N.Y., Constellation produces and markets beer, wine and spirits with operations in the U.S., Canada, Mexico, New Zealand and Italy. Constellation produces high end brand beers such as Corona, Modelo Especial and Pacifico. The Company produces premium wine, including Robert Mondavi, Clos du Bois, Kim Crawford, Meiomi, Mark West, Ruffino and The Prisoner. Constellation products also premium spirits such as SVEDKA Vodka, Casa Noble Tequila and High West Whiskey. The Company will have 15 locations participate in training and will be led by its St. Helena location.

Franciscan Vineyards, Inc. is grape grower and wine manufacturer headquartered in St. Helena. The Company will have nine locations participate in this Agreement.

2. Current Training Project Details

Purpose of Training	<p>This is Constellation's second ETP Agreement, and first in the last five years. The Company is implementing a training initiative companywide focused on increasing the skillsets of its workers as the Company introduces more complex technology, requiring higher level decision making skills. Modern techniques such as a computer controlled irrigation systems require staff to analyze data, problem solve, and identify process improvement opportunities throughout the grape-growing and winemaking processes. Training will also focus on best practices throughout all production roles to ensure processes are effective and successful.</p> <p>Constellation recently invested over \$5M on new equipment including high solid filters, cross flow filters, rapid cold stabilization, decanter, continuous bladder presses, and a new model centrifuge and flash détente. Constellation must train workers to provide the skills to operate, maintain and repair the new equipment.</p> <p>Finally, all staff will receive training on software and communication skills. Training will improve proficiencies and will lead to a reduction in errors and waste.</p>
Training Infrastructure and Administrative Plan	<p>Constellation has an assigned Director and a training manager responsible for overseeing all project management and coordination of all training efforts companywide. All participating locations have been trained on ETP record keeping requirements. The St. Helena location will house all original training records. To assist the training manager, support staff at each location will assist with scheduling and recordkeeping. In-house subject-matter experts and vendors may be utilized to deliver training.</p> <p>In addition, the Company has retained the services of a third-party administrator, Tax Credit Co, Inc., to assist with all administrative duties.</p>

PROPOSED TRAINING PROJECT DETAILS

Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Business, Computer, Commercial, Continuous Improvement and Manufacturing Skills.	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Constellation has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Tax Credit Co Inc	Los Angeles	\$ 30,321.00
Administrative	Tax Credit Co Inc	Los Angeles	13% of payment earned
Training	To be Determined	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Coaching
	Collaboration Techniques
	Communication Skills
	Conflict Management
	Effective Meetings
	Influencing Others
	Interpersonal Skills
	Leadership Skills for Frontline Workers
	Managing Change
	Presentation Skills
	Training Others
Commercial Skills (Standard)	Ammonia Awareness and RMP Awareness
	Bloodborne Pathogens
	Chemical Storage
	Handling Hazardous Materials
Computer Skills (Standard)	AgCode
	AS400
	Creating and Posting Videos
	Intelex
	JD Edwards (JDE)
	Microsoft Office Suite (Intermediate/Advanced)
	Microsoft Sharepoint
	Phoenix
	Work Order Request/Scheduling
Workday	
Continuous Improvement Skills	Analyzing Data
	Best Practices
	Decision Making
	Problem Solving
	Root Case Analysis
	Team Building
Manufacturing Skills (ME) (Standard)	Centrifuge and Flash Detente
	Continuous Bladder Press
	Cross Flow Filters
	Decanter
	Equipment Operation
	High Solid Filters
	Rapid Cold Stabilization



United Food & Commercial Workers International Union, ALF-CIO, CLC

Jacques Loveall
President
International Vice President

Roseville
(Headquarters)
2200 Professional Dr.
Roseville, CA 95661
(916) 786-0588
(916) 786-0958 (fax)

October 3, 2017

Bakersfield
900 Airport Dr.
Bakersfield, CA 93308
(661) 391-5770

Mr. Stewart Knox
Executive Director
Employment Training Panel
1100 J Street, Suite 400
Sacramento, CA 95814

Chico
20 Constitution Dr.
Suite C
Chico, CA 95973
(530) 895-0017

RE: Mission Bell Winery

Concord
1000 Burnett Ave.
Suite 130
Concord, CA 94520
(925) 687-8018

Dear Mr. Knox

I am writing on behalf of UFCW 8 Golden State. We Support the proposal being submitted to the Employment Training Panel from Mission Bell Winery

Fresno
3485 W. Shaw Ave.
Suite 101
Fresno, CA 93711
(559) 271-1288

This application will assist Mission Bell Winery in meeting its goals. The proposed training will assist our Union members in developing new skills.

Fresno
*Distillery, Wine & Allied,
and Wholesale Division*
3485 W. Shaw Ave.
Suite 102
Fresno, CA 93711
(559) 226-5045

Sincerely,

JOE CIOTTI
Wholesale Industry Director

Modesto
2007 Yosemite Blvd.
Modesto, CA 95354
(209) 529-0596

JC:cjs

Redding
3400 Bechelli Ln.
Suite C
Redding, CA 96002
(530) 222-3905

cc: Jacques Loveall
Kirk Vogt
Salvador Madrigal

Sacramento
1930 9th Street
Sacramento, CA 95811
(916) 503-8828

Santa Rosa
940 Hopper Ave.
Santa Rosa, CA 95403
(707) 546-1384



UFCW-WINE, DISTILLERY & ALLIED WORKERS, LOCAL 186D

329 Downey Ave.
Modesto, CA 95354-1297

Phone (209) 524-4245
Fax (209) 524-7066

October 4, 2017

Mr. Stewart Knox
Executive Director
Employment Training Panel
1100 J Street, 4th Floor
Sacramento, CA 95814

Dear Mr. Knox:

I am writing on behalf of the United Food and Commercial Workers International Union of America, Local Union 186D. We support the proposal being submitted to the Employment Training Panel from Constellation Brands U.S. Operations Inc.

This application will assist Constellation Brands U.S. Operations Inc. in meeting our goals. The proposed training will assist our union members in developing new skills to help meet operational demands.

Sincerely,

A handwritten signature in cursive script that reads "Bill Hale".

Bill Hale, President
UFCW Local 186D



**TRAINING PROPOSAL FOR
Diamond Foods, LLC
18-0602**

Panel Meeting Date: December 8, 2017
Regional Office: Sacramento Regional Office
Analyst Name: Jana Lazarewicz
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 371,087.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 436,572.00	N/A	\$ 65,485.00	\$ 450,000.00

APPLICANT PROFILE

	Diamond Foods, LLC (Diamond Foods) specializes in the production and distribution of nuts.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 580	US: 800	World Wide: 800
Turnover Rate (Applicant)	12.00 %		
Repeat Contractor	Yes		
High Unemployment Area	Yes		
Union(s)	Cannery Workers, Processors, Warehousemen and Helpers Local 601		

TRAINING PROFILE

Training Objective(s)	Diamond Foods has invested in new equipment and will train staff in processes that will increase productivity, capacity, and the technical expertise of their staff. Additionally, the Company will cross-train employees to ensure that employees are fully versatile to work on different equipment.
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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	362	\$ 18.00	67	\$ 1206	8 - 200

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

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1912 and headquartered in Stockton, Diamond Foods produces and distributes an assortment of premium shelled and in-shell nut products. Products, including walnuts, pecans, almonds, macadamias, pine nuts, hazelnuts, cashews, and pistachios, can be found in grocery stores and convenience stores throughout the country. Training will take place at the Company's location in Stockton.

2. Current Training Project Details

Purpose of Training	<p>This is Diamond Foods' second ETP Agreement and the second in the last five years. In this proposal, Diamond Foods will continue to build on its previous training of improving efficiency and productivity and maximizing use of its Enterprise Resource Planning (ERP) software. The Company will also provide training on new equipment, advanced production processes, and other software programs. Training will not be duplicated.</p> <p>Diamond Foods continues to upgrade processes and technology to keep pace with industry and customer demands. The Company recently invested \$1M on new machinery such as shelling operation equipment and packaging line equipment. Implementation of all new equipment is scheduled to be completed by March 2018. New machinery will improve efficiency and productivity. Trainees will also be cross-trained on all equipment. The Company has emphasized the importance of diversification of job functions to give trainees transferrable skills that will make them more promotable in the manufacturing industry.</p> <p>Additionally, Diamond Foods recently upgraded its ERP to allow for immediate access to inventory with real time communication. Training will provide employees with the necessary skills to navigate the system to improve processes.</p>
Training Infrastructure and Administrative Plan	<p>Diamond Foods has designated the Director of Human Resources and an additional staff member to plan and oversee all aspects of training. These are the same individuals who oversaw administration of the prior Agreement. The Company already has a process in place to ensure all administrative duties are handled properly and all unit managers are informed of their responsibilities. In addition, Diamond Foods has retained the services of a third-party administrative subcontractor to assist with administrative requirements.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

Substantial Contribution Description	Diamond Foods' prior agreement concluded in July 2017 (ET16-0118) with earnings in excess of \$250,000 at the Stockton location (See Section 4.3 Previous ETP Project Summary). As such, a first-time Substantial Contribution of 15% will be applied to the proposed Training Project for training at the same location.
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3. Curriculum Summary

A summary of the curriculum appears below. *Attachment 2 - Training Delivery and Curriculum Listing* provides more detail.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1, Exhibit A will receive training applicable to their jobs in Business, Computer, Continuous Improvement, Hazardous Materials, Management, and Manufacturing Skills topics under Attachment 2, Curriculum.	

4. Additional Company or Training Project Details

Union Support

The Maintenance, Production Staff, Quality Control and Warehouse Staff are represented by a local union: Cannery Workers, Processors, Warehousemen and Helpers Local 601. A union letter of support has been submitted for the training of their respective members.

Out-of-State Vendor

Diamond Foods is requesting to use an out-of-state consultant in connection with this proposal. Training Grants Intelligence Inc. (TGII), located in Suwanee, GA, assisted with the development of this proposal at no cost. Given the business relationship established in Diamond Food's prior agreement and sustained during the development process of this proposal, the Company would like to continue this relationship and requests to utilize this out-of-state vendor for administrative services. TGII has ETP program experience and has worked with other contractors. Training will be documented via email and online services. Diamond Foods will be responsible for recordkeeping and delivery of training. All original rosters will be maintained at Diamond Foods' Stockton location.

4.1 Program Waivers

N/A

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Grants Intelligence Inc.	Suwanee, GA	For no fee
Administrative	Training Grants Intelligence Inc.	Suwanee, GA	Not to exceed 13% of funding earned
Training	To Be Determined	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes Contractor's performance under a prior ETP contract completed within the last five years.

Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET16-0118	Stockton	07/27/2015– 07/26/2017	\$434,484	\$422,000	97%

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the training, curriculum, and proposal characteristics.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Business Planning
	Communication Skills
	Project Management
	Time Management
Computer Skills (Standard)	Advanced JD Edwards (JDE) System
	Alchemy Software
	Bar Code Scanning System
	Intermediate/Advanced Microsoft Office
	Kronos
	MP2 CMMS System
Continuous Improvement Skills	Best Practices
	Environmental Sustainability
	Problem Solving/Decision Making
	Process Improvements
	Quality Concepts/Control
	Review of Business/Operations for Improvements
	Team Development
Hazardous Materials Skills	Hazardous Material Handling and Disposal
	Hazardous Materials Communication Skills
	Hazardous Materials Safety
	HAZMAT - Annual Refresher (8 hours)
	HAZMAT - Complete Course (24 hours)
Management Skills	Coaching
	Conflict Resolution
	Leadership Skills
	Team Building
Manufacturing Skills (ME) (Safety)	Forklift Safety
	Lock-Out/Tag-Out
	Warehouse Safety
Manufacturing Skills (ME) (Standard)	Attaching and Operating Manbasket
	Automation Implementation
	Autonomous Maintenance
	Bulk Handling
	Bulk Storage
	Confined Space
	Controls Systems/Electrical Systems
	Conveyors Training
	Cross-Training
	Distribution Training

Attachment 2 - Training Delivery and Curriculum Listing

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

Drum Dolly
Dry Burst Chamber Operation
Equipment Assembly
Equipment Operation/Maintenance
Equipment Troubleshooting
Food Safety
Forklift Operations
Good Manufacturing Processes
Heating Chambers
Horizontal Fillers
Logistics
Manual Pallet Jack
Nut Bleaching/Blanching
Nut Cracking Machine
Oil Roaster
OSHA 10/30
Oven
Packaging Line/Downstream Equipment
Packer/Stacker Training
Pallet Wrapper Operation
Palletizing
Preventative Maintenance
Production Operations - Processing/Packaging
Quality Assurance
Robotics
Sanitation Equipment
Shelling Equipment
Sizing Equipment
Standard Cleaning and Sanitation
Vertical Filler
Warehouse Processes



TEAMSTERS UNION LOCAL No.601

Cannery Workers, Processors, Warehousemen, and Helpers

Maria Ashley Alvarado
Principal Officer

Fax 209-323-7001

September 15, 2017

Hector Bolaños
Sr. Director of Human Resources
Diamond Foods LLC
1050 S. Diamond St.
Stockton, CA 95205

RE: ETP Training Program

Teamsters Local Union 601 supports the ETP training program at Diamond Foods LLC, which will provide our members with the skills needed to meet their employer's requirements, which in turn will provide a secure work environment for the future

Regards,

Pablo Barrera
Business Agent
Teamsters Local Union 601



RETRAINEE - JOB CREATION

Training Proposal for:

Flatiron West, Inc.

Agreement Number: ET18-0144

Panel Meeting of: December 8, 2017

ETP Regional Office: Sacramento

Analyst: K. Smiley

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SET Job Creation Initiative	Industry Sector(s):	Engineering Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Solano, San Deigo, San Bernardino	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No 1) Operating Engineers Local 3 JAC; 2) Operating Engineers local 12; 3) Northern California Carpenters Regional Council; 4) Pile Drivers of 46 Northern California; 5) District Council of Plasters and Cement Masons of Northern California; 6) Northern California District Council of Laborers; 7) Cement Masons Local 500 & 600; 8) Southern California District Council of Laborers; 9) Southwest Regional Council of Carpenters.		
Number of Employees in:	CA: 947	U.S.:2,133	Worldwide: 2,475
<u>Turnover Rate:</u>	13%		
<u>Managers/Supervisors:</u> (% of total trainees)	1%		

FUNDING DETAIL

	-	(Substantial Contribution)	(High Earner Reduction)	=	Total ETP Funding
\$339,500		\$0	\$0		\$339,500

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

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	
				Class / Lab	CBT		
1	Retrainee Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, HAZMAT, HAZWOPER, OSHA 10/30	500	8-200	0-25	\$630	\$22.04
				Weighted Avg: 35			
2	Retrainee Job Creation Initiative Priority Rate SET	Business Skills, Commercial Skills, Computer Skills, Continuous Impr, HazMat, HAZMAT, HAZWOPER, OSHA 10/30	35	8-200	0-25	\$700	\$13.22
				Weighted Avg: 35			

Minimum Wage by County: Job Number 1: (SET/Priority Industry): \$22.04 per hour; Job Number 2: \$13.94 per hour for San Diego County and \$13.22 per hour for San Bernardino and Solano 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 for Job Numbers 1.

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Job Number 1		
Administrative Staff		57
Engineer		63
Estimator		27
Laborer		200
Mason		20
Carpenter		38
Machine Operator		6
Project Leader		77
Safety Manager		12
Job Number 2		
Administrative Staff		1
Engineer		2

Estimator		2
Laborer		17
Mason		5
Carpenter		2
Machine Operator		2
Project Leader		3
Safety Manager		1

INTRODUCTION

Founded in 1947 and headquartered in San Marcos, Flatiron West, Inc. (Flatiron) (www.flatironcorp.com) is a civil engineering and construction company that provides infrastructure building services throughout California for the transportation, energy and water industry sectors. The Company builds roads, bridges, tunnels, and water/wastewater projects, for both public and private clients. Flatiron delivers projects through a variety of contracting methods, including full cycle design-build projects and public-private partnerships.

Flatiron has facilities throughout the country; however, only the California locations in San Marcos, Benicia and Chino Hills will participate in training.

PROJECT DETAILS

This is Flatiron's second ETP Agreement and the second within the last five years. The first Agreement focused on construction technologies, improving customer service skills, and reducing costs by improving employee productivity. This Agreement will focus on construction skills and process improvements.

Flatiron was awarded contracts with the Cities of Elk Grove and Sausalito to update and retrofit their existing water treatment plants. The Company is also involved in the design and construction of California's high-speed rail project which recently started in November. Training on construction techniques is necessary for trainees to gain proficiency and ensure successful completion of these projects. Courses will include Railroad Construction Procedures, Field Operational Procedures, and Storm Water Pollution Prevention Plans (SWAPP).

Additionally, the Company will train employees on skills to increase productivity and improve operational efficiencies, keeping pace with customer demands and industry standards. Training will be provide in Business, Computer, and Commercial Skills.

Training Plan:

Training will be delivered via Classroom/Laboratory and Computer-Based Training (CBT) methods. In-house subject matter experts and external training vendors may be utilized to deliver training in the following.

Business Skills: Training will be offered to all occupations. Training will ensure trainees a foundation of appropriate skills and knowledge of internal business processes.

Commercial Skills: Training will be offered to all occupations except Administrative Staff. Training will increase trainee knowledge and ensure efficient production.

Computer Skills: Training will be offered to all occupations. Training will be provided on a variety of software systems.

Continuous Improvement: Training will be delivered to all staff. Staff will receive training in process improvement to promote efficiency.

Hazardous Materials: Training will be delivered to Engineers, Laborers, Masons, Carpenters, and Machine Operators to ensure staff utilize safe practices while working with chemicals.

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 Frontline workers and 30 hours for frontline supervisors. Engineers, Laborers, Masons, Carpenters, and Machine Operators will receive OSHA 10 training. Project Leaders and Safety Managers will receive OSHA 30 training. The coursework is geared towards construction work, and also manufacturing. Completion of the training results in a certificate that expands employment opportunities. The coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.

Hazardous Waste Operations and Emergency Response Standard (HAZWOPER). This training is a series of courses specifically designed for workers who handle hazardous substances as first-responders, or clean-up as needed at a hazard disposal or emergency site. It consists of 40 hours of classroom training or CBT, for workers stationed at the hazard site; and 24 hours for workers who visit the site (e.g., engineers). 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. Flatiron represents that trainees will not receive 40 hours unless they work full time onsite at the clean-up location.

Hazardous Materials (HAZMAT). This training is a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Engineers and Safety Managers will receive up to 30 hours of training. 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 will be CalTRANS.

Computer Based Training (CBT)

CBT will be provided to supplement Class/Lab training. Trainees in Job Numbers 1 and 2 will receive no more than 25 hours of CBT.

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.

Flatiron has taken on two new, substantially large contracts requiring the expansion of business capacity and hire of new employees. The Company has committed to hiring 35 new employees (Job Number 2). Trainee occupations include Administrative Staff, Engineer, Estimator, Laborer, Mason, Carpenter, Machine Operator, Project Leader, and Safety Manager. 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 this contract.

Union Support

The unions representing these occupations have expressed their support for this training plan. However, Flatiron has not been able to collect all union letters of support. The Company is aware that training for employees cannot begin until the union letters are received.

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.

Commitment to Training

Flatiron has an annual training budget of \$400,000 for training which includes mandatory safety training, employee orientation, sexual harassment prevention and first aid 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

Flatiron is ready to start training upon Panel approval. Training will be provided at Flatiron's facilities in Benicia, San Marcos and Chino Hills by a combination of in-house staff and vendors. Flatiron has assigned two Administrative Assistants from the Benicia location to handle day-to-day administrative duties. In addition, each participating location will assign a staff member to manage the ETP documentation for their respective office.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0243	San Marcos	08/04/2014– 08/03/2016	\$388,960	\$388,960 (100%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

AGC of California, located in San Diego, has been retained to provide Project Management training for a fee of \$110 per trainee. Other trainers will be identified for ETP record-keeping purposes, as they are retained by Flatiron.

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- Change Management
- Coaching
- Communications Skills
- Conflict Resolution
- Critical Path Method (CPM) Scheduling
- Data Collection
- Document Control & Record Keeping
- Estimating (Pricing, Quantity Takeoff, Administration)
- Financial Risk Analysis (Insurance, Claims & Risk, Forecasting & Cost Control)
- Leadership
- Payroll Processing
- Performance Management (Goals, Development Plans)
- Product & Service Knowledge
- Project Management
- Time Management

COMPUTER SKILLS

- Bid2Win (Estimating Software)
- Computer Aided Design (CAD)
- Deltek Vision Customer Relationship Management (CRM)
- JD Edwards Financial Accounting System
- Nice Touch
- McGraw Hill, Job Sourcing and Specification Software
- MS Office (Intermediate and Advanced)
- MS SharePoint
- MS Project
- Heavy Job
- Critical Path Method (CPM) - Primavera
- Career Management System (CMS)

COMMERCIAL SKILLS

- Airport Construction Procedures
- Civil Engineering
- Equipment Operations (Crane, surveying, forklift)
- Field Operational Procedures
- Geology /Geotech Skills
- Occupational Health & Safety Advisory Services 18001
- Project Closeout
- Railroad Construction Procedures
- Storm Water Pollution Prevention Plans (SWPPP)
- Trench & Excavations
- Value Engineering
- Operational Efficiency

- Performance Improvement
- Process Improvement
- Productivity Improvement
- Project Planning
- Quality Improvement
- Teamwork

CONTINUOUS IMPROVEMENT

- Quality Systems
- Six Sigma/Lean
- Company Quality Systems & Processes

HAZARDOUS MATERIALS

- Material Safety Data (MSDS)
- Waste Handling

OSHA 10/30 (Certified OSHA Instructor) (Trainer-to-Trainee ratio 1:40)

- OSHA 10 (requires completion of full 10-hour course)
- OSHA 30 (requires completion of full 30-hour course)

HAZARDOUS MATERIALS (HAZMAT) (Trainer-to-Trainee ratio 1:40)

- HAZMAT – Annual Refresher
- HAZMAT – Complete Course

HAZWOPER (Trainer-to-Trainee ratio 1:40)

- HAZWOPER - Complete Course
- HAZWOPER – For Visiting Workers
- HAZMAT – Complete Course for Full-Time Site Staff

CBT Hours

0-25

BUSINESS SKILLS

- Communication – Giving Feedback (1 Hour)
- Decision Making 1: The Fundamentals (1 Hour)
- Financials 1- Principles of Accounting and Finance for Non-financial Professionals (1 Hour)
- Financials 2- Cash Flow Management Essentials for Non-financial Professionals (1 Hour)
- Financials 4- The Essentials of Budgeting for Non-financial Professionals (1 Hour)
- Government Contracting Essentials (1 Hour)
- Interpersonal Communication: Being Approachable (1 Hour)
- Interpersonal Communication: Communicating with Confidence (1 Hour)
- Interpersonal Communication: Listening Essentials (1 Hour)
- Leadership Essentials: Building Your Influence as a Leader (1 Hour)
- Leadership Essentials: Creating Your Own Leadership Development Plan (1 Hour)
- Leadership Essentials: Leading Change (1 Hour)

- Leadership Essentials: Leading with Emotional Intelligence (1 Hour)
- Leadership Essentials: Motivating Employees (1 Hour)
- Mentoring & Coaching- Coaching Performance (2 Hours)
- Mentoring & Coaching- Mentoring Effectively (2 Hours)

COMPUTER SKILLS

- MS Excel 2007 (2.1)- Advanced Formatting in Excel (2 Hours)
- MS Excel 2007 (2.2)- Advanced Data Management in Excel 2007 (1.5 Hours)
- MS Excel 2007 (2.3)- Advanced Customization in Excel 2007 (2 Hours)
- MS Word 2007 (2.1)- Advanced Formatting in Word (1.5 Hours)

CONTINUOUS IMPROVEMENT

- Problem Solving 1: The Fundamentals (1 Hour)
- Problem Solving 2: Determining and Building Your Strengths (1 Hour)
- Project Management 1- Project Management Fund. (2.5 Hours)

COMMERCIAL SKILLS

- Asbestos Awareness (1 Hour)
- Chlorine (1 Hour)
- Compressed Gas (1 Hour)
- Confined Spaces (1 Hour)
- Crane Signaling and Communications (30 Minutes)
- Defensive Driving (30 Minutes)
- DOT Security for Shipment of Hazardous Materials (1 Hour)
- Electrical Intro (1 Hour)
- Environmental Management Systems (EMS) (1 Hour)
- Environmental Regulations Overview (1 Hour)
- Fall Protection -Working at Heights (1 Hour)
- Forklift Operations (1 Hour)
- Hand and Power Tool Operations (1 Hour)
- Hearing Conservation (30 Minutes)
- Heat Stress Recognition and Prevention (1 Hour)
- Job Hazard Analysis (30 Minutes)
- Ladder operations (30 Minutes)
- Lead Awareness (30 Minutes)
- Lockout/Tagout (30 Minutes)
- Lockout/Tagout for Authorized Persons (1.5 Hours)
- Respiratory Protection (30 Minutes)
- Scaffolding and Ladder procedures (30 Minutes)
- Silica (30 Minutes)
- Spill Prevention and Control (1 Hour)
- Spill Prevention Control and Countermeasure Plan (30 Minutes)
- Storm Water Pollution Prevention (1 Hour)
- Trenching and Excavation procedures (30 Minutes)
- Welding, Cutting, and Brazing (30 Minutes)
- Time Management: Planning and Prioritizing Your Time(1 Hour)

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. CBT is capped at 50% of total training hours, per trainee excluding OSHA 10/30, HAZWOPER and HAZMAT.



OPERATING ENGINEERS LOCAL UNION No. 3

1620 SOUTH LOOP ROAD, ALAMEDA, CA 94502-7089 • (510) 748-7400 • FAX (510) 748-7436
Jurisdiction: Northern California, Northern Nevada, Utah, Hawaii, and the Mid-Pacific Islands

August 23, 2017

Ms. Jill McAloon
Acting Executive Director
The Employment Training Panel
1100 J Street, Fourth Floor
Sacramento, CA 95814

Re: Union Support for ETP Funding
Flatiron West, Inc. – Account: ET17-0106

Dear Ms. Jill McAloon,

This letter is to confirm support by Operating Engineers Local Union No. 3 for Flatiron West, Inc.'s proposed training to be submitted to Employment Training Panel.

Sincerely,

Gening Liao, Esq.
House Counsel
Operating Engineers Local Union No. 3

GL:itj
Opeiu29/af-cio

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**TRAINING PROPOSAL FOR
Milestone Technologies Inc.
17-0938**

Panel Meeting Date: December 8, 2017
Regional Office: Sacramento Regional Office
Analyst Name: Karen Mam
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 656,439	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 656,439	N/A	\$ 0.00	\$ 818,100

APPLICANT PROFILE

Company Summary	Milestone Technologies, Inc. (Milestone) operates as a managed service provider and offers strategic information technology (IT) solution services to businesses worldwide.
------------------------	---

Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. Employees (Applicant)	State: 1,283	US: 1,679	World Wide: 1,886
Turnover Rate (Applicant)	4%		
Repeat Contractor	Yes		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Milestone will continue implementing their "Extra Mile" customer service training program. Training will also focus on process improvement to meet the needs of the continuously changing technology industry.
------------------------------	--

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 – Job Creation Initiative Program	64	\$ 20.00	80	\$ 1,600	8 - 200
2	Retrainee	523	\$ 15.00	67	\$ 1,005	8 - 200
3	Retrainee, Veterans Program	19	\$ 22.00	68	\$ 1,496	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1997 and headquartered in Fremont, Milestone (<http://www.milestonepowered.com>) provides strategic IT solution services to over 200 companies worldwide. The Company's services include: Data Center Operations, Contact Center Services, Internal IT Support, IT Professional Services, and Platform Engineering Services.

Training under this proposal will be for staff located at their Chico and Fremont facilities.

2. Current Training Project Details

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

Purpose of Training

This is Milestone's second ETP Agreement, the second in the last five years. In the previous Agreement, (included only the Chico location) the Company introduced their "Extra Mile" training program focused on excellent customer service based on the foundations of the Company's five Pillar Value model:

- Going Above and Beyond;
- A Sense of Urgency;
- We Do What We Say;
- Open, Honest, and Respectful Communication; and
- Collaboration.

Milestone continues to update its "Extra Mile" training program adding new models such as "Controlling Interactions" and "Emotional Intelligence". Training under this proposal will again focus on providing customer service.

In addition, Milestone must continuously adapt to changes within the technology industry as new products are introduced and new clients acquired. Milestone will train staff on client products to ensure staff is able to complete service calls in an effective and proficient manner. Training will ensure the Company delivers innovative services, making clients' IT infrastructure smarter, more streamlined and more successful.

Some training topics are similar to those in the prior Agreement, however, trainees will not repeat the same training previously received.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Milestone has designated a training manager and two support staff to administer the project, the same individuals who administered their prior ETP Agreement. These individuals will schedule training and ensure that all record keeping requirements are met. The Company also has three full time trainers responsible for the delivery of their training plan.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified on Attachment 1 will receive training applicable to their jobs in Computer Skills and Continuous Improvement.	

4. Additional Company or Training Project Details

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

4.1 Program Waivers

Provided here are the waivers and their descriptions that apply to this Panel Proposal.

Waivers	Description
Retention Period for Veterans	Veterans will use alternate Retention Period of 500 hours within 272 consecutive days, working full-time with one or more Employers

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

PROPOSED TRAINING PROJECT DETAILS

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET16-0241	Chico	11/16/15 – 11/15/17	\$444,400.00	\$444,400.00	100%
Notes	This Agreement is closed.				

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
Computer Skills (Standard)	Asset Management
	Contract Management
	Customer Relationship Management Software
	New DLC
	New Hardware
	PAWS
	Update Training
	Web-Based Products
Continuous Improvement Skills	Application Support
	Communication Skills
	Customer Service
	Decision Making
	Excellence Training
	Extra Mile Service Culture
	Ideal Team Player
	Order Management
	Presentation Skills
	Process Improvement
	Quality Assurance
	Quality Measures & Goals
	Communication Skills
	Software Tools
	Strategic Planning
	Teambuilding
	Tech Support
	Time Management
	Troubleshooting Skills
	Product Warranty
Workflow	



**TRAINING PROPOSAL FOR
The Neil Jones Food Companies
17-0696**

Panel Meeting Date: 12/08/2017
Regional Office: Sacramento Regional Office
Analyst Name: Jesse Dongallo
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 275,274.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 275,274.00	N/A	\$ 0.00	\$ 300,000.00

APPLICANT PROFILE

Company Summary	The Neil Jones Food Companies dba Tomatek, Inc. (Tomatek) is a privately-owned, family-run company specializing in the manufacturing of traditional and organic fresh fruit and tomato products.
------------------------	--

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 1805	US: 2295	World Wide: 2295
Turnover Rate (Applicant)	9.06 %		
Repeat Contractor	Yes		
High Unemployment Area	Yes		

TRAINING PROFILE**Training Objective(s)**

Tomatek will train staff on new operational procedures and technology. Training will focus on improving quality standards to meet customer demands.

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

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	115	\$ 18.00	53	\$ 954	8 - 200
2	Retrainee, Seasonal Worker	219	\$ 18.00	42	\$ 756	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1915 and located in Firebaugh, Tomatek began as a grower-owned tomato cannery in Hollister. Today, Tomatek is a leading producer of tomato products, such as whole tomatoes, crushed and diced tomatoes, tomato sauces, tomato paste, and ketchup. Tomatek also specializes in canned fruits, fruit juice concentrates and cranberry sauces. The Company's products are purchased by retailers such as Pizza Hut, Applebees, Lil Ceasars, and Subway. Other customers include the food service industry and warehouse distribution centers.

The Company's training plan is supported by Teamsters District Council 2. The union represents both the permanent and seasonal employees included in this proposal. (See letter of support)

Training will take place at Tomatek's Firebaugh facility.

2. Current Training Project Details

Purpose of Training	<p>This is the company's third ETP contract, the first within the last five years.</p> <p>Tomatek is training to improve its workforce skills and remain competitive. Training will focus on cross-training of production occupations for a better understanding of processes including new processes for tablets and scan guns to improve inventory traceability and an updated Enterprise Resource Planning (ERP) system.</p> <p>Additionally, Tomatek must provide training on production standards, especially the Global Food Safety Initiatives (GFSI) standards. Many of the Company's customers require GFSI level audits and compliance. Maintaining GFSI standards will allow Tomatek to maintain its reputation as a good manufacturer.</p>
Training Infrastructure and Administrative Plan	<p>Tomatek's senior Human Resource Manager and support staff will oversee training. The internal trainers will consist of seven production managers and seven supervisor leads who will provide role-specific training to ensure all employees have the necessary skills to do their jobs.</p> <p>Tomatek's training staff are aware of ETP requirements and will work with the Human Resource Manager to deliver training and maintain documentation compliant to ETP record keeping guidelines.</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

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1 will receive training applicable to their jobs in Business, Computer, Continuous Improvement, Management, and Manufacturing topics listed under Attachment 2.	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

Provided here are the waivers and their descriptions that apply to this Panel Proposal.

Waivers	Description
Retention Period for Seasonal Employees	<p>The Panel funds training for Seasonal Workers to increase employment retention and productivity in all cycles of crop production including harvesting, packing, processing, and transportation.</p> <p>Tomatek manufacturing of products is seasonal. The season begins in early July and concludes in the end of October. There are 219 eligible seasonal trainees (Group 2). Seasonal employees regularly work 500 hours by two and a half months into the season, which would satisfy ETP retention requirements. The majority of seasonal staff are re-hires from the prior season.</p> <p>The Company has held 2 prior ETP Agreements within the past 10 years in which seasonal staff were a large component. In both Agreements, performance of seasonal training and retention met ETP performance requirements (100% in ET08-0439 and 76% in ET09-0576).</p> <p>Tomatek is requesting for Seasonal workers (Group 2) the Alternate Retention Period of 500 working hours within the 12 months following training with up to three employers in the crop production industry.</p>

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

N/A

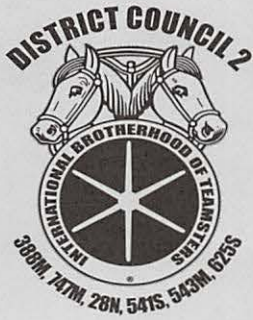
4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	5 Why Training and Problem Solving
	Better Process School
	Dealing with Difficult People
	General MicroBiology
	SQF Internal Audit
	Trend Analysis Training
Computer Skills (Standard)	Microsoft Office - Intermediate and Advance
	People Soft - ERP planning software
Continuous Improvement Skills	Arc Flash Training
	Basic Pump and Mechanical Seal Training
	Cleaver Brooks Systems Plus
	Leadership Skills
	Predictive Maintenance and Condition Monitoring
	Root Cause Analysis
	Scanning Systems
	Scanning Systems - Incoming material and substance identifier
	Studio5000 Control Logix Fundamentals and Trouble
	Team Building Skills
	Time Management and prioritization
Management Skills	First Time Supervisor Skills
	Supervisor Responsibilities
Manufacturing Skills (ME) (Standard)	Critical Control Points (CCP) training
	Electrical Training for mechanics
	Forklift operation
	Global Food Safety Initiative (GFSI)
	Hazard Analysis for CCP
	Preventative Controls Qualified Individual (PCQI)
	Preventative Maintenance for Work Orders
	Product/Sensory Training
	Safe Quality Food (SQF) audit
	Thermal Process - sterilizers and flash coolers



TEAMSTERS DISTRICT COUNCIL 2

17-0696

Affiliated with the Graphic Communications Conference-International Brotherhood of Teamsters

Affiliated Local Unions 388M, 747M, 28N, 541S, 543M, 625S

Main Business Office

710 E. Commonwealth Avenue, Fullerton, CA 92831-3842
(714) 447-3382 Fax (714) 447-3385 (800) 333-4388

Northern California/Colorado/Utah/Nebraska

6111 Southfront Rd., Suite R, Livermore, CA 94551
(925) 960-1295 (925) 960-1297 Fax (925) 960-1285 (800) 333-4388

Oregon/Washington/Idaho

2233 N. Lombard, Portland, OR 97217-5737
(503) 285-0529 Fax (503) 283-4801 (800) 333-4388

April 12, 2017

Felicia Knighton, Senior HR Manager
The Neil Jones Food Company
2502 N Street
Firebaugh, CA 93622

Dear Ms. Knighton:

This letter is to advise you that the Teamsters District Council 2 concurs with the proposed Employment Training Panel Program for their workers at The Neil Jones Food dba Tomatek.

Sincerely,

Fernando Aguilera
General Representative

FA:tv





**Training Proposal for:
California Manufacturing Technology Consulting**

Agreement Number: ET18-0145

Panel Meeting of: December 8, 2017

ETP Regional Office: North Hollywood

Analyst: M. Paccarelli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100	Industry Sector(s):	Manufacturing Aerospace and Defense Biotechnology/Life Sciences Engineering Technology/Other Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Statewide	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$888,640		\$61,050 8%		\$949,690

In-Kind Contribution:	50% of Total ETP Funding Required	\$723,753
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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., Mgmt. Skills, Business Skills, Computer Skills, Mfg. Skills, Literacy Skills	315	8-200	0	\$616	\$16.16
				Weighted Avg: 32			
2	Retrainee Priority Rate SB<100	Continuous Impr., Mgmt. Skills, Business Skills, Computer Skills, Mfg. Skills, Literacy Skills	850	8-200	0	\$889	\$16.16
				Weighted Avg: 32			

Minimum Hourly Wage by County: \$17.63 for Alameda, Contra Costa, Marin, San Francisco, San Mateo and Santa Clara Counties; \$16.96 for Los Angeles County; \$17.22 for Orange County; \$16.72 for San Diego County; \$16.46 for Sacramento County, \$16.16 for all other counties.

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

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

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

Wage Range by Occupation		
Occupation Titles	Wage Range	Estimated # of Trainees
Administrative Staff		180
Technical Staff		200
Production Staff		350
Sales Staff		200
Frontline Supervisor		150
Manager		65
Owner (Job Number 2)		20

INTRODUCTION

California Manufacturing Technology Consulting (CMTC) (www.cmtc.com) was established in 1992 as a private non-profit corporation, affiliated with the US Department of Commerce, National Institute of Standards and Technology, and Hollings Manufacturing Extension Partnership to assist small and medium-sized manufacturers in California to improve operational efficiencies and global competitiveness. Its mission is to create solutions for manufacturing growth and profitability supporting a thriving manufacturing sector in the State of California.

Participating employers are mostly small manufacturers that represent a cross section of manufacturing sectors. Many are suppliers to Original Equipment Manufacturers. In 2016, CMTC served more than 1,000 small manufacturers primarily located in Southern California. The majority of these businesses have 100 or fewer employees and a significant number have under 50 employees. These companies are challenged to stay competitive and relevant in the supply chain.

PROJECT DETAILS

Employer Demand

This will be CMTC's 18th ETP Agreement, and the seventh within the last five years. CMTC engages companies from all manufacturing sectors including aerospace and defense, energy, food and beverage, consumer, automotive, computer and electronics, plastics and rubber, medical device, and industrial. The training and consulting assistance its clients receive supports increased sales, investment and profits, creates and retains jobs, and improves productivity for business growth. The "core" group of employers consists of those in the priority industries and represents over 80% of the requested funding. Workers require training on the latest advanced manufacturing technologies and, in some cases, basic lean and quality processes to ensure workers have the skills needed to increase productivity and product quality.

Curriculum Development

CMTC surveys California manufacturers to identify key barriers to growth, and the results are used to develop its curriculum. As part of the Manufacturing Extension Partnership (MEP) system, CMTC has the benefit of securing national and regional data on industry trends and needs. Most updates to its curriculum come from the feedback and efforts of the national system. As an example, CMTC is currently participating in the development of new basic training modules for smart manufacturing. Work with community college partners to develop new curriculum is another method CMTC uses to incorporate new industry trends and technologies into our program.

Employer and trainee feedback is obtained regularly. Trainees submit course evaluations to trainers, while CMTC account managers meet with clients to review evaluations and ensure that program goals are being met. As a MEP Center, all clients are surveyed by an independent third party within six to twelve months after training ends to quantify impact from CMTC services and measure customer satisfaction.

Training Plan

Business Skills: Training will be offered to all occupations in communication skills to improve quality customer service to internal and external customers.

Computer Skills: Training will be offered to all occupations in the areas of E-commerce, enterprise and manufacturing management systems and database applications.

Continuous Improvement: Training will be offered to all occupations in teamwork, process improvements, ISO standards, problem solving and related skills.

Management Skills: Training will be offered to Managers, Supervisors and Owners. Training will enable Managers to implement changes and become more effective leaders in high performance workplaces.

Manufacturing Skills: Training will be provided to Production Staff in shop measurements, geometric dimensions and tolerances, blueprint reading, additive manufacturing, smart manufacturing sensors, cyber-physical security, flexible-hybrid electronics and other manufacturing topics. Training will improve productivity, product quality, plant efficiencies, and reduce waste.

Literacy Skills: Training will help improve workers written and verbal communication skills for whom English is a second language. Production Staff must possess literacy skills to comprehend processes and procedures to ensure quality.

Commitment to Training

Employer-initiated, internal training activities vary widely among participating employers. Training within small companies can often be narrowly focused on job-specific skills and provided on an “as needed” basis in an informal setting. Employers generally lack the resources to undertake in-depth training programs that would improve productivity and generate significant growth.

ETP funds will not displace the participating employers’ 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

Approximately 75% of training will be delivered by internal staff. Training vendors with extensive manufacturing expertise will deliver 25% of training. Most trainers have a minimum of 15 years of experience working in a variety of manufacturing environments, including food, aerospace, automotive and other industries.

Marketing and Support Costs

CMTC is solely responsible for marketing this program. Account managers and consultants serve hundreds of manufacturers throughout Southern California every year. They conduct face-to-face visits, identify each client’s goals, design improvement projects, and determine how training will help execute their training plans and achieve their goals.

CMTC has built strong relationships with many partners including City, County and regional economic development agencies; Chambers of Commerce; Industry Associations; Community Colleges and Universities; Small Business Development Centers; Workforce Investment Boards; and One-Stop Centers. Activities include hosting workshops, new program development and expansion, promoting each other’s services, and cross referrals to ensure employers are able to access all available resources. By leveraging these partnerships, CMTC expands the resources available to its customers.

CMTC is requesting, and staff recommends, 8% support costs for employer assessment and recruitment. CMTC program success is based on spending a significant amount of upfront time doing needs assessments, creating action plans, customizing training programs, and ensuring that company leadership is committed to realizing the plan. It will also help ensure that CMTC can invest the time needed to design well-developed training plans so that goals are achieved.

Impact/Outcome

CMTC assists manufacturers to prepare for certification programs that are typically awarded on the basis of training, internal improvement, and certification by a third party upon success. Participating employers could eventually achieve ISO, CE Mark, Continuous Energy Improvement, and Safe Quality Food certifications of completion. These certifications and/or product diversification often lead

to new markets and increased sales, which ultimately help companies grow and provide workforce stability.

Substantial Contribution

CMTC serves large and small companies, some of which may have received training in prior ETP contracts. If a large participating employer (over 100 full-time employees) has received the benefit of training with payment earned in excess of \$250,000 within the past five years, reimbursement for trainees at the same facility will be reduced by 15% to reflect that employer’s substantial contribution to the cost of training. Funding for any employer that has previously been assessed a substantial contribution will be reduced by 30%. Small businesses with 100 or fewer full-time employees are not subject to this provision.

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 CMTC under an active ETP Agreement:

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET17-0254	\$949,850	11/01/16-10/31/18	850	618	135

Based on the ETP Systems, 27,209 reimbursable hours have been tracked for potential earnings of \$704,580 (74% of approved amount). The Contractor projects final earnings of 100% based on training committed and in progress with current participating employers by January 2018.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned
ET16-0116	Statewide	08/01/15-07/31/17	\$1,199,745	\$1,199,745 (100%)
ET15-0139	Statewide	07/07/14 - 07/06/16	\$1,249,997	\$1,249,997 (100%)
ET13-0356	Statewide	05/01/13 - 04/30/15	\$849,940	\$849,940 (100%)
ET12-0333	Statewide	04/02/12 - 04/01/14	\$748,748	\$748,748 (100%)

ET11-0225	Statewide	05/02/11 - 05/01/13	\$399,833	\$399,687 (99%)
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DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

The following vendors have been retained to provide training:

Soldering.Biz (Los Alamitos) – Manufacturing Skills
FLEX LLC (Carlsbad) – Computer Skills

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:

CONTINUOUS IMPROVEMENT

- Teams and Team Building
- Problem Solving
- Communication Skills
- Leadership Skills
- Leading Change
- Lean Manufacturing
- Implementing ISO 9001
- Implementing TS16949
- Implementing AS9100
- Implementing ISO 14001
- Implementing ISO 5001
- Safe Quality Food
- Environmental Management System Implementation
- Continuous Energy Improvement
- Six Sigma
- Design of Experiments
- Failure Mode and Effects Analysis
- Statistical Process Control
- Quality Function Deployment and New Management & Planning Tools
- Improving Process Cycle Times
- Quality Management Systems
- Quality Inspection
- Risk Management
- Supply Chain Optimization
- Production and Inventory Management
- Integrated Resource Management

MANAGEMENT SKILLS (Managers/Supervisors Only)

- Management/Supervisory Skills
- Family Business Management
- Strategic Planning and Policy Deployment

BUSINESS SKILLS

- Sales Skills
- Business Writing
- Conflict Management
- Effective Meeting Skills
- Financial Analysis Skills
- Goal Setting
- Project Management
- Negotiation Skills
- Presentation Skills

- Providing Quality Customer Service
- Time Management Skills
- Global Business and Exporting
- Innovation Engineering Management Systems
- New Product Development
- Technology Driven Market Intelligence

COMPUTER SKILLS

- Enterprise Resource Planning
- Electronic Commerce and eBusiness
- Word Processing (Intermediate & Advanced Level)
- Spreadsheets (Intermediate & Advanced Level)
- Presentation Software
- Database Management
- CAD/CAM Software Training
- SolidWorks

MANUFACTURING SKILLS

- Programmable Logic Controllers
- Soldering
- Blueprint Reading
- Shop Math and Geometric Dimensioning & Tolerancing
- CNC Programming
- Additive Manufacturing
- Surface Mount Technology: Manufacturing & Rework
- Printed Wiring Board Repair
- Through Hole Technology: Rework and Repair
- Sewing
- Productions Skills
- FDA Good Manufacturing Practices
- Small Batch Manufacturing
- Large Batch Manufacturing
- Clean Room Technology
- Writing Standard Operating Procedures
- Biotechnology Design Control
- Product Submissions: Getting to Market
- Quality System Requirements, Good Manufacturing Practices & Inspections
- Medical Devices and the European Market
- Requirements for Device Safety
- Manufacturing Logistics Management
- Value Energy Stream Mapping
- Smart Manufacturing Sensors
- Cyber-Physical Security
- Flexible-Hybrid electronics
- Robotics

LITERACY SKILLS

- Vocational English as a Second Language

Literacy skills training will not exceed 45% of total training hours per trainee

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET18-0145
Reference No: 18-0018 Page 1 of 8

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Able Industrial Products Inc.

Address: 2006 South Baker Ave.

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 30

Total # of full-time company employees worldwide: 60

Total # of full-time company employees in California: 48

Company: California Air Tools, Inc.

Address: 8560 Siempre Viva Rd., Unit 3

City, State, Zip: San Diego, CA 92154

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 18

Total # of full-time company employees worldwide: 18

Total # of full-time company employees in California: 18

Company: Carbon by Design, LLC

Address: 4128 Avenida De La Plata

City, State, Zip: Oceanside, CA 92056

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 14

Total # of full-time company employees worldwide: 75

Total # of full-time company employees in California: 75

Company: Dramm & Echter, Inc.

Address: 1150 Quail Gardens Drive

City, State, Zip: Encinitas, CA 92023

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 96

Total # of full-time company employees in California: 96

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET18-0145
Reference No: 18-0018 Page 2 of 8

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: ecoATM Gazelle, LLC

Address: 10121 Barnes Canyon Rd.

City, State, Zip: San Diego, CA 92124

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 30

Total # of full-time company employees worldwide: 306

Total # of full-time company employees in California: 190

Company: H & H Specialties, Inc.

Address: 14850 Don Julian Rd., Ste. B

City, State, Zip: City of Industry, CA 91746

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 27

Total # of full-time company employees in California: 27

Company: Hayden Products, LLC

Address: 1393 E. San Bernardino Ave.

City, State, Zip: San Bernardino, CA 92408

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 56

Total # of full-time company employees in California: 56

Company: Kelco Sales & Engineering

Address: 11936 Front St.

City, State, Zip: Norwalk, CA 90650

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 9

Total # of full-time company employees worldwide: 13

Total # of full-time company employees in California: 13

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET18-0145
Reference No: 18-0018 Page 3 of 8

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Lee Kum Kee (USA) Inc.

Address: 14815 Don Julian Road

City, State, Zip: City of Industry, CA 91746

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 72

Total # of full-time company employees worldwide: 332

Total # of full-time company employees in California: 74

Company: Lee Kum Kee Inc.

Address: 14815 Don Julian Road

City, State, Zip: City of Industry, CA 91746

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 222

Total # of full-time company employees worldwide: 332

Total # of full-time company employees in California: 296

Company: Lustre-Cal Nameplate Corp.

Address: 715 S. Guild Avenue

City, State, Zip: Lodi, CA 95240

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 22

Total # of full-time company employees worldwide: 62

Total # of full-time company employees in California: 62

Company: Marking Methods, Inc.

Address: 301 S. Raymond Ave.

City, State, Zip: Alhambra, CA 91803

Collective Bargaining Agreement(s): No

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET18-0145
Reference No: 18-0018 Page 4 of 8

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Maury Microwave Corporation

Address: 2900 Inland Empire Blvd.

City, State, Zip: Ontario, CA 91764-4804

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 25

Total # of full-time company employees worldwide: 100

Total # of full-time company employees in California: 100

Company: Microtek, Inc.

Address: 10865 Rancho Bernardo Rd., Suite 1

City, State, Zip: San Diego, CA 92127

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 6

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

Company: Mist Incorporated dba Mist Industrial Tools

Address: 9006 Fullbright Avenue

City, State, Zip: Chatsworth, CA 91311

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 25

Total # of full-time company employees in California: 25

Company: MWS Precision Wire Industries, Inc.

Address: 31200 Cedar Valley Dr.

City, State, Zip: Westlake Village, CA 91362

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 37

Total # of full-time company employees worldwide: 43

Total # of full-time company employees in California: 43

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET18-0145
Reference No: 18-0018 Page 5 of 8

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Newton Heat Treating

Address: 19235 E. Walnut Dr., North

City, State, Zip: Rowland Heights, CA 91748-1438

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 45

Total # of full-time company employees worldwide: 72

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

Company: Nicotine River LLC

Address: 1825 Surveyor Avenue, #103

City, State, Zip: Simi Valley, CA 93063-3383

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 25

Total # of full-time company employees in California: 25

Company: Noma Bearing Corp.

Address: 1555 W. Rosecrans Ave.

City, State, Zip: Gardena, CA 90249

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 13

Total # of full-time company employees in California: 13

Company: Northridge Tri-Modality Imaging dba TriFoil Imaging

Address: 9457 De Soto Ave.

City, State, Zip: Chatsworth, CA 91311

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 23

Total # of full-time company employees in California: 17

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET18-0145
Reference No: 18-0018 Page 6 of 8

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Nuconic Packaging

Address: 4889 Loma Vista Ave.

City, State, Zip: Vernon, CA 90058

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 18

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Company: Nutrawise Health and Beauty Corporation

Address: 9600 Toledo Way

City, State, Zip: Irvine, CA 92618-1808

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 97

Total # of full-time company employees in California: 97

Company: Performance Materials Corporation dba Tencate Performance Composites

Address: 1150 Calle Suerte

City, State, Zip: Camarillo, CA 93012-8051

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 30

Total # of full-time company employees worldwide: 145

Total # of full-time company employees in California: 48

Company: PK Engineering & Manufacturing

Address: 200 East Shell Rd., Suite B2

City, State, Zip: Ventura, CA 93001

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 4

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: California Manufacturing Technology Consulting CCG No.: ET18-0145
Reference No: 18-0018 Page 7 of 8

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Pulse Instruments

Address: 1234 Francisco St.

City, State, Zip: Torrance, CA 90502

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 11

Total # of full-time company employees worldwide: 13

Total # of full-time company employees in California: 13

Company: RadiaBeam Technologies, LLC

Address: 1717 Stewart Street

City, State, Zip: Santa Monica, CA 90404

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 23

Total # of full-time company employees worldwide: 45

Total # of full-time company employees in California: 43

Company: Repairtech

Address: 16134 Saticoy

City, State, Zip: Van Nuys, CA 91406

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 37

Total # of full-time company employees in California: 37

Company: Rico International dba D'Addario & Company Inc.

Address: 8484 San Fernando Rd.

City, State, Zip: Sun Valley, CA 91352

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 65

Total # of full-time company employees worldwide: 153

Total # of full-time company employees in California: 95

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: California Manufacturing Technology Consulting CCG No.: ET18-0145
Reference No: 18-0018 Page 8 of 8

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Robert M. Hadley Co., Inc.

Address: 4054-B Transport St.

City, State, Zip: Ventura, CA 93003

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 95

Total # of full-time company employees in California: 95

Company: Sonfarrel, Inc.

Address: 3010 La Jolla Street

City, State, Zip: Anaheim, CA 92806

Collective Bargaining Agreement(s): No

Estimated # of employees to be retrained under this Agreement: 60

Total # of full-time company employees worldwide: 105

Total # of full-time company employees in California: 105

Company: Varedan Technologies LLC

Address: 3860 Del Amo Blvd., #401

City, State, Zip: Torrance, CA 90503

Collective Bargaining Agreement(s): No

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

Total # of full-time company employees worldwide: 9

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



Training Proposal for:

Mt. San Antonio College

Agreement Number: ET18-0147

Panel Meeting of: December 8, 2017

ETP Regional Office: North Hollywood

Analyst: M. Paccereilli

PROJECT PROFILE

Contract Attributes:	Retrainee Priority Rate SB <100 HUA	Industry Sector(s):	Manufacturing Wholesale Trade Goods Movement Transportation/Logistics Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, Riverside, San Bernardino	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	≤20%		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$257,125		\$17,814 8%		\$274,939

In-Kind Contribution:	50% of Total ETP Funding Required	\$222,730
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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 Priority Rate	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmt. Skills, Literacy Skills	12	8-200	0	\$1,058	\$16.16
				Weighted Avg: 55			
2	Retrainee	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmt. Skills, Literacy Skills	5	8-200	0	\$882	\$16.16
				Weighted Avg: 55			
3	Retrainee Priority Rate SB<100	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmt. Skills, Literacy Skills	95	8-200	0	\$1,529	\$16.16
				Weighted Avg: 55			
4	Retrainee SB<100	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmt. Skills, Literacy Skills	75	8-200	0	\$1,294	\$16.16
				Weighted Avg: 55			
5	Retrainee HUA SB<100	Business Skills, Computer Skills, Cont. Imp., Mfg. Skills, Mgmt. Skills, Literacy Skills	12	8-200	0	\$1,294	\$12.12
				Weighted Avg: 55			

Minimum Hourly Wage by County: Job Numbers 1-4: \$16.96 for Los Angeles County; \$17.22 for Orange County; \$16.16 for Riverside and San Bernardino Counties. **Job Number 5 (HUA):** \$12.72 for Los Angeles County; \$12.92 for Orange County; and \$12.12 for Riverside and San Bernardino Counties.

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

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

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

Wage Range by Occupation		
	Wage Range	Estimated # of Trainees
Job Numbers 1-4		
Production/Warehouse Staff		70
Office/Administrative Staff		94
Manager		13
Supervisor		8
Owner (Job Numbers 3-4 only)		2
Job Number 5		
Production/Warehouse Staff		5
Office/Administrative Staff		2
Manager		2
Supervisor		2
Owner		1

INTRODUCTION

The Mt. San Antonio College (MTSAC) (www.mtsac.edu) was created in 1945 as a community college district providing more than 200 academic and vocational programs. It is the largest, single-campus community college district in California with a combined student enrollment (Credit, Continuing Education and Community Service) of over 65,000. Its district boundaries encompass the communities of Baldwin Park, Bassett, Charter Oak, Covina, Diamond Bar, the southern portion of Glendora, Hacienda Heights, City of Industry, Irwindale, La Puente, La Verne, Pomona, Rowland Heights, San Dimas, Valinda, Walnut and West Covina.

In addition, MTSAC is an approved workforce training provider on the I-Train system providing education and training for the Los Angeles County Worksource Centers' clients or professionals in transition.

MTSAC is eligible to contract with ETP as a community college. The College proposes to retrain incumbent workers from large and small employers to meet the business needs from a wide variety of industries, the majority of which are Panel priorities and meet the Panel's out-of-state competition criteria.

PROJECT DETAILS

Employer Demand

This will be MTSAC's third ETP Agreement, and the third within the last five years. Area businesses must compete nationally and internationally by producing and delivering quality products and services in a cost effective manner to satisfy customer needs. To do this, employers are adopting new business practices, incorporating new technology, and becoming leaner and more efficient through continuous improvement strategies.

Under this proposal, participating employers will include large and small manufacturers, wholesalers, and service companies with out-of-state competition. Employers belong to both priority industry sectors, such as manufacturing, goods movement, and transportation logistics and non-priority

sectors, such as wholesale trade and other services. The “core” group of employers represents over 60% of requested funding, the majority of which are small businesses.

The proposed training is designed to provide participating employers a competitive edge to rebuild California businesses to compete nationally and internationally; and assist them in adapting to new practices and challenges brought in by the steady return of manufacturing to the State.

Business Skills: Training will be offered to Administration and Office Staff to improve strategic and financial planning; standardize processes; enhance internal and external customer service; and develop time, project, and resource management skills.

Computer Skills: Training will be offered to all occupations in new and upgraded software to expedite work, improve accuracy, and connect to company-wide operating systems with inter-dependent functions.

Continuous Improvement: Training will be offered to all occupations in teamwork skills, improve workflow, and troubleshoot and resolve problems.

Manufacturing Skills: Training will be offered to Production and Warehouse Workers to operate new equipment, cross-train for flexibility, and move product expeditiously through production, shipping, and receiving processes.

Management Skills: Training will be offered to Managers and Supervisors with the skills needed to undertake strategic planning, implement change, and become more effective leaders to motivate and coach workers in a high performance workplace.

Literacy Skills: Training will be provided to Production and Warehouse Staff to overcome communication problems with their peers and management, and better understand written/verbal instructions and workplace documentation. VESL courses will enable trainees to participate in larger group training programs delivered principally in English, interact in teams, improve job skills, and increase promotional opportunities.

Curriculum Development

MTSAC has historically provided continuing education to incumbent workers in a wide array of area businesses. The ETP curriculum was developed by college personnel based on findings from employer needs assessments and industry focus groups. Staff continuously updates the curriculum to keep pace with the evolving technologies and industry trends. Trainers provide input from trainee evaluation forms for every class and 60 and 90-day follow-up meetings are held with employers to evaluate the effectiveness of the training.

Each employer’s training curriculum is based on assessment of its specific business needs. MTSAC’s Project Managers work with employers to customize curriculum, select classes and instructors, and develop a schedule.

Commitment to Training

ETP funds will not displace participating employers existing financial commitment to training. Due to lack of training budgets and limited time and resources, participating employers have provided little prior training, except for basic job skills and mandatory requirements. Some employers have a small training budget, and the number of participants and the scope of the training are very limited. Most of the training is introductory only, and generally not comprehensive enough to generate

company-wide results. 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

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

Marketing and Support Costs

MTSAC personnel market and advertise training programs through Focus Groups with Local Businesses; Chambers of Commerce and telemarketing. The college provides a semi-annual Community Education catalog and marketing materials upon request. In particular, the College works with the San Gabriel Valley Economic Partnership, Employment Advisory Council, San Gabriel Regional Chamber of Commerce, La Verne Chamber of Commerce, Pomona Chamber of Commerce, and the Industry Manufacturers Council.

As a non-profit entity, MTSAC relies heavily on support funding to promote ETP training and facilitate individual employer meetings to discuss ETP requirements, assess training needs, and complete and process ETP Certification Statements. Therefore, MTSAC is requesting ETP's standard 8% support cost for additional employer marketing, recruitment, and assessment. The initial core employer list is small, but MTSAC will continue to contact employers and offer training to develop the program locally. Since marketing time and materials are needed for this endeavor, ETP staff recommends the Support Costs.

High Unemployment Area

The 12 trainees in Job Number 5 work in High Unemployment Areas (HUA), with unemployment exceeding the state average by at least 25%. The participating employees who qualify are located in Los Angeles, Orange, Riverside and San Bernardino Counties.

➤ Wage Modification

MTSAC is requesting the HUA waiver for trainees in Job Number 5 from the standard ETP wages to \$12.72 for Los Angeles County; \$12.92 for Orange County; and \$12.12 for Riverside and San Bernardino Counties. 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.

Tuition Reimbursement

Students enrolled in 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.

ACTIVE PROJECTS

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

Agreement No.	Approved Amount	Term	No. Trainees (Estimated)	No. Completed Training	No. Retained
ET16-0386	\$205,327	04/04/16- 04/03/18	218	177	114

Based on the ETP Systems, 8,347 reimbursable hours have been tracked for potential earnings of \$201,220 (98% of approved amount). The Contractor projects final earnings of 100% based on training committed until the end of Dec 2017.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned
ET14-0324	Statewide	05/05/14- 05/04/16	\$88,029	\$69,134 (79%)

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

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

8-200

Trainees may receive any of the following:

BUSINESS SKILLS

- ✚ Communication Skills
- ✚ Conflict Management
- ✚ Cost Reduction
- ✚ Customer Service
- ✚ Decision-Making
- ✚ Finance for the Non-Financial Manager
- ✚ Group Effectiveness
- ✚ Interpersonal Skills
- ✚ Negotiation
- ✚ Personal Effectiveness
- ✚ Planning
- ✚ Product Knowledge
- ✚ Project Management
- ✚ Telephone Skills
- ✚ Time Management

COMPUTER SKILLS

- ✚ Budgeting Software
- ✚ Company-Specific Software
- ✚ Computer Networking
- ✚ Document Control
- ✚ Enterprise Resource Planning Software
- ✚ Managing E-mail
- ✚ Microsoft Office (Intermediate & Advanced)
- ✚ MS Project
- ✚ Inventory Control
- ✚ Payroll Software
- ✚ Purchase Order Tracking
- ✚ Shipping Solutions and Related Logistic Software
- ✚ World Wide Web

CONTINUOUS IMPROVEMENT

- ✚ Basic Logistics Standard Practices
- ✚ Cost and Analysis
- ✚ Inventory Control
- ✚ ISO 9000
- ✚ Leadership Skills for Frontline Workers
- ✚ Lean Manufacturing/Operations
- ✚ Planning
- ✚ Problem Solving
- ✚ Process Corrective Action
- ✚ Scheduling and Planning
- ✚ Six Sigma
- ✚ Strategic Planning
- ✚ Supply Chain Elements

- ✚ Teambuilding
- ✚ Time Studies & Line Balancing
- ✚ Total Quality Management

MANAGEMENT SKILLS (Managers/Supervisors/Owners Only)

- ✚ Change Management
- ✚ Coaching/Motivating Employees
- ✚ Conflict Management
- ✚ Essential Interviewing Techniques
- ✚ Leadership for Managers
- ✚ Managing a High Performance Workplace
- ✚ Supervisor/Lead Role
- ✚ Understanding Work Group Dynamics

MANUFACTURING SKILLS

- ✚ Manufacturing Resource Planning/Material Resource
- ✚ Assembly Procedures
- ✚ Equipment Operation
- ✚ Food Processing
- ✚ Manufacturing Practices
- ✚ Production Operation
- ✚ Safety
- ✚ Shop Math
- ✚ Warehousing
- ✚ Welding

LITERACY SKILLS

- ✚ Vocational English as a Second Language
 - Language Comprehension
 - Communicating with Co-Workers
 - Reading Letters and Reports
 - Understanding Numbers
 - Understanding Verbal Direction and Instruction
 - Writing Letters and Reports

Safety hours are capped at 10% of a trainee's total training hours.
Literacy hours are capped at 45% of a trainee's total training hours.

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

**Participating Employers in Retrainee
Multiple Employer Contracts**

Contractor's Name: Mt. San Antonio College

CCG No.: ET18-0147

Reference No: 18-0019

Page 1 of 3

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Able Industrial Products

Address: 2006 S. Baker Avenue

City, State, Zip: Ontario, CA 91761

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 75

Total # of full-time company employees in California: 43

Company: AmTram Logistics/ASEV Display Lab

Address: 9 Goddard

City, State, Zip: Irvine, CA 92618

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 44

Total # of full-time company employees in California: 44

Company: Autotelic Inc.

Address: 17870 Castleton St., Suite 250

City, State, Zip: City of Industry, CA 91748

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 30

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 32

Company: Fatboy Garage Motorsport

Address: 2518 Continental Ave.

City, State, Zip: El Monte, CA 91733

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 10

Total # of full-time company employees worldwide: 18

Total # of full-time company employees in California: 18

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Mt. San Antonio College

CCG No.: ET18-0147

Reference No: 18-0019

Page 2 of 3

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: Hellwig Products Co. Inc.

Address: 16237 Avenue 296

City, State, Zip: Visalia, CA 93292

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 49

Total # of full-time company employees in California: 49

Company: Import Direct Inc. dba Furniture of America California Inc.

Address: 19605 E. Walnut Dr., N

City, State, Zip: City of Industry, CA 91789

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 25

Total # of full-time company employees worldwide: 95

Total # of full-time company employees in California: 95

Company: K2 Motor Corp/Spec D

Address: 21901 Ferrero Pkwy.

City, State, Zip: City of Industry, CA 91789

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 25

Total # of full-time company employees worldwide: 87

Total # of full-time company employees in California: 87

Company: Morehouse Foods

Address: 760 Epperson Dr.

City, State, Zip: City of Industry, CA 91748

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 15

Total # of full-time company employees worldwide: 30

Total # of full-time company employees in California: 30

Participating Employers in Retrainee Multiple Employer Contracts

Contractor's Name: Mt. San Antonio College

CCG No.: ET18-0147

Reference No: 18-0019

Page 3 of 3

PRINT OR TYPE IN ALPHABETICAL ORDER

Company: MED-LEGAL LLC

Address: 955 Overland Ct., Ste 200

City, State, Zip: San Dimas, CA 91733

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 40

Total # of full-time company employees worldwide: 215

Total # of full-time company employees in California: 215

Company: PCV Murcor

Address: 740 Corporate Center Drive

City, State, Zip: Pomona, CA 91768

Collective Bargaining Agreement(s): N/A

Estimated # of employees to be retrained under this Agreement: 25

Total # of full-time company employees worldwide: 189

Total # of full-time company employees in California: 189

Company: RGE Motor Direct Inc.

Address: 19301 E. Walnut Drivel, North

City, State, Zip: City of Industry, CA 91748

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 35

Total # of full-time company employees in California: 35

Company: Sonic Lighting,Inc. dba Spyder Auto

Address: 19395 E. Walnut Drive, North

City, State, Zip: City of Industry, CA 91748

Collective Bargaining Agreement(s): N/A

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

Total # of full-time company employees worldwide: 78

Total # of full-time company employees in California: 78



Training Proposal for:
**Southern California Roofers and Waterproofers Joint
 Apprenticeship and Training Fund**

Agreement Number: ET18-0920

Panel Meeting of: December 8, 2017

ETP Regional Office: North Hollywood

Analyst: M. Reeves

PROJECT PROFILE

Contract Attributes:	Retrainee Apprenticeship Priority Rate	Industry Sector(s):	Construction Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Los Angeles, Orange, Riverside, Ventura, San Bernardino, 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 United Union of Roofers, Waterproofers and Allied Workers - Local Unions 36 and 220		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$420,728		\$29,073 8%		\$449,801

In-Kind Contribution:	50% of Total ETP Funding Required	Inherent
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TRAINING PLAN TABLE

Job No.		Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee Apprentice	Commer'l Skills, Computer Skills, Literacy Skills, OSHA 10/30	287	8-210	0	\$1,223	\$22.04
				Weighted Avg: 88			
2	Retrainee Journeyman Priority Rate	Comm'l Skills, Computer Skills, HazMat, HAZWOPER, Literacy Skills, OSHA 10/30	200	8-200	0	\$494	\$22.04
				Weighted Avg: 21			

Minimum Wage by County: \$22.04 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 \$4.81 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
Apprentice Roofer/Waterproofers		287
Journeyman Roofer/Waterproofers		200

INTRODUCTION

Founded in 1959, the Southern California Roofers and Waterproofers Joint Apprenticeship and Training Fund (SoCal Roofers and Waterproofers JATF), is responsible for approximately 500 Apprentices and 700 Journeymen in Southern California. Training includes multiple aspects of the industry such as tiles, shingles, solar panels, damp proofing, integrated photovoltaic, solar roof tiles, metal roofing, and waterproofing systems.

SoCal Roofers and Waterproofers JATF operates three training centers located Pomona, Riverside and Mission Hills. This program is governed by a joint labor-management committee. The Board of Trustees is comprised of an equal number of Employer and Union Trustees. Participating Employers and the association of the JATC continue to support participation in ETP projects to fund training for union workers.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). 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 \$18 to \$13 per hour. In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤ 100 employees). This is \$22 per hour, midway between the Priority Industry standard rate (\$18) and Small Business rate (\$26).

The ETP wage for Apprentices and Journeymen is no less than \$22.04 per hour, tracking the Special Employment Training wage as modified for priority industries.

PROJECT DETAILS

SoCal Roofers and Waterproofers JATF must maintain and improve the skill sets of Journeymen and Apprentice workers. There is also a growing need to develop skilled craftsmen to replace workers who will be retiring over the next few years. Environmental changes continue to create a need for training in new technologies such as rainwater harvesting, vector mapping, flood testing, Green roofing, and various waterproofing/damp proofing applications. Journeymen will also receive training in Hazardous Materials and HAZWOPER to address safety issues encountered when working more complex jobs.

Training Plan

Training will result in certifications to work in the Roofing and Waterproofing industry. Courses will include Coreflex, Air Barrier, Roofing Systems, Hazardous Materials, Green/Renewable Energy Systems, Flood Testing Technology, and Water Recapturing Systems.

Commercial Skills: Training will be offered to Apprentice and Journeymen to develop and enhance skill sets required to earn certification in the roofing industry. Trainees will learn to identify products and materials, insulation methods, and other application techniques.

Computer Skills: Training will be offered to all occupations to ensure workers are able to utilize computer tracking systems, create reports, and use computer programs in Microsoft Office (Excel, Word, Outlook).

Literacy Skills: Training will be offered to all occupations who speak English as a second language (VESL). Curriculum provided will focus on vocabulary, as well as equipment and safety standards used in the roofing industry.

OSHA 10/30: OSHA 10/30 training will be provided to Apprentices and Journeymen. Training will ensure workers are versed in the prevention of health hazards and safety in workplaces.

Hazardous Materials: This training will be offered to Journeymen and includes environmental management skills for staff that develops and administer plans/systems for handling hazardous materials and industrial waste.

HAZWOPER: Training will be offered to Journeymen. Training may include site assessment, hazard recognition, material sampling, protective equipment, proper handling of hazardous materials, radiological hazards, and treatment of hazard exposure.

Certified Safety Training

1. OSHA 10/30: This training is a series of courses “bundled” by industry sector and occupation. It consists of 10 hours of classroom or CBT training for journey-level workers and 30 hours for frontline supervisors. The coursework is geared to construction and manufacturing. Completion of 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 training results in a certificate that expands employment opportunities. Each certification requires an 8-hour annual refresher course. This coursework must be approved by Cal-OSHA, and the instructors must be certified by Cal-OSHA.
3. Hazardous Materials (HAZMAT): This training is also a series of courses, specific to industry sectors involved in the transport of hazardous materials. The coursework varies in length depending on the industry and the occupational title, as organized in five levels ranging from “first responder” to “incident commander.” It is generally a minimum of 24 hours with an 8-hour annual refresher, and may be delivered by classroom or CBT. In this proposal, Journeymen will receive up to 40 hours of training. Field training may be required, although not funded by ETP. Completion of training results in a certificate that expands employment opportunities. This coursework is not under Cal-OSHA, but is administered under the Department of Transportation and CalTRANS. There are various certification entities for the coursework and instructors. In this proposal, certification is by certified trainers.

Commitment to Training

Employers will continue to contribute to the training association for every hour worked by employees. Safety training is provided in accordance with all pertinent requirements under state and federal law.

➤ Training Infrastructure

SoCal Roofers and Waterproofers JATF has a designated staff member to oversee administration for this project. This individual has experience with ETP requirements and has effectively

administered prior Agreements. Staff will schedule training, collect all training rosters, perform data entry, and maintain contact with ETP throughout the duration of the contract.

Marketing and Support Costs

Informational flyers are distributed on an on-going basis in person and via email/postage. Staff also maintains communication with participating employers and the Union Roofing Contractors Association to keep them informed of training opportunities provided through SoCal Roofers and Waterproofers JATF.

To ensure that training meets industry standards, the JATF conducts training evaluations to assess the effectiveness of the program.

SoCal Roofers and Waterproofers JATF requests 8% support costs to assist in recruitment, employer outreach, and assessment of employer-specific job requirements. Assessments and recruitment will take place throughout the term of the Agreement. Staff recommends the 8% support costs.

Trainer Qualifications

All trainers are Journeyman subject matter experts with up to 30 years of experience in the roofing industry.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

The following table summarizes performance by SoCal Roofers and Waterproofers JATF under ETP Agreements that were completed within the last five years:

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET16-0909	Pomona	09/28/15 – 09/27/17	\$449,332	*TBD
ET14-0907	Pomona	12/23/13 – 12/22/15	\$537,000	\$423,786 (79%)
ET12-0207	Pomona	12/26/11 – 12/25/13	\$335,024	\$284,653 (85%)

*Based on ETP Systems, 45,566 reimbursable hours have been tracked for potential earnings of \$690,449 more than approved amount). The Contractor projects final earnings of 100%, pending fiscal closeout of this Agreement.

DEVELOPMENT SERVICES

N/A

ADMINISTRATIVE SERVICES

N/A

TRAINING VENDORS

N/A

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

8 – 210

Job Number 1

Trainees may receive any of the following:

Apprentice**COMMERCIAL SKILLS**

- **Coreflex**
 - Thermoplastic Waterproofing Membrane with Active Polymer Core
 - Hot-Air Welding
- **Ethylene Propylene Diene Monomer**
 - Emphasis on Seam Details, Wall Details, Pipe Flashings, Curb Flashings, Corners, etc.
- **Built-Up Roofing**
 - Level 3A
 - Level 3B
 - Level 3C
 - Mopping Techniques and Applying of Drains, Curbs, Walls, Scuppers, Felt Machine Operation and Kettle Operation
 - Safety, Tools & Equipment
- **Hot Air Welding**
 - Hot Air Welding of Seams, Curbs, Corners, Pipes, Drains and Machine Operation
- **Modified**
 - Level 2A
 - Level 2B
 - Atactic Polypropylene Torch Applied and Styrene Butadiene Mopped Applied Membranes
 - Drains, Pipe, Curb and Wall Flashings
- **Shingles**
 - Installation of Shingles in a Valley and Around Chimneys, Dormers and through Pipes and Vents
- **Slate & Tile Classes**
 - Proper Steps for Starting and Detailing Slate and Tile Roofs
 - Silica Training
- **Spray Polyurethane Foam**
 - Techniques and Installation Procedures
- **Single Ply**
 - Levels A - B
 - Safety, Tools & Equipment
 - Techniques and Installation of Single Ply
- **GAF Materials**
 - Learn the Latest GAF Materials Heat-Welding details
- **Firestone Building Products**
 - Learn the Latest Specification Requirements for their Roofing ssstems

- **Johns Manville**
 - Heat Welding and Detail Requirements for Manville's Membranes and Various Roofing Systems
- **Sarnafil Roofing Systems**
 - Sarnafils Polyvinyl Chloride, Hot Air Welded Systems and Detail Requirements
- **Soprema**
 - Soprema's Various Roofing Systems
- **Carlisle/Syntec Building Products**
 - Products and Detail Requirements for their Various Roofing Systems
- **Certified Roofing Torch Applicator**
 - Certified Roofing Torch Applicator Program
 - Application Techniques, Known Facts of Propane Gas and Combustion on Torch applied Membranes
- **Certified Roofing Torch Applicator – Recertification**
 - 8-Hour Re-Certification
- **Torch Safety Techniques**
 - Accident Prevention
 - Application Techniques
 - Fire Safety
- **Fall Protection Training**
 - 8-Hour Fall Protection
 - Fall Protection Competent Person
- **Flagger Training**
 - Construction Zone
 - Residential Zone
 - Traffic Zone
- **Scaffold User Training**
 - Code
 - Dismantle
 - Fall Protection Awareness
 - How to Build
 - Safety Guidelines
 - Scaffolding Competent Person
- **Forklift Training & Aerial Work Platform**
 - Aerial Lifts
 - Boom & Scissor Lifts
 - Forklift (Gradall) Certification Class 7
 - Class 4 & 5
- **GHS Labeling**
 - Requirements
 - Signal Words
- **Going Green**
 - Design and Install Equipment for Energy Efficiency
 - Electricity
 - Energy Efficiency for Roofing
 - Green Roof Systems
 - Green Roofs

- History of Solar Energy
- Photovoltaic Cells
- Photovoltaic System & Performance
- Solar Installation
- **Green - Renewable Energy Systems**
 - Green (Vegetated) Roofs
 - Green Roof Systems
 - Rooftop Solar PV
 - Solar PV Systems
- **Electronic Vector Mapping Systems**
 - Membrane Integrity Testing
 - Electronic Leak Detection
- **Water Recapturing Systems**
 - Advantages and Disadvantages
 - Equipment
 - Rain Water Harvesting
- **Flood Testing Technology**
 - Inspection and Testing of Construction Materials
 - Testing Labs
- **Globally Harmonized Systems Training**
 - Acclimation
- **C.P.R & First Aid**
 - Adult CPR
 - AED
 - First Aid
- **Heat Illness Prevention**
 - Outdoor
 - Indoor

OSHA 10/30 (Certified OSHA Instructor)

- **OSHA 10** (Construction Outreach - requires completion of 10 hours)
- **OSHA 30** (Construction Industry - requires completion of 30 hours)

LITERACY SKILLS

- **Vocational English as a Second Language for Roofers & Waterproofers**
 - Entering the Roofing Industry
 - Tools and Equipment
 - Roofing and Waterproofing Vocabulary
 - Safety in the Industry

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

Class/Lab Hours

8 – 200

Job Number 2

Trainees may receive any of the following:

Journeyman**COMMERCIAL SKILLS**

- **Air Barrier - ABAA**
 - Installer Certification Application
 - Application – Self Adhered, Liquid Adhered, Medium Density Membrane, Spray Polyurethane, Mechanically Fasten
- **Coreflex**
 - Thermoplastic Waterproofing Membrane with active Polymer Core
 - Hot-Air Welding
- **Ethylene Propylene Diene Monomer**
 - Emphasis on Seam Details, Wall Details, Pipe Flashings, Curb Flashings, Corners
- **Built-Up Roofing**
 - Mopping Techniques and Applying of Drains, Curbs, Walls, Scuppers, Felt Machine Operation and Kettle Operation
- **Coatings – For the Purpose of Damproofing and Waterproofing**
 - Balconies
 - Deck Coating
 - Equipment Wells
 - Traffic Coating
- **Electronic Vector Mapping Systems**
 - Membrane Integrity Testing
 - Electronic Leak Detection
- **Water Recapturing Systems**
 - Advantages and Disadvantages
 - Equipment
 - Rain Water Harvesting
- **Flood Testing Technology**
 - Inspection and Testing of Construction Materials
 - Testing Labs
- **Green Retrofit**
 - Energy Efficiency Roofs
 - Applications
 - Moisture Treatment
- **Infrared Moisture Detection**
 - Nuclear Surveys
 - Analysis & Visualization of Collected Data
- **Building Envelope Inspection**
 - Below Grade
 - Walls and Windows
 - Roofs
- **Hot Air Welding**
 - Hot Air Welding of Seams, Curbs, Corners, Pipes, Drains, and Machine Operation
- **Insulation**
 - Crickets

- Sound
- Wash Backs
- **Modified**
 - Atactic Polypropylene Torch Applied and Styrene Butadiene Mopped Applied Membranes
 - Drains, Pipe, Curb and Wall Flashings
- **Paver Systems**
 - Ballast Pavers
 - Concrete
 - Rack Systems
 - Stone Ballast
- **Seismic Retrofit**
 - Applications
 - Expansion Joints
 - Strengthen Structures
- **Shingles**
 - Installation of Shingles in a Valley and Around Chimneys, Dormers and through Pipes and Vents
- **Single Ply**
 - Roof Deck Insulations
 - Techniques and Installation of Single Ply
- **Slate & Tile**
 - Proper Steps for Starting and Detailing Slate and Tile Roofs
 - Silica Training
- **Spray Polyurethane Foam**
 - Techniques and Installation Procedures
- **Standing Seam's Application**
 - Detail
 - Field Set-Up
- **GAF Materials**
 - Learn the Latest GAF Materials Heat-Welding Details
- **Firestone Building Products**
 - Learn the Latest Specification Requirements for their Roofing Systems
- **Johns Manville**
 - Heat Welding and Detail Requirements for Manville's Membranes and Various Roofing Systems
- **Metal Roofing**
 - Application
 - Details
 - Systems
- **Sarnafil Roofing Systems**
 - Sarnafil's Polyvinyl Chloride, Hot Air Welded Systems and Detail Requirements
- **Soprema**
 - Soprema Roofing Systems
- **Carlisle/Syntec Building Products**
 - Product Details & Requirements for Roofing Systems
- **Certified Roofing Torch Applicator**
 - Certified Roofing Torch Applicator Program
 - Application Techniques, Known Facts of Propane Gas and Combustion on Torch Applied Membranes

- Recertification Program
- **Torch Safety Techniques**
 - Accident Prevention
 - Application Techniques
 - Fire Safety
- **Confined Space Entry**
 - Confined Space Competent Person
 - Confined Space Entry
- **Fall Protection Training**
 - Fall Protection Competent Person
 - 8-Hour Fall Protection
- **Scaffold Training**
 - Dismantle
 - Fall Protection Awareness
 - How to Build/Code
 - Safety Guidelines
 - Scaffolding Competent Person
- **Construction Site Project Management**
 - Emergency Response Planning
 - Foreman Responsibility for Communication, Documentation and Reporting
 - Worker Responsibility for Documentation and Reporting
- **Forklift Training & Aerial Work Platform**
 - Aerial Lifts
 - Boom Lift
 - Forklift (Gradall) Certification
 - Scissor Lift
 - Class 4 & 5
- **GHS Labeling**
 - Requirements
 - Signal Words
- **Going Green/Green - Renewable Energy Systems**
 - Design and Install Equipment for Energy Efficiency
 - Electricity
 - Energy Efficiency for Roofing
 - Green (Vegetated) Roofs
 - Green Roof Systems
 - Green Roofs
 - History of Solar Energy
 - Monolithic Membrane
 - Photovoltaic Cells
 - Photovoltaic System
 - Photovoltaic System Performance
 - Rooftop Solar PV
 - Solar Installation
 - Solar PV Systems
- **Rigging & Signaling**
 - Rigger In Crane Operation
 - Signal Persons Hand and Voice Signals
- **Foreman Skills/Training**
 - Advanced Blueprint Reading
 - Budgeting/Scheduling

- Leadership
- Mentoring
- **C.P.R & First Aid**
 - Adult CPR
 - AED
 - First Aid
- **Flagger Training**
 - Construction Zone
 - Residential Zone
 - Traffic Zone
- **Globally Harmonized Systems Training**
 - Acclimatization
- **Waterproofing & Damproofing**
 - Asphalt Overlay
 - Below Grade
 - Confined Space Training
 - Elastomeric Coatings
 - Excavations
 - Hot Applied
 - Hot Rubber
 - Interior & Exterior
 - Liners
 - Materials and Handling
 - Monolithic Membrane 6125
 - Planters
 - Sheet Applied
 - Split Slab Construction
 - Techniques and Applications
 - Vertical Waterproofing
- **Weatherproofing Envelope Systems**
 - Air Barrier System
 - Caulking
 - Climate Control
 - Commercial and Residential Exterior
 - Moisture Barrier System
- **Asbestos Craft Worker/Class II Roofer Course**
 - 8-Hour Asbestos Roofer Worker
- **Heat Illness Prevention**
 - Outdoor
 - Indoor

HAZWOPER

- HAZWOPPER Instructor Certified Training (requires completion of certified course)

HAZARDOUS MATERIALS

- Hazardous Waste
- Hazardous Materials
- Hazardous Chemical Cleaning
- Hazardous Waste Cleaning

- Hazardous Waste Operations and Emergency Response

OSHA 10/30 (Certified OSHA Instructor)

- OSHA 10 (Construction Outreach - requires completion of 10 hours)
- OSHA 30 (Construction Industry - requires completion of 30 hours)

COMPUTER SKILLS

- **Basic Computer Skills for Construction Industry**
 - Creating Jobsite Reports
 - Data Entry in Tracking Systems
 - Microsoft Office (Outlook, Word, Excel, PowerPoint)
 - Email/Internet

LITERACY SKILLS

- Vocational English as a Second Language (VESL) for Roofers & Waterproofers
 - Entering the Roofing Industry
 - Equipment
 - Roofing and Waterproofing Vocabulary
 - Safety
 - Tools

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

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

(This cap does not apply to Hazmat, OSHA 10/30 or HAZWOPER)

Note: Reimbursement for retraining is capped at 210 total training hours per trainee (200 hours RSI + 10 hours of OSHA) in Job Number 1. Reimbursement is capped at 200 total hours per trainee, including OSHA 10/30, in Job Number 2 regardless of the method of delivery.



Training Proposal for:
California Tradeshow and Sign Crafts Joint Apprentices
Training Trust Fund

Agreement Number: ET18-0919

Panel Meeting of: December 8, 2017

ETP Regional Office: San Diego

Analyst: K. Hernandez

PROJECT PROFILE

Contract Attributes:	Priority Rate Retrainee Apprenticeship	Industry Sector(s):	Construction Services Priority Industry: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Counties Served:	Multi Counties	Repeat Contractor:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Union(s):	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Tradeshow and Exhibit Installers Local 831 (Southern California) and Local 510 (Northern California)		
Turnover Rate:	≤20%		
Managers/Supervisors: (% of total trainees)	N/A		

FUNDING DETAIL

Program Costs	+	Support Costs	=	Total ETP Funding
\$278,000		\$19,240 8%		\$297,240

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 Journeyman	Comm'l Skills, OSHA 10	80	8-200	0	\$588	\$22.04
				Weighted Avg: 25			
2	Retrainee Apprentice	Comm'l Skills, OSHA 10	200	8-200	0	\$1,251	\$22.04
				Weighted Avg: 90			

Minimum Wage by County: SET Priority Industry: \$22.04 per hour.

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

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

Wage Range by Occupation

Occupation Titles	Wage Range	Estimated # of Trainees
Journeyman Trade Show Installer		60
Journeyman Exhibit Builder		20
Apprentice Trade Show Installer		200

INTRODUCTION

Established in 2008, the California Tradeshow and Sign Crafts Joint Apprentices Training Trust Fund (CA Tradeshow) (www.local831.org) serves workers in two local unions. Local 831 of the Tradeshow and Exhibit Installers serves Southern California and Local 510 serves Northern California. CA Tradeshow provides up-to-date industry skills training and secure high-quality job opportunities for its members.

Workers trained are employed by companies that build and install exhibits at trade shows, major convention centers, hotels and other conference and exhibit venues. The trust serves 300 Apprentices and 1,500 Journeymen. Tasks include the preparation, storage, hauling, loading, unloading, construction, uncrating, re-crating, layout, installation, dismantle, and maintenance of tradeshow, convention, special events and meeting related materials. Worker tasks also include the operation of all computer, mechanical and lifting equipment necessary to complete the installation of booth equipment, interior and exterior decorations, tradeshow furniture, floor coverings, and any other display related materials.

PROJECT DETAILS

This is CA Tradeshow's second ETP Agreement, and the first within five years. There has been an increase in trade show business and the need for skilled workers. For example, in 2014 there were 111 active Apprentices; today, there are approximately 300. In addition, the overall increase in trade show business requires trade shows to be installed and torn down quickly to make room for the next show. Workers must work faster and more productively while maintaining safe working conditions in what are often a crowded environment. Furthermore, the organization is a relatively new apprenticeship program and many Journeymen Trade Show Installers and Exhibit Builders have not completed formal training as Apprentices. ETP funding will help the organization provide upskill training to all trainees.

Apprenticeship Program

The Panel is authorized to fund Apprentice training that does not displace any other source of government funds, or replace an existing apprenticeship program approved by the Division of Apprenticeship Standards (DAS). The Apprenticeship Training Program is designed to supplement cost of delivery for the Related and Supplemental Instruction (RSI) portion of DAS-approved apprenticeship training. This Apprenticeship program is five years.

For the building trades, it is not customary for a worker to be employed 90 consecutive days with a single employer. The Panel may substitute non-consecutive hours worked for retention. This modified retention period must be no less than 500 hours within 272 days with more than one employer. Both the standard and modified retention periods will apply to this proposal.

To ensure ETP does not displace Montoya Funds, Apprenticeship reimbursement is reduced by \$5, reducing the priority industry rate from \$18 to \$13 per hour. In addition, the Panel adopted a "blended rate" for Journeymen, reflecting the fact that they may be employed by a variety of contractors over the two-year term of contract ranging from large employers, to small (≤ 100 employees). This is \$22 per hour, midway between the Priority Industry standard rate (\$18) and Small Business rate (\$26).

The ETP wage for Apprentices is no less than \$22.04. However, actual wages paid are shown in the Training Plan Table.

Employer Demand

Employer needs are communicated directly to CA Tradeshow through employers who serve as trustees. Employer needs, including the need for workers trained in specialty skills, general shortages of workers and other needs are also reported through local unions to the Trust.

Curriculum Development

Curriculum is developed by the industry with input from labor and management stakeholders. Curriculum development is further customized for local area employers, and employer members are involved in journeyman and apprenticeship training plan design. Training topics are customized to include new equipment and to meet new industry standards/materials. Trainers are qualified journey level workers with extensive practical and training experience who are employed by the CA Tradeshow and have developed training curriculum based on real world experience.

Training Plan

Training will be delivered by qualified in-house Journeymen with extensive practical and training experience. CA Tradeshow will also use the Los Angeles Unified School District and the Anaheim Convention and Visitors Bureau for specialized training.

Commercial Skills (95% for Journeyman/Apprentice): Courses will include Tradeshow basics, custom booth, graphics/custom booth, graphics/custom booth 2, power tools, and rigging for Apprentices. Journeyman training will also include boom lift, custom exhibits, scissor lift, plan reading and scaffolding. These classes are needed for the latest processes, procedures and industry methodologies. These skills will keep the trainees more employable in the trade show industry.

Certified Safety Training

OSHA 10: (5% for Journeyman/Apprentice): This training is a series of courses “bundled” by industry sector and occupation. Completion of the training results in a certificate that expands employment opportunities. Typically, OSHA training is delivered to workers in the building trades. It consists of 10 hours for OSHA 10. This training is not required as a condition of doing business in California. Note: To ensure that each trainee receives certification, ETP will only consider payment earned upon completion of the full 10-hour course. OSHA 10 is not included in the 10% limitation on safety training. The trainer-to-trainee ratio is 1:40 for OSHA 10.

Impact/Outcome

Apprentices will complete competency-based courses that include an introduction to the industry, general procedures, safety, customer service, team building, rigging, layout, installation, graphics, dismantling of exhibits, use of power tools, trade show math, schematics and drawings, and how to build a custom booth. Apprentice training will result in advancement to journey level status. Trainees also will qualify for OSHA 10, forklift safety and scissor lift safety certifications.

Journeymen will take courses in lifts, the basics of the industry, custom exhibits, rigging, modular systems, graphics, customer service and communications and plan reading. Exhibit Builders will learn how to progress from work order to completion of an exhibit, proper use of tools and equipment, blueprint reading, and building skills.

Commitment to Training

ETP funding will not displace CA Tradeshow’s financial commitment to training. Employers will continue to make contributions to the training trust for every hour worked by Apprentices, and Journeymen. In addition, CA Tradeshow anticipates that the opportunity for enhanced training made possible by ETP funds will encourage an ongoing commitment to training by employers participating in this project. Safety training is, and will continue to be, provided by the participating employers in accordance with all pertinent requirements under state and federal law.

Marketing and Support Costs

CA Tradeshow requests, and staff supports, 8% in support costs to promote training opportunities for Journeymen and Apprentices with the 64 signatory employers, 94% of which are small businesses. Support costs will also be used by the CA Tradeshow in recruiting Apprentices from schools, employment centers and community organizations.

ETP-funded training will be discussed at all labor management meetings and pertinent trade, industry, and apprenticeship events. CA Tradeshow routinely meets with stake-holders to ensure training plans meet business needs. Marketing and training evaluations are conducted to via face-to-face meeting, email and regular contact with employers and unions.

RECOMMENDATION

Staff recommends approval of this proposal.

DEVELOPMENT SERVICES

Steve Duscha Advisories in Sacramento assisted with development of this proposal for a fee of \$10,000.

ADMINISTRATIVE SERVICES

Steve Duscha Advisories and the Los Angeles Unified School District, Los Angeles, will perform administrative services for a fee not to exceed 13% of payment earned.

TRAINING VENDORS

Los Angeles Unified School District, Los Angeles, will provide Commercial Skills - Custom Booth

Anaheim Visitors Bureau, Anaheim, will provide Commercial Skills - Customer Service/Certified Tourism Ambassador Certifications

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

08-200 Trainees may receive any of the following:

COMMERCIAL SKILLS**Apprentice Trade Show Installer**

- Tradeshow Basics
- Custom Booth
- Graphics/Custom Booth
- Graphics/Custom Booth 2
- Power Tools
- Rigging

Journeyman Trade Show Installer

- Boom Lift
- Custom Exhibits
- Extruded Metals
- Fall Protection for Trade Show Riggers
- Forklift Operation and Safety
- Genie Lift
- Power Tools
- Trade Show Scaffolding
- Scissor Lift
- Show Site Graphics
- Trade Show Basics
- Portable Exhibits
- Plan Reading
- Pallet Jack Operation and Safety
- Scaffolding
- Communications for Trade Show Workers
- Customer Service/Certified Tourism Ambassador Certifications

Exhibit Builder

- From Work Order to Completion
- Using Shop Tools and Equipment
- Reading Blueprints and Shop Drawings
- Building Cabinets, Risers and Headers
- Building a Custom Exhibit
- Customer Service/Certified Tourism Ambassador Certifications

OSHA 10 (Certified OSHA Instructor)

- OSHA 10 (requires 10hrs completion)

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



**TRAINING PROPOSAL FOR
ADELAIDA CELLARS, INC.
17-0610**

Panel Meeting Date: 10/27/2017
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:		\$ 30,420.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 30,420.00	N/A	\$ 0.00	\$ 49,400.00

APPLICANT PROFILE

Company Summary	Founded in 1981, Adelaida Cellars, Inc. (Adelaida) is headquartered in Paso Robles. The family owned Company sits on 157 acres and produces between 15,000-18,000 cases of wine annually.

Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 46	US: 46	World Wide: 46
Turnover Rate (Applicant)	5.00 %		
Repeat Contractor	No		
High Unemployment Area	No		

Union(s)	N/A
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TRAINING PROFILE

Training Objective(s)	Training will help build and improve employee's job specific skills, as well as help meet the demands of the growing industry and customer expectations. Employees will be cross-trained in a variety of areas, including the production of wine, customer service, and business/management skills.
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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	30	\$ 26.00	39	\$ 1014	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Adelaida produces a variety of wines, including Rhone, Cabernet and Pinot Noir wines in Paso Robles. They operate out of a space that is over 23,000 square feet and sees about 1,600 visitors a month. The Company is a Certified California Sustainable Winegrowing Winery and Vineyard. Target customers include retail outlets, individual consumers, as well as events that will be distributing wine.

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>Adelaida has implemented new processes in production for sorting fruit and fermentation efficiencies. These implementations are geared toward improving water quality, pruning and disease management in the Vineyards.</p> <p>Adelaida has also implemented new business processes for inventory costs, management, and controls, as well as new reporting packages for better analysis. To meet business demands, all employees will receive Business Skills and Continuous Improvement training. Topics will include business strategies, performance management, sales and marketing, quality concepts and team building. Training will improve customer service techniques and upgrade the quality of reporting and analysis.</p> <p>Select Production Staff and Operators will also be receiving Manufacturing Skills training. Topics will include Design and Engineering, Maintenance Equipment and Production Skills. Training will help maintain better business processes for inventory costs, management, and controls and will increase product satisfaction.</p> <p>Training will take place at the Company's location in Paso Robles and will be delivered by a combination of in-house subject matter experts and outside vendors to be identified during the contract term.</p>
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PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Adelaida spends an estimated \$34,000 annually in training at their California facility. The Company currently provides on-the-job training related to specific job functions. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law. The Company has identified internal lead personnel to oversee training delivery, scheduling, and tracking. The Company has also retained an administrative subcontractor to ensure that training administration and documentation adhere to ETP requirements.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training in Business Skills and Continuous Improvement. Operators and Production Staff will receive training in Manufacturing Skills.	

4. Additional Company or Training Project Details

4.1 Program Waivers

Provided here are the waivers and their descriptions that apply to this Panel Proposal.

Waivers	Description
No waivers have been requested	

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 Grants Intelligence Inc.	Suwanee	N/A
Administrative	Training Grants Intelligence Inc.	Suwanee	13% of funding earned

PROPOSED TRAINING PROJECT DETAILS

Training	None selected to date	N/A	N/A
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4.3 Previous ETP Project Summary

The applicant has no previous ETP contracts.

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 Strategies
	Customer Service
	Leadership
	Performance Management
	Sales and Marketing
Continuous Improvement Skills	Quality Concepts
	Team Building
Manufacturing Skills (ME) (Standard)	Advanced Techniques
	Design and Engineering
	Equipment Operations
	Maintenance Equipment
	Production Skills



**TRAINING PROPOSAL FOR
Anthro Interactive, Inc.
17-0959**

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Kellen Hernandez
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$24,570.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
3,400.00	N/A	\$0.00	\$67,487.00

APPLICANT PROFILE

Company Summary	Anthro Interactive, Inc., (Anthro) provides digital marketing consulting services. The Company specializes in services for clients that need assistance with brand strategy, E-commerce management, website design and mobile application development.
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Industry Sector(s)	Information
Priority Industry	Yes
No. Employees (Applicant)	State: 21 US: 21 World Wide: 21
Turnover Rate (Applicant)	5.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Anthro's training project will focus on Computer Skills for Web Developers and Project/Designers and Business Skills for Sales Staff and Account Leads. Training will enable staff to become highly skilled, execute company initiatives, and expand business opportunities.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Owner, Retrainee	1	\$ 26.00	45	\$1,170	8 - 60
1	Retrainee	20	\$26.00	45	\$1,170	8 - 60

1. Company Background

Founded in 2013 and located in San Diego, Anthro provides digital marketing consulting services that include internet publishing and technology management. The Company's clients range from professional athletes that want to build their own brand to consumer focused corporations like Soundcast, Sonim Technologies, Postmates and Lyft Inc.

The Company develops a digital marketing and brand strategy focused on accomplishing the client's goals of increasing awareness of their brand, reaching targeted consumer segments, increasing engagement of current customers, increasing traffic to their website/social media accounts, and driving sales on their E-commerce platforms. Anthro executes an overall marketing strategy by managing digital marketing tactics like email marketing campaigns, digital loyalty programs, social media marketing, paid social media advertising, search engine marketing and search engine optimization.

2. Current Training Project Details

Purpose of Training

The digital marketing industry has grown significantly in the last five years and is constantly adapting to consumer trends and technology advancements. Likewise, Anthro's business model requires the Company to be agile to deliver the services its clients are requesting. As the Company grows its customer base, it works diligently to increase production, profitability and customer satisfaction.

To increase production, profitability and customer satisfaction the company must train its Web Developers and Project/Designers in highly technical Computer Skills. This training will focus on new or updated programming languages (Ruby on Rails, WordPress, PHP, HTML, CSS3, and Javascript), Database MySQL skills, and Full Stack Web Technologies used for building, hosting and managing websites.

In addition, Anthro's Sales Staff and Account Leads must be trained in Business Skills focused on digital marketing/brand strategies, E-commerce management, market research, and interpreting digital analytics. Training will include Google Adwords platform/SEM, Facebook/Instagram advertising platform, Google Analytics, and other digital marketing tools and platforms.

Anthro works with numerous clients simultaneously with varying levels of service. As the Company continues to grow, the demand on each staff members' skill will increase and ETP-funded training will ensure that its can compete with larger firms.

Training Infrastructure and Administrative Plan	The Company President will oversee all training and administration of this project, including training delivery, scheduling and documentation. Anthro has a detailed training schedule and is ready to start training upon approval. Anthro has retained Training Funding Source as an administrative consultant to ensure that all training records meet ETP compliance.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training applicable to their jobs in Business, Computer and Continuous Improvement Skills topics. Training will be delivered by expert in-house trainers or highly skilled and qualified training vendors.	

4. Additional Company or Training Project Details

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Anthro has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$ 1,900.00
Administrative	Training Funding Source	Seal Beach	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Advertising
	Brand ID & Strategy
	Content Strategy
	E-Commerce
	Finance & Accounting
	Information Architecture
	Intellectual Property, Trademark, Copyright
	Marketing Research
	Mobile Applications
	Social media/Marketing Technology
	Strategy Design and Planning
	Tracking & Analytics
	User Experience/Interface Design
Computer Skills (Standard)	ANDROID (4.2-L)
	BACKEND LANGUAGES- PHP, Python, Javascript, Java, Gr
	DATABASES-Relational MySQL, PostgreSOL, SQLit, NoS
	DESIGN-InVision, Adobe Photoshop/Illustrator/Extract, InDesign, Sketch
	INFRASTRUCTURE-Servers, Cloud, Search, Cache, Admin, Bi
	IOS (6, 7 & 8)
	TOOLS-Git & Git Workflow, IDE, Jira, Cont Integ, Au
	WEB DEVELOPMENT - FRONTEND-HTML, CSS3, Javascript, B
Continuous Improvement Skills	Process/Quality/Productivity Improvements
	Teambuilding

DELEGATION ORDER



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

Small Business

ET18-0153

Approval Date: November 28, 2017

ETP Regional Office: North Hollywood **Analyst:** L. Vuong

CONTRACTOR

- Type of Industry: Services
Priority Industry: Yes No
- Number of Full-Time Employees
California: 92
Worldwide: 92
Number to be trained: 70
Owner Yes No
- Out-of-State Competition: No OSC
- Special Employment Training (SET): Yes No
- High Unemployment Area (HUA): Yes No
- Turnover Rate: 11%
- Repeat Contractor: Yes No

FUNDING

- Requested Amount: \$49,060
- In-Kind Contribution: \$58,448

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 SET	Business Skills, Computer Skills, Continuous Imp.	59	8-60	0	\$484	\$29.38
				Weighted Avg: 22			
2	Retrainee SB <100 SET HUA	Business Skills, Computer Skills, Continuous Imp.	1	8-60	0	\$484	\$16.16
				Weighted Avg: 22			
3	Retrainee SB<100 SET Job Creation	Business Skills, Computer Skills, Continuous Imp.	10	8-100	0	\$2,002	\$13.22
				Weighted Avg: 91			

- Reimbursement Rate: Job #'s 1-3: \$22 SB Non-Priority
- County(ies): Alameda, Los Angeles, Merced, Orange, Riverside, Sacramento, San Bernardino, San Diego, Santa Clara, Ventura
- Occupations to be Trained: Sales Consultants, Support Staff, Information Technology Staff
- Union Representation: Yes
 No
- Health Benefits: Job #1: \$6.38 per hour

SUBCONTRACTORS

- Development Services: N/A
- Administrative Services: N/A
- Training Vendors: To Be Determined

OVERVIEW

Founded in 1971 and headquartered in Chatsworth, Autoland LLC (Autoland) is a car buying service for members of credit unions, as well as affinity groups such as the National Motor Club of America. The Company provides a convenient, hassle-free car buying experience. Shortly after its formation, Autoland attracted credit union business and opened its first credit union based office in 1990. Within three years, the Company went from 5 offices to 50; and today the Company has 55 offices in ten counties throughout California. Autoland offices are co-located

in established credit union facilities. Credit unions rent space to Autoland to accommodate sales consultants assigned to assist members with the car buying process.

Autoland's large auto dealer network has access to extensive inventory and has the buying power to find virtually any make and model within the customer's target price range. The Company also negotiates pricing and secures manufacturer incentives. Autoland's Sale Consultants also helps clients find affordable financing through Credit Union Direct Lending (CUDL), a point-of-sale and indirect auto lending network of credit unions that matches lenders with consumers based on their credit application. The Company's Sale Consultants do not sale cars.

Autoland is not in the loan underwriting business. All Autoland facilitated loans are underwritten and funded by credit unions. When Autoland arranges financing through CUDL, the Company earns a fee. This fee is a percentage of the loan amount and varies by credit union and client credit score. Typically, 1%, but in some cases may be up to 2%. When credit union members secure financing directly on their own, no fee is paid to Autoland.

Autoland is eligible for ETP funding under Special Employment Training (SET) for frontline workers. This will be Autoland's fifth ETP project and the second within the last five years.

Autoland is experiencing a rapidly changing business environment as a result of new e-commerce and virtual auto-buying services. In addition, Autoland must keep up with technological changes, industry requirements and customer demands to remain competitive. These changes have a significant and requirements financial impact on the business.

Autoland is seeking ETP funding for training to help in the following areas:

- Upgrade and expand its IT infrastructure, implement additional regional sales skills, enhance Company's computer software and increase overall staff training;
- Analyze ways to attract existing and new members; and
- Develop strategy to grow the business by increasing sales methods, optimize service territories and increase partnerships.

Over the past year, Autoland has experienced a 10% growth in sales and an increase in its workforce from 83 employees to 92 employees. The Company anticipates an additional increase of 10% in business with the next year. Autoland's strategic plan for 2017-2018 includes upgrading incumbent workers' skills and internal computer software, specifically focusing on redesigning, updating, developing products and services to attract existing and new members, hiring new employees and standardizing processes and procedures across all facilities.

Retrainee - Job Creation

Autoland is looking to expand its operations to new locations within credit unions and new credit unions. This planned expansion will require the retraining of existing employees, combined with the hiring and training of new employees to increase sales and sustain desired service levels. Therefore, Autoland has committed to hiring 10 new Sales Consultants (Job Number 3) to support the Company's plans to increase its business capacity. Recently, Autoland hired two new Sales Consultants, which is consistent with its hiring plan.

As an incentive for companies that commit to hiring, training for newly hired employees will be reimbursed at a higher rate, and trainees may be subject to lower post-retention wages.

Trainees must be hired within the three-month period prior to Panel approval or during the term of contract. These trainees will be hired into “net new jobs” as a condition of contract.

Training Plan

Training under the prior ETP Agreement focused on improved web tools, customers’ personal data security, information pertaining to car buying options. Training under this proposal will concentrate on computer skills, new technologies, products and services, ways to improve business functions, and becoming more consistent and efficient.

This proposal will target 70 workers from all 55 facilities in California. Training will be provided by in-house subject matter experts and vendors as needed in the following:

Business Skills: Training will be offered to all in customer service, business partners, sales, organization, priority and company operations.

Computer Skills: Training will be offered to all occupations in new and existing automated system, as well as dealer and credit union software applications to support products, services and manage overall business operations.

Continuous Improvement: Training will be offered to all occupations in company-wide process improvements and services to better serve customers, strategic planning and help keep the Company remain competitive.

Cap on Training Hours

Autoland reports that the 10 Job Creation trainees (Sales Consultants and Support Staff) in Job Number 3 will go through a full two-week/80-hour initial training program delivered by experienced in-house subject matter experts. Further, these trainees must also receive an additional 20 hours of training throughout the year. Without this dynamic training, the Company believes these trainees would not be able to fully grasp important business concepts or function properly in their respective roles. Therefore, Autoland is requesting a modification of the 60-hour cap to 100 hours for trainees in Job Number 3 only.

Training Infrastructure

Training will begin upon approval and majority of training will be held in Chatsworth. Autoland has designated an Accounting Director at its Chatsworth location will oversee ETP training and administrative responsibilities including managing and scheduling training and documentation. The Accounting Director will be responsible for enrollment, recording, tracking and securing rosters, verify training and retention completion and ensure compliance with all ETP requirements.

RECOMMENDATION

Staff recommends approval of this proposal.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET15-0165	Statewide	07/01/14 – 06/30/15	\$49,896	\$49,277 (99%)

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60 Job Numbers 1 & 2

8-100 Job Number 3

Trainees may receive any of the following:

BUSINESS SKILLS

- Business Concepts
- Business Administration
- Company Strategies
- Customer Service
- Marketing
- Sales Process and Administration
- Appraisals
- Product Training
- Industry Rules & Regulations

COMPUTER SKILLS

- CDK Dealer Software
- Autoland Information System
- Computer Networking
- Computer Programming

CONTINUOUS IMPROVEMENT

- Business Administration Updates
- Marketing Updates
- Quality Control
- Sales Training

Note: Reimbursement for retraining is capped at 60 total hours per-trainee for Job Numbers 1 & 2, and capped at 100 total hours for Job Number 3, regardless of method of delivery.



**TRAINING PROPOSAL FOR
Bennett Engineering Services Inc
17-0925**

Panel Meeting Date: December 8, 2017
Regional Office: Sacramento Regional Office
Analyst Name: Dumaurier Jordan
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 17,862.00	
Program & Admin Cost	SupportCost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 17,862.00	N/A	\$ 0.00	\$ 24,300.00

APPLICANT PROFILE

Company Summary	Bennett Engineering Services, Inc. (Bennett Engineering), (www.ben-en.com) is a civil engineering company that provides engineering services for the private and public sectors.
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Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	Yes		
No. Employees (Applicant)	State: 25	US: 25	World Wide: 25
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Bennett Engineering's training objective is to improve current processes to support Company growth. The Company has also begun providing land surveying and construction management services. Staff will require training to be proficient in these areas.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Owner, Retrainee	2	\$ 26.00	33	\$ 858	8 - 60
1	Retrainee	16	\$ 26.00	33	\$ 858	8 - 60
2	Retrainee- Job Creation Initiative Program	3	\$ 26.00	31	\$ 806	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Bennett Engineering was founded in 2008 and is headquartered in Roseville. The Company provides professional civil engineering services for private and public works infrastructure projects that include transportation, water resources, and other site improvement projects. Bennett specializes in water and waste water systems, transportation, land development, storm water pollution prevention, project funding acquisition, and management services.

This will be the Company's third ETP Agreement and third in the last 5 years. All training will take place at its sole location in Roseville.

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>Training will focus on Bennett Engineering's new services, which include land surveying and construction management services. Training in these areas will allow Bennett Engineering to better compete for public and private works infrastructure projects and eliminate the need to outsource these services to their competitors.</p> <p>Training will also focus on upgrades to current software programs: Ajera 9, AutoCAD, MicroStation, and AEC. Training will allow staff to meet customer demands and to improve operator proficiencies.</p> <p>Some training topics in the curriculum are similar to the previous Agreement; however, trainees will not receive duplicate training.</p>
Training Infrastructure and Administrative Plan	<p>Bennett Engineering's HR department and Support Staff will oversee the scheduling and record keeping requirements. The Company has retained Propel Consulting Group, Inc., to perform administrative duties for this Agreement.</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.

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory and E-Learning – Instructor Led/Distance Learning
Summary	
All occupations (Attachment 1) will receive training applicable to their jobs in Business, Commercial, Computer, and Continuous Improvement Skill topics listed (Attachment 2).	

4. Additional Company or Training Project Details

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

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	Prospect Consulting Group, Inc.	San Francisco	\$ 500.00
Administrative	Prospect Consulting Group, Inc.	San Francisco	Not to exceed 13% of funding earned
Training	To be Determined	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET15-0410	Roseville	04/08/15 – 04/07/17	\$13,936	\$12,675	91%
ET13-0109	Roseville	07/26/12 – 07/25/14	\$10,608	\$8,476	80%

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population,

PROPOSED TRAINING PROJECT DETAILS

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	Leadership Skills
	Marketing and Communication Skills
	Prevailing Wage
Commercial Skills (Standard)	Construction Management
	Land Surveying
Computer Skills (Standard)	Ajera 9
	AutoCAD Upgrades
	Infrastructure Design Premium
	MicroStation Upgrades
	OpenRoads Upgrades
	Wordpress
Continuous Improvement Skills	Financial Management
	Project Management
	Risk Management

<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Leadership Skills
	Marketing and Communication Skills
	Prevailing Wage
Commercial Skills (Standard)	Construction Management
	Land Surveying
Computer Skills (Standard)	Ajera 9
	AutoCAD Upgrades
	Infrastructure Design Premium
	MicroStation Upgrades
	OpenRoads Upgrades
	Wordpress
Continuous Improvement Skills	Financial Management
	Project Management
	Risk Management



**TRAINING PROPOSAL FOR
Bolide Technology Group, Inc.
17-0597**

Delegation Order Date: 08/07/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Webb, Monique
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$22,100.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$19,218.00	\$2,882.00	N/A	\$0.00	\$50,000.00

PROJECT PROFILE:

Repeat Contractor:	Yes			
Estimated Number of Trainees:	17	High Unemployment Area:	No	
No. of Employees: (Applicant)	State:18 US:18 WorldWide:25	Turnover Rate: (Applicant)	10.00%	
Industry Sector(s)				Priority Industry
Manufacturing				Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET	17	50	\$26.00	\$1,300.00
Total:			17			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	Contract Standard Min Wage
Group #: 1	Attributes: S-RET					Reimbursement Rate: \$26.00		
Account Executive	Los Angeles County	8	8-60		\$16.96	\$17.31 - \$40.00	0.00	\$16.96
Administrative Assistant	Los Angeles County	2	8-60		\$16.96	\$14.42 - \$17.31	2.54	\$16.96
Sales Manager	Los Angeles County	1	8-60		\$16.96	\$38.46 - \$60.10	0.00	\$16.96
Technical Support Engineer	Los Angeles County	4	8-60		\$16.96	\$14.42 - \$17.31	2.54	\$16.96
Warehouse Associate	Los Angeles County	2	8-60		\$16.96	\$14.42 - \$16.83	\$2.54	\$16.96

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee

INTRODUCTION

Bolide Technology Group, Inc. (Bolide) (<http://www.bolideco.com>), founded in 1995 and headquartered in San Dimas, seeks ETP funding for retraining. Training will be conducted in San Dimas.

Bolide meets the Panel's Out-of-State Competition (OSC) requirements.

Products / Services

Bolide is a worldwide manufacturer and ISO 9001:2008 certified distributor of CCTV surveillance products and accessories. Over the years, the Company has grown and expanded due to its rich history of offering cutting-edge products and its growing distribution network throughout the United States and Latin America.

Customer Base

The Company's customer base includes wholesale distributors, alarm and security dealers, and end-users of video surveillance systems in different vertical markets.

PROJECT DETAILS

Purpose of Training

This will be Bolide's third ETP Contract; third in the last five years. The prior Contract in 2014 focused on new products and technologies being developed in the industry. This proposal will be similar, focusing on new products and technologies. However, technology has significantly advanced over the past few years, and training will help bridge that gap. Training will not be duplicated.

This training proposal aims to increase productivity and long-term growth. Training will involve new products and techniques for the Sales department as well as Continuous Improvement for Administrative Staff.

Bolide is dedicated to developing distinct and innovative products to keep up with the surveillance industry. Its product portfolio has a complete line of high definition and network camera solutions; advanced digital video recorder;, and network video recorders. Training is required to increase product knowledge and customer service skills.

TRAINING PLAN

Training will be provided by in-house staff:

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Continuous Improvement Skills	
Classroom/Simulated Laboratory	Manufacturing Skills (ME)	Standard

Turnover Rate

ETP funds training for stable, secure jobs. Employer's turnover rate cannot exceed 20% for the facility where training is requested, as measured in the 12 months during proposal development.

Turnover Rate		
Location	City	Turnover Rate Percent
Bolide Technology Group	San Dimas	10.00%

SUBCONTRACTOR

N/A

PERFORMANCE

Active Contract

N/A

Prior Performance

Below summarizes Contractor's performance under prior contracts completed within the last five years:

ET14-0206

Term Date: 10/28/13-10/27/14

Contract Amount: \$26,000

Amount Earned: \$21,034 (80% of total contract amount).

ET12-0343

Term Date: 03/21/12-03/20/13

Contract Amount: \$30,160

Amount Earned: \$21,190 (70% of total contract amount).

RECOMMENDATION

Staff recommends approval of this proposal.



TRAINING PROPOSAL FOR
Booth Ranches LLC
18-0569

Panel Meeting Date: 12/08/2017
Regional Office: Sacramento Regional Office
Analyst Name: Dumaurier Jordan
Type of Proposal: Single Employer
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$28,080.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$28,080.00	N/A	\$0.00	\$30,000.00

APPLICANT PROFILE

Company Summary	Booth Ranches LLC (Booth) (www.boothranches.com) is family-owned and operated citrus grower located in Fresno County. The Company's main products are Valencia and Naval oranges grown on 8,500 acres.
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Industry Sector(s)	Agriculture		
Priority Industry	Yes		
No. Employees (Applicant)	State: 104	US: 104	World Wide: 104
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	Yes		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will continue the improvement of production processes and sustainable farming practices by implementing advanced Lean processing procedures. Training will focus on software proficiencies and its new lemon growing and production lines.
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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	104	\$18.00	15	\$270	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Booth citrus products are sold to major retailers and institutions worldwide including companies such as Wal-Mart, Costco, Savemart, Save A Lot, Canadawide and Loblaw's.

Booth also operates a Horse Division dedicated to raising high quality reigning horses for sale.

Training will take place at the Company's three facilities located in Orange Cove for workers at the orchard and Horse Division. This will be Booth's fourth ETP Agreement, and fourth in the past five years.

2. Current Training Project Details

Purpose of Training	<p>Previous training focused on sustainable practices for citrus farming, renovation of shipping and packing operations, and the introduction of Face-Forward Streamline software. In this proposal, training will focus on advanced Lean production processes, continued improvement of sustainable farming practices, water management and conservation, and strategic growth planning. Further Lean training will reduce production times and water waste.</p> <p>Booth is venturing into a new crop line and will begin to produce lemons next season. The production and packing operation for oranges and lemons differ, therefore, training is necessary for staff to ensure proper production techniques. In addition, the Company has purchased new equipment including packaging, sorting, and grading machinery to accommodate the processing line for lemons.</p> <p>The Company will also roll out phase two of its Streamline and Famous software to enhance Booth's data mining capabilities. Training will be provided to a larger staff population to increase software operation proficiencies. Data mining training will improve the quality of real-time production data for the farming and packaging operations. Horse Ranching Staff will receive training on the proper handling, storage, transport and clean-up of hazardous materials.</p> <p>There are training topics included in the curriculum that are similar to the previous Agreement; however, trainees will not receive duplicate training.</p>
Training Infrastructure and Administrative Plan	Booth's HR Coordinator and Support Staff will oversee all administration and training. The Company has also retained a third party contractor with ETP experience to assist with all administrative duties.
Marketing Plan (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1 will receive training applicable to their jobs in Business, Commercial, Computer, Continuous Improvement, Hazardous Materials, Management and Manufacturing topics listed under Attachment 2.	

4. Additional Company or Training Project Details

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Booth has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Strategic Business Solutions, LLC	Visalia	\$ 2,000.00
Administrative	Strategic Business Solutions, LLC	Visalia	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes the active performance under the ETP contract.

Active Contract(s) Elements	Summary
Contract Number	ET17-0315
Purpose of Training	Training focused on providing sustainable practices for citrus farming, and renovation of shipping and packing operations.
Location(s)	Orange Cove

PROPOSED TRAINING PROJECT DETAILS

Active Contract(s) Elements	Summary
Term	12/8/16 – 12/7/17
Approved Amount	\$69,498
Projected Earnings	\$34,068
Performance Percentage	49%
Trainee Details	To date, the ETP Online System shows 1,206 reimbursable hours. Trainees are currently in retention and all are expected to complete the retention period successfully.
Other Notes	During the Agreement, Booth lost the two staff members who were tasked with overseeing the ETP Agreement. The loss of the lead staff caused a delay in training. To ensure success of the Agreement, the Company has established a succession plan in case of the loss of staff. Booth is ready to begin training and will be led by its General Manager and HR team.

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Advanced Account Development
Commercial Skills (Standard)	Advanced Wind Machine Repair and Maintenance
	Fleet Maintenance Training
	Sorting, Grading, Packaging Equipment Operation
Computer Skills (Standard)	Advanced Microsoft Office
	Famous Software Training
	In Scan/Do Forms Training
	Streamline Software training
Continuous Improvement Skills	Advanced LEAN Process
	Food Product Safety
	Sustainable Farming Practices
	Water Management and Conservation
Hazardous Materials Skills	Hazardous Materials Transportation, Storage
Management Skills	Strategic Growth Planning



**TRAINING PROPOSAL FOR
DMG Corporation
17-0820**

Panel Meeting Date: 10/27/2017
Delegation Order Date: 10/06/2017
Regional Office: San Diego Regional Office
Analyst Name: Heather Bernard
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: \$48,880.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$48,880.00	N/A	\$0.00	\$64,632.00

APPLICANT PROFILE

Company Summary	DMG Corporation (DMG) sells and manufactures customized HVAC equipment for commercial businesses. The Company also provides engineering services and project management assistance for creating personalized solutions. Customers include hospitals, hotels, auditoriums, contractors, and mechanical engineers.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. of Employees (Applicant)	State: 97	US: 107	World Wide: 107
Turnover Rate (Applicant)	2.50 %		

Repeat Contractor	No
High Unemployment Area	No
Unions	N/A

TRAINING PROFILE

Training Objective	Training will focus on implementating a new company-wide ERP system as well as creating of a new skilled middle management team. DMG will also focus training on HVAC product updates.
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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	91	\$ 26.00	20	\$ 520	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	3	\$ 26.00	20	\$ 520	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

DMG was founded in 1967 and is headquartered in Orange. The Company sells and manufactures customized HVAC equipment for commercial businesses. DMG also provides engineering services and project management assistance for creating personalized solutions. The Company has grown from an original partnership of three individuals to a thriving team of just over 100 employees nationwide.

DMG has additional locations in Northern California, San Diego, and Hawaii; however only its Southern California (Orange and San Diego) locations will be included in this proposal. This will be DMG's first contract with ETP.

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>DMG is improving processes. The Company has begun implementing a new Enterprise Resource Planning (ERP) system companywide in August. The Netsuite modules will be phased into operations over the next twelve months.</p> <p>DMG is also training staff on equipment and customers service. Trainees will receive ongoing training on the HVAC technology changes relating to updated equipment and product knowledge. Manufacturing staff will receive training in equipment operations and maintenance, manufacturing processes, quality control & quality assurance. The Service & Warranty Department will be trained to work extensively with customers on equipment issues or breakdowns with HVAC systems.</p> <p>Additionally, DMG will be implementing a new middle management structure. DMG expects to promote current staff into leadership positions. To ensure they have the skills needed to properly manage their teams, the Company will be implementing bi-monthly leadership training sessions.</p>
Training Infrastructure and Administrative Plan	<p>The ETP project will be overseen by the Company's Human Resources Generalist who will assist in scheduling and collecting training rosters. DMG has also retained Training Funding Source as an administrative subcontractor.</p>
Marketing Plan (MEC Only)	<p>N/A</p>
Support Cost Description	<p>N/A</p>

PROPOSED TRAINING PROJECT DETAILS

(MEC Only)	
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Business Skills and Continuous Improvement Skills will improve customer service and leadership skills. Computer Skills and Manufacturing Skills will improve processes and equipment skills.	

Delivery Method/Level	Productive Laboratory
Summary	
In addition to classroom-based training, DMG is requesting to use the Productive Lab (PL) delivery method for Manufacturing Skills, for all Production Staff. Training will occur on production equipment including sheet metal benders, cutters, metal presses. Trainees will learn how to learn how to manufacture and assemble dampers, fans, motors and pumps. Training will also include metal cutting required to create box frames and how to create customized motors and fans to customer specifications from diagrams. The PL training will be especially useful for the job creation trainees to ensure that they have the needed skills to efficiently perform at a high level.	
The trainer-to-trainee ratio will not exceed 1:1. PL hours will be capped per-trainee at 24.	

4. Additional Company or Training Project Details

Retrainee Job Creation

DMG is in a period of growth and will be adding new staff to all teams. Growth is a result of an expanded customer base, more product lines and new technologies.

The Company expects to hire in all departments to keep up with customer needs. In addition, some staff will be promoted to better positions internally, creating vacancies at the entry levels. In an effort to project new hires conservatively, DMG is only requesting Job Creation for three new Production Staff (Group 2). The date-of hire for these trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

4.1 Program Waivers

N/A

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or %
Development	Training Funding Source	Seal Beach	\$ 2,900.00
Administrative	Training Funding Source	Seal Beach	Not to exceed 13% of earned funds
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, curriculum, and program characteristics.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	
	Communication Skills
	HVAC Automation/Systems
	Leadership Skills
	Negotiation Skills
	Problem Solving Skills
	Product/Service knowledge
	Project Management Skills
	Sales/Presentation skills
Computer Skills (Standard)	
	AutoCAD
	Enterprise Resource Planning Software NetSuite
	Microsoft Office Suite/Outlook
	Payroll Processing
	Revit Software
	Snagit Software
Continuous Improvement Skills	
	Process Improvement Skills
	Time Management Skills
Manufacturing Skills (ME) (Standard)	
	Equipment Operations & Maintenance/Troubleshoot
	Manufacturing Technical Processes
	Quality Control & Assurance

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	
	Equipment Operations & Maintenance
	Manufacturing Skills - Dampers
	Manufacturing Skills - Filter Box
	Manufacturing Skills - Hoods
	Manufacturing Skills -Fan & Housing Units

Attachment 2 - Training Delivery and Curriculum Listing

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

PL Justification and Details		
Explain the need for productive laboratory (PL) training	DMG is requesting to add PL as a training delivery method for its Production Staff which will allow trainees to take what they learn in a classroom setting and apply to actual production processes. The PL training will be especially useful for the job creation trainees DMG expects to hire during the term of the contract. PL training will allow the company to ensure that the newly hired trainees have the skills needed to perform at a high level in a productive environment in order to reduce err	
Describe the Equipment/Processes to be used in delivering the PL training	Training will occur on production equipment including sheet metal benders, cutters, metal presses. Trainees will learn how to manufacture and assemble dampers, fans, motors and pumps. Training will also include metal cutting required to create box frames and how to create customized motors and fans to customer specifications from diagrams.	
Describe Trainer Qualifications	Training will be provided by the Production Manager at the production site in Orange County.	
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	1
PLT Approval	Yes	



**TRAINING PROPOSAL FOR
Douglas Pancake Architects, Inc.
18-0623**

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Heather Bernard
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:		\$14,040.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$14,040.00	N/A	\$0.00	\$27,330.60

APPLICANT PROFILE

Company Summary	Douglas Pancake Architects, Inc. (DPA) is a boutique architecture firm specializing in senior housing and healthcare facilities across the U.S.
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Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	Yes		
No. Employees (Applicant)	State: 12	US: 12	World Wide: 12
Turnover Rate (Applicant)	0.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training will ensure staff are current on regulatory building & design codes, software updates and industry standards.

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

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Owner, Retrainee	1	\$26.00	30	\$780	8 - 60
1	Retrainee	11	\$26.00	30	\$780	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	3	\$26.00	60	\$1,560	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2010 and located in Irvine, DPA specializes in a wide range of architectural designs including retirement communities, assisted living and memory care facilities and skilled nursing facilities. DPA also provides programming & concept design, assistance with acquisitions and repositioning of aging buildings. Customers include Silverado Senior Living, Brookdale Senior Living, Five Star Senior Living and Burke Real Estate Group.

Training will take place at DPA's sole location in Irvine.

2. Current Training Project Details

Purpose of Training

DPA must stay current with building codes and regulations which are updated every 3 years. These codes dictate requirements for the industry as a whole as well as specific requirements for specialty buildings, including senior living facilities. Under new building codes, DPA's staff are responsible for incorporating code requirements into the design process. Additionally, because DPA is licensed in 16 states across the nation, it must ensure that its Architects are trained in codes for each state. This requires extensive training throughout the year.

There is a demand for facilities that provide a functional and therapeutic residential setting for seniors. DPA's staff must be trained on building trends to accommodate customer needs. Training will include how a senior citizen's physical environment can affect their physical or cognitive disabilities drives changes in design at the Company.

The Company's software, ArchiCAD and Bluebeam, are continually updated and require ongoing training. These programs are essential to the Architects and it is crucial that staff are trained on updates to remain efficient and effective.

Currently, the Company has a culture of training and provides training bi monthly via its DPA University program. All staff participate in training, which is delivered in a classrooms setting with a live instructor. For the newly hired staff, DPA plans to provide three hours of classroom based training five days a week for the first four weeks of employment. The extensive training will ensure all newly hired staff have the skills to successfully perform their job duties.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	The Chief Financial Officer will oversee all training, including scheduling training and collecting the ETP rosters. DPA has retained Welsh Advisors as an administrative subcontractor to assist with the upload and data entry. Training will be delivered by in-house experts and vendors as needed.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training will be provided to all occupations in Business, Commercial and Computer Skills as identified in Attachment 1.	

4. Additional Company or Training Project Details

Retrainee Job Creation

Due to the Company's current and projected growth in the next two years, the Company is expanding existing business capacity by adding employees. DPA plans to hire two Architects and one Receptionist. As such, the Company is requesting training funds for the new staff to be included in the Job Creation Job Group. These trainees will be placed into net new jobs.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

DPA has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Welsh Advisors, Inc.	Anaheim	\$982.00
Administrative	Welsh Advisors, Inc.	Anaheim	13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Accounting Skills
	Customer Service Skills
	Leadership Skills
	Office Administrative Practices
	Project Budgeting
Commercial Skills (Standard)	Building and Construction Standards
	Design Trends
	Medical Research for design
	Product Knowledge
	Production Standards
	Project Continuous Improvement
Computer Skills (Standard)	ArchiCAD software
	Bluebeam Software



TRAINING PROPOSAL FOR
Eli's Auto Center II, Inc.
17-0525

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Marisol Niquet
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 47,630.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 47,630.00	N/A	\$ 0.00	\$ 54,210.00

APPLICANT PROFILE

Company Summary	Eli Auto Center II, Inc. (EA), located in Los Angeles, offers collision repair services and sells parts to consumers, insurance companies and fleet dealers.
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Industry Sector(s)	Services (Other)		
Priority Industry	No		
No. Employees (Applicant)	State: 58	US: 58	World Wide: 58
Turnover Rate (Applicant)	5.17 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

	Training will build skills and knowledge in production processes and improve efficiency and cost effectiveness.
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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	43	\$ 22.00	35	\$ 770	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	12	\$ 22.00	55	\$ 1210	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1977 and headquartered in Los Angeles, EA is a collision repair and parts company. Customers include vehicle owners, insurance companies, and fleet dealers. The Company operates three other locations in Los Angeles.

2. Current Training Project Details

Purpose of Training	<p>EA needs to update skills for high end luxury and exotic vehicles servicing. The repair, bonding, welding, and refinishing processes for these vehicles varies drastically from typical vehicles (e.g. Fords, Toyotas, Hondas). Manufacturers such as Audi, Bentley, Rolls-Royce, and Porsche incorporate specialized composites and steel/alloys into their structures. They also deploy sophisticated technology, such as lane-keeping, anti-roll, radar, night vision, active cruise, 4-wheel steering, and other smart systems aimed at both safety and a high performance driving experience. Employees require extensive training in order to obtain competency to safely repair these vehicles.</p> <p>Additionally, the Company needs to improve customer satisfaction, which is a very important aspect of the automotive repair industry. Employees will receive Business Skills in courses such as customer relationship building, conflict resolution, and communication skills to improve customer service. Another aspect of customer satisfaction is quality of work. Employees will receive Continuous Improvement courses to improve processes and ultimately improve services.</p> <p>For this proposal, EA will be hiring 12 new employees in all occupations to meet Company needs. Training will be delivered to all occupations by a combination of in-house subject matter experts and outside vendors to be identified during the contract term.</p>
Training Infrastructure and Administrative Plan	<p>EA spends an estimated \$48,900 annually in training. The Company currently provides on-the-job training in specific job functions. Safety training is, and will continue to be, provided in accordance with all pertinent requirements under state and federal law.</p> <p>The Company has identified internal lead personnel to oversee training, scheduling, and tracking. The Company has also retained an administrative subcontractor to ensure documentation adhere to ETP requirements.</p>

PROPOSED TRAINING PROJECT DETAILS

Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 – Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training in Business Skills, Commercial Skills, Computer Skills and Continuous improvement as shown in detail on Attachment “2” of the proposal.	

Delivery Method/Level	Productive Laboratory
Summary	
Estimators and Technicians will receive PL in Commercial Skills as shown in detail on Attachment 2 of the proposal.	

4. Additional Company or Training Project Details

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.

EA was recently certified to work on Mercedes Benz vehicles. This has increased workload for employees. The Company’s facilities are scheduling a month out and will need to hire additional staff to handle the workload. The Company has committed to hiring 12 new employees (Job Number 2). The date-of-hire for all trainees will be within the three-month period before contract approval or within the term-of-contract. Trainees will be hired into “net new jobs” as a condition of contract.

4.1 Program Waivers

N/A

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Synergy Management Consultants, LLC	Grass Valley	N/A
Administrative	Synergy Management Consultants, LLC	Grass Valley	Not to exceed 13% of payment earned
Training	Synergy Management Consultants, LLC	Grass Valley	\$ 200.00

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Advanced Sales and Marketing
	Communication Skills
	Conflict Resolution
	Customer Engagement
	Customer Relationship Building
	Negotiation
	Presentation Skills
Commercial Skills (Standard)	Active Cruise Systems
	Diagnosing Advanced Electronics
	On Board Lane Keeping Systems
	Onboard Radar Systems
	Recalibrating On Board Computers
Computer Skills (Standard)	All Data- OEM One Connect
	CCC1 Software
	Mitchell Estimating
	MS Office Intermediate
	Parts Trader/Procurement Software
	Quick Books Intermediate
	Scanning Tools
Continuous Improvement Skills	Inventory Control
	Leadership Skills
	Lean Production
	MSDS Sheets
	Problem Solving Skills
	Quality Improvement
	Registration Eval of Chemical Substances
	Root Cause Analysis
	Standard Operating Procedures
	Teambuilding
	VOC tracking

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Commercial Skills	3 Stage Color Match Blending Techniques
	Aluminum Repair
	Blueprinting
	Body Filler Methods
	Bonding
	Color Blending
	Color Tinting

Attachment 2 - Training Delivery and Curriculum Listing

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

	Estimating Platform Skills
	Estimators DRP Skills
	Mig Brazing/ Tig Welding
	Plastic Repair
	Seam Sealing/ Caulking Techniques
	Technical Estimating Skills
	Unibody Measuring
PL Justification and Details	
Explain the need for productive laboratory (PL) training	Up to 24 hours of Productive lab is needed as technicians and estimators coming into the industry lack hands-on training. Even those who attend vocational schools lack substantial hands-on training and skills. Eli's Auto has found that when these employees enter the workforce, they must be trained in a 1:1 environment. 1:2 environment will be on rare occasions during refinishing training where the instructor is working with Painters on color matching and blending.
Describe the Equipment/Processes to be used in delivering the PL training	Equipment to be used will be resistance spot welders, Mig and Tig welders, frame rack and measuring system, spray guns, spray booths, various hand tools, All-data IT, estimatics and system for estimators including Mitchell, CCC and ADP estimating systems and CCCOne Software. Also Car-O-Liner computerized measuring and alignment machines. Advanced vehicles systems scanners and diagnostic computer equipment.
Describe Trainer Qualifications	Trainers will be master-trained journey-level technicians with many years of experience. Technician trainers may be ICAR, ASE or master trained employees or outside consultants.
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
Ratio for Maximum Ratio When More than One Class	2
PLT Approval	Yes



TRAINING PROPOSAL FOR

Enterey, Inc.

17-0780

Panel Meeting Date: 12/08/2017

Regional Office: San Diego Regional Office

Analyst Name: Kellen Hernandez

Type of Proposal: Single Employer (SB), Small Business Program

Funding Source: SET

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$48,730.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$48,730.00	N/A	\$0.00	\$162,000.00

APPLICANT PROFILE

Company Summary	Enterey, Inc. (Enterey) is a minority-owned business management consulting firm serving established companies and emerging start-ups in the life sciences industry.
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Industry Sector(s)	Professional, Scientific, and Technical
Priority Industry	No
No. Employees (Applicant)	State: 33 US: 33 World Wide: 33
Turnover Rate (Applicant)	2.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	No

TRAINING PROFILE

Training Objective(s)	Training will focus on leadership, technical skills (process improvement/6 sigma, project management and supply chain analysis) and sales/marketing skills. Training will equip Enterey's staff with the skills necessary to execute business initiatives and improve core competencies companywide.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Owner, Retrainee	1	\$22.00	55	\$1,210	8 - 120
1	Retrainee	32	\$22.00	55	\$1,210	8 - 120
2	Job Creation – Retrainee Initiative Program, Retrainee	4	\$22.00	100	\$2,200	8 - 120

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

The Company delivers specialized services to help clients accomplish critical business goals. Enterey helps define specific strategies for its clients and execute those strategies. Enterey assists clients with integrating a newly acquired company's assets, regulatory processes, products and operations into the parent company's operations. Clients include companies in the biopharmaceutical, pharmaceutical and medical device manufacturing sectors. Enterey's services include project management, process improvement, supply chain management analysis and overall business development.

This will be Enterey's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>Enterey operates in a highly competitive industry and this creates two significant demands on its business. First, the Company needs to build strong and lasting business relationships with its clients and second, the Company must increase sales to grow its business.</p> <p>Enterey must build strong business relationships with the clients as a trusted advisor with strong leadership principals, sound project management techniques and expertise. The Company plans to accomplish these objectives by training its staff in best practice leadership, project management and technical skills. A significant portion of its training will focus on leadership skills to manage projects and ensure the process runs smoothly and efficiently from start to completion.</p> <p>The life science industry is rapidly changing and Enterey must stay up-to-date on the latest bio-tech equipment, products/therapies, innovation/technology, changes in laws/regulations and business models. In order to increase sales, the company must establish its presence in the marketplace. To do this, training will also include advanced sales and marketing skills.</p>
Training Infrastructure and Administrative Plan	<p>Enterey has retrained an administrative subcontractor, Training Refund Group (TRG) to assist with ETP project administration. In addition, the Company has designated a staff member to schedule and oversee all training and submit training rosters to TRG.</p>
Marketing Plan (MEC Only)	N/A

PROPOSED TRAINING PROJECT DETAILS

Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training applicable to their jobs in Business and Continuous Improvement Skills topics. Training will be delivered by expert in-house trainers or qualified vendors as needed.	

4. Additional Company or Training Project Details

4.1 Program Waivers

Enterey requests an increase to the Range of Hours from 8-60 to 8-120. This training project has a significant amount of hours dedicated to Leadership Skills training because Enterey consultants are regularly tasked with managing projects from start to completion. Leadership Skills training will account for a total of 56 hours and 30 employees are scheduled to participate in additional training that will take their total hours well above 60 hours of training. Six employees are scheduled to have over 100 hours (Executive, Business Development Manager, Consultants). In order for the Company to deliver additional training during this project beyond Leadership Skills they will need to increase the range of hours to 8-120.

4.2 Subcontractor Summary

Enterey has retained the services of the following Subcontractors.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Refund Group	Anaheim	\$ 3,000.00
Administrative	Training Refund Group	Anaheim	13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Leadership
	Life Science Industry Training
	Management Skills
	Marketing and Communication
	Organizational Development
	Project Management/ Technical Development
	Sales Skills
	Supply Chain Management
Continuous Improvement Skills	Six Sigma Green Belt



TRAINING PROPOSAL FOR
Frazer LLP
17-0923

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Joe Davey
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: \$42,900.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$42,900.00	N/A	\$0.00	\$52,576.00

APPLICANT PROFILE

Company Summary	Frazer LLP (Frazer) provides tax services, auditing and assurance services, asset accumulation and preservation, as well as consulting services to a variety of businesses and individuals.		
Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. Employees (Applicant)	State: 63	US: 65	World Wide: 65
Turnover Rate (Applicant)	4.00%		
Repeat Contractor	No		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will give workers the skills to meet client needs in a variety of industries, maintain current with relevant industry changes and keep pace with the competition.
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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	62	\$22.00	26	\$572	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	13	\$22.00	26	\$572	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1918 and headquartered in Brea, Frazer is a Certified Public Accounting firm that provides tax services, auditing and assurance services, asset accumulation and preservation and consulting services. Frazer's customers include businesses in Agriculture, Construction & Engineering, Colleges & Universities, Manufacturing & Distribution and Real Estate.

Frazer has two locations in Brea and Visalia. Both will participate in the Company's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>The need for training is driven by Frazer's continuous effort to expand its business. Frazer has been able to remain competitive by expanding into non-traditional industries, such as Agriculture, Colleges and Universities, and Real Estate, as well as Construction and Engineering, and Manufacturing and Distribution. Staff must train in these industries to remain current on the latest issues and regulations.</p> <p>To respond to industry changes, Frazer has developed a company-wide training program to increase staff knowledge of regulatory changes, enhance technical skills and improve overall performance. Employees also must be trained on the most recent financial information and software applications available to keep pace with industry and client requirements.</p> <p>In addition, the Company must improve efficiency in its operations as it expands its services into a variety of industries. Therefore, Frazer also needs to train its workers in best practices, communication and presentation skills, planning, work-flow processes and effective client development.</p> <p>The Company must provide workers with the knowledge essential to delivering sound financial advice and tax planning strategies.</p>
Training Infrastructure and Administrative Plan	<p>The Controller will oversee all administration of the project. In addition, the Managers of each department have been briefed on the process and documentation requirements. Frazer has also obtained Corporate Tax Incentives to assist with administration.</p> <p>Training will be delivered 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	
All occupations will receive training applicable to their jobs in Business, Commercial, Computer, Continuous Improvement and Management Skills.	

4. Additional Company or Training Project Details

Retrainee - Job Creation

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

Frazer is expanding through the purchase of another accounting firm. Once these employees become Frazer employees, they qualify as newly-hired retrainees.

Frazer has committed to hiring 13 new employees (Group Number 2). The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into “net new jobs” as a condition of contract.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Frazer has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Corporate Tax Incentives LLC	Rancho Cordova	No Cost
Administrative	Corporate Tax Incentives LLC	Rancho Cordova	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Client Development
	Client Relationship Management
	Customer Service
	Effective Communication
	Firm Administration
	Marketing and Networking Skills
	New Products and Services
	Presentation Skills
Commercial Skills (Standard)	Accounting and Auditing
	Best Practices
	Depreciation & Cost Recovery
	Estate Planning
	Farmers Tax and Accounting
	Federal, State & Local Tax Credits
	Financial Institution Auditing Principles
	Governmental Auditing/Environment
	Regulatory Review
	Securities Exchange Commission Rules
	Tax Compliance
	Tax Regulations
Computer Skills (Standard)	Administrative Software
	Checkpoint Software
	Excel, Word, Outlook, Powerpoint
	Finance/Accounting Tools
	Trackstar Software Systems
	Wolters Kluwer Tax and Accounting CCH Software
Continuous Improvement Skills	Audit Techniques
	Coaching
	Planning
	Project Management
	Scheduling
	Team Building
	Work-Flow Processes
	Work-Product Improvement
Management Skills	Effective Client Development
	Employee Performance Improvements
	Leadership
	Motivating Individuals
	Problem Solving & Decision Making
	Project Time Management



**TRAINING PROPOSAL FOR
Fruth Custom Plastics, Inc.
17-0869**

Panel Meeting Date: 12/8/2017
Regional Office: San Diego Regional Office
Analyst Name: Joe Davey
Type of Proposal: Single Employer
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 42,066.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 42,066.00	N/A	\$ 0.00	\$ 64,350.00

APPLICANT PROFILE

Company Summary	Fruth Custom Plastics and its subsidiary, CF&B Manufacturing, Inc., provide a variety of plastic packaging solutions for companies in the aerospace, medical, and pharmaceutical industries.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 139	US: 139	World Wide: 139
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Provide training on equipment and processes to employees to meet the needs of a growing company.
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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	41	\$ 18.00	57	\$ 1026	8 - 200

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Headquartered in Placentia and founded in 1986, Fruth Custom Plastics, Inc. (Fruth) provides a wide array of high-quality extruded plastic packaging and paper products to many industries including the electronic, medical/pharmaceutical, and aerospace industries. CF&B Manufacturing, Inc. (CFB), a subsidiary of Fruth, will also participate in this training project.

2. Current Training Project Details

Purpose of Training	<p>The need for training is due to continuous changes in quality requirements. Many of Fruth's customers require the Company to meet the industry standards (Cleanliness Level 50 per IEST-STD-CC 1246 (formerly MIL-STD-1246) and NASA JPR 5322.1, KSC-C-123, class 100, and class 10,000) for many of its products. Training will help the Company meet or exceed these standards.</p> <p>In addition to changes in quality requirements, Fruth also faces a generational transition of its aging workforce. The Company needs to improve the skills of its less experienced employees. These employees will require substantial training in manufacturing skills: packaging techniques, cleanroom standards and regulations, machine technology, and troubleshooting and maintenance. Manufacturing Skills will consist of both Class/Lab and Productive Lab delivery to increase machine operating skills and improve productivity and efficiency.</p>
Training Infrastructure and Administrative Plan	<p>The Company Vice President will oversee project administration. Each department manager has been briefed on administrative processes and documentation requirements. The Company will also receive assistance from Corporate Tax Incentives to assist with administrative duties, such as enrolling trainees, tracking training hours, deliver monthly compliance results, invoicing for reimbursement, and meeting with ETP staff.</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

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1 will receive training applicable to their jobs in Business and Computer topics listed under Attachment 2.	
Delivery Method/Level	Productive Laboratory
Summary	
Trainees will receive PL training in Manufacturing Skills topics listed under Attachment 2.	

4. Additional Company or Training Project Details

N/A

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Corporate Tax Incentives LLC	Rancho Cordova	\$ 3,785.94
Administrative	Corporate Tax Incentives LLC	Rancho Cordova	Not to exceed 13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Building Relationships
	Change Management
	Contract Negotiation
	Creative Problem Solving
	Customer Service
	Effective Decision Making
	Estimating
	Finance/Accounting Procedures
	Leadership Skills/ Training
	Negotiating
	Payroll/ Accounting
	Planning & Goal Setting
	Presentation Skills
	Product Knowledge
	Project Management
	Sales Knowledge
Work Processes and Procedures	
Computer Skills (Standard)	Company Software Time Entry
	Database Management
	DocuSign
	Intermediate/Advanced Microsoft Excel
	Intermediate/Advanced Microsoft Word
	Intermediate/Advanced PowerPoint
	MRP Software
	MS Project
	Project Management Software
	Salesforce/CRM
	Web Applications
Continuous Improvement Skills	ISO Training
	Process Improvement
	Quality Improvement
	Statistical Process Control
Manufacturing Skills (ME) (Standard)	Antistatic Testing Equipment
	Die Cut Operation
	Elendorf Testing Equipment
	Heat Sealers Set Up and Control
	Industry Based Applications
	Packaging
	Paper Converting Machine
Printing Press Operation	

Attachment 2 - Training Delivery and Curriculum Listing

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

Quality Control Operator Reports
Reprocessing Unit Control and Setup
Rod Seal Test Setup and Control
Rotating Dies Setup and Control
Scheduling Software Setup and Control
Setup and Control of Automatic Tape Equipment
Setup and Control of Particle Counter
Setup and Control of Resin Machine
Setup and Control of Slitting Equipment
Sheeting Operation
Tensile Strength Nuclear Green Testing Equipment and Software
Vertrod Vacuum Seal Set Up and Control
Winding Equipment

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	Automatic Tape Equipment
	Die Cut Machine
	Paper Converting Machine
	Particle Counter Machine
	Printing Press Machine
	Reprocessing Machine
	Resin Machine
	Rotating Dies
	Sealer Machine
	Slitting and Sheeting Machine
	Winding Equipment

<i>PL Justification and Details</i>	
Explain the need for productive laboratory (PL) training	Productive Laboratory (PL) will focus on building Manufacturing Skills within the areas of Production and maintenance. Trainees may produce goods for profit as part of the training, in the courses identified under the Curriculum. Due to the nature of their services, certain training cannot be replicated in a class/lab environment. PL training will allow practical, real-world experience in a working environment without creating an excess of waste.
Describe the Equipment/Processes to be used in delivering the PL training	Equipment used during Productive Lab Training: Particle Counter, Automatic Tape Equipment, Printing Press Operation, Winding Equipment, Rotating Dies, Paper Converting Machine, Reprocessing Machine. Training will be offered to Production Staff. Fruth aims to cross-train employees on all machines currently being used in the manufacturing process. Trainees will receive up to 10 hours of PL.
Describe Trainer Qualifications	Fruth CF& B will use subject matter experts for PL training on machinery. The instructors will be dedicated to training delivery during all hours of PL training.

Attachment 2 - Training Delivery and Curriculum Listing

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

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	1
PLT Approval	Yes	

DELEGATION ORDER



**Training Proposal for:
Goorin Bros., Inc.**

Small Business

ET18-0142

Approval Date: October 20, 2017

ETP Regional Office: San Francisco Bay Area

Analyst: R. Jackson

CONTRACTOR

- Type of Industry: Manufacturing
Retail
Priority Industry: Yes No
- Number of Full-Time Employees
California: 46
Worldwide: 70
Number to be trained: 39
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: \$49,686
- In-Kind Contribution: \$65,000

TRAINING PLAN TABLE

Job No.	Job Description	Type of Training	Estimated No. of Trainees	Range of Hours		Average Cost per Trainee	Post-Retention Wage
				Class / Lab	CBT		
1	Retrainee SB <100 Priority Rate	Business Skills, Comm'l Skills, Computer Skills, Cont. Imp.	39	8-60	0	\$1,274	\$17.63
				Weighted Avg: 49			

- Reimbursement Rate: \$26 SB Priority
- County(ies): San Francisco, Alameda, Los Angeles, San Diego, Santa Barbara
- Occupations to be Trained: Owner, Administrative Staff, Technical Staff, Production Staff, Managers
- Union Representation: Yes
 No
- Health Benefits: \$2.13 per hour

SUBCONTRACTORS

- Development Services: Prospect Consulting, San Francisco, provided development services for a flat fee of \$2,000.
- Administrative Services: Prospect Consulting will also provide administration services for a fee not to exceed 13% of payment earned.
- Training Vendors: N/A

OVERVIEW

Established in 1895 and headquartered in San Francisco, Goorin Bros., Inc., (Goorin)(www.goorin.com) designs, manufactures, assembles, distributes and sells hats throughout its US locations and Canada.

This is Goorin's fourth ETP proposal and the second in the past five years. No Substantial Contribution applies as location has not earned over \$250,000.

Goorin's first Agreement funded training at its four California facilities (headquarters, warehouse, and two retail stores). Training concentrated on Lean manufacturing to improve supply chain

management and Leadership and problem-solving to resolve production issues. The training also included sales/marketing, product knowledge and Computer Skills.

During the second Agreement, Goorin opened a total of six more stores, which allowed it to return previously out-sourced functions in-house. Therefore, it needed to deliver training in product design and development, manufacturing processes, sales, marketing and computer skills.

The last contract focused on SAP upgrades, new technology and software related to controlling inventory along with training needed to support the expansion of product lines and sales.

This new proposal includes class lab and e-learning courses in Business, Commercial, Computer and Continuous Improvement Skills at 10 California locations. Training will help facilitate changes in practices and introduce the new technology needed to support increased volume in manufacturing occurring at a New Jersey location (recent acquisition), which is all driven by an expanding customer base in global markets.

Training Plan

The new hat lines and technology systems related to inventory control and sales, require periodic skill upgrades. Employees need additional training in similar areas due to recent company software upgrades (SAP and MICROS) to maintain and improve customer support and speed delivery times. The proposed training supports new market expansions into the Mexico and South America regions. Goorin's training goals include:

- Reducing financial data management processing time by improving operations and individual user technical skills to Improve customer response times by 20%.
- Improving efficiency by 5% and reducing rework by 7% company-wide.
- Achieving annual sales growth rate of 5%.

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

Business Skills: Training will be delivered to Managers, Administrative and Production Staff to improve accounting processes and transition Bold Hat Maker's into Goorin's existing processes. Training also includes the key elements for managing change within the Company's rapid business growth. Additionally topics such as Social Media and Digital marketing Integration reinforces Goorin's goal of further penetrating international markets with the world-wide web.

Computer Skills: Training will be provided to all occupations on the integration of the new and upgraded SAP and MICROS systems. Training will further ensure accurate communication across multiple platforms and systems. Topics such as New Technology for Growth and Magento will be delivered.

Continuous Improvement – Training will be provided to all occupations except Owner. Training includes inventory management, LOCATE Omnichannel, to coordinate inventory in the warehouse and across its stores. Administrative and Production Staff will receive training in managing Third Party Logistics (3PL) Coordination to speed customer orders. 3PL is related more specifically to storage of products and materials managed by a third party. Overall these topics help improve efficiency and manage growth. Continuous Improvement training will be delivered companywide.

Commercial Skills: Training will be provided to Managers, Administrative and Production Staff, to boost knowledge of manufacturing processes to assist in the absorption of a new manufacturing

facility in New Jersey. Topics such as Manufacturing Quality Control and Understanding the Mechanics of Manufacturing will be delivered to assist staff to meet the company's quality standards and production growth goals.

Contract Term Limitation

Goorin states that a 24-month Agreement will provide the time needed to train because the planned training happens in train-the-trainer phases that extend beyond a nine training months' period. The Company is requesting a two-year term, the maximum allowable by ETP.

Commitment to Training

Goorin spends \$35,000 annually on training for its California facilities. Training includes topics such as Fundamentals of Sales, Hat Maintenance, Excel, and Opening and Closing Store Processes.

➤ Training Infrastructure

Goorin is ready to begin training in October 2017. The Company has a dedicated training coordinator and has retained Prospect Consulting to assist them with project administration.

RECOMMENDATION

Staff recommends approval of this proposal including the request for a two year contract term.

PRIOR PROJECTS

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

Agreement No.	Location (City)	Term	Approved Amount	Payment Earned \$ %
ET13-0393	Statewide	5/10/13 -5/9/15	\$93,600	\$93,600 (100%)

Exhibit B: Menu Curriculum

Class/Lab Hours

8-60

Trainees may receive any of the following:

BUSINESS SKILLS

- + Accounting Processes for New In-House Manufacturing
- + In-House Manufacturing Business Strategies to Manage Change and Growth
- + Social Media and Digital Marketing Integration

COMMERCIAL SKILLS

- + Manufacturing Quality Control
- + Understanding the Mechanics of Manufacturing

COMPUTER SKILLS

- + New Technology for Growth (Software Training)
 - Magento

CONTINUOUS IMPROVEMENT

- + LOCATE Omnichannel Inventory Management System
- + Third Party Logistics (3PL) Coordination

E-Learning Hours

8 – 60

BUSINESS SKILLS

- + Accounting Processes for New In-House Manufacturing
- + In-House Manufacturing Business Strategies to Manage Change and Growth
- + Social Media and Digital Marketing Integration

COMMERCIAL SKILLS

- Manufacturing Quality Control
- + Understanding the Mechanics of Manufacturing

COMPUTER SKILLS

- + New Technology for Growth (Software Training)
 - Magento

CONTINUOUS IMPROVEMENT SKILLS

- + LOCATE Omnichannel Inventory Management System
- + Third Party Logistics (3PL) Coordination

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



**TRAINING PROPOSAL FOR
La La Land Production & Design
17-0823**

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Mark Reeves
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 18,720.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 18,720.00	N/A	\$ 0.00	\$ 16,160.00

APPLICANT PROFILE

	Headquartered in Los Angeles, La La Land Production & Design (LaLaLand) is a manufacturer of leather fashion accessories.
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Industry Sector(s)	Manufacturing
Priority Industry	Yes
No. Employees (Applicant)	State: 32 US: 32 World Wide: 32
Turnover Rate (Applicant)	2.00 %
Repeat Contractor	No
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	LaLaLand must upgrade the skills of its employees due to recent automation improvements to enhance the Company's manufacturing processes.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Job Creation – Retrainee Initiative Program, Retrainee	1	\$ 26.00	60	\$ 1560	8 - 60
2	Retrainee	11	\$ 26.00	60	\$ 1560	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2009, LaLaLand specializes in exotic and leather fashion accessories, line development, and sample production. The Company's capabilities include designing, sketching, logo embossing, private labeling, and cutting for all types of leather and synthetic materials. Products include shoes, handbags, belts, and other small goods produced from exotic skins. Customers include high-end fashion designers such as Louis Vuitton, Marais, John Geiger, and Newbark. This Company is affiliated with Socal Accessory Production Inc. by common ownership, which has elected to manage each ETP project independently for administrative purposes.

2. Current Training Project Details

Purpose of Training	<p>LaLaLand recently purchased new manufacturing equipment including CAM cutting machines, Lasting machines, automatic sewing machines, leather cleaners, hot stamping machines, and CAM sewing machines. The Company will provide staff with skills to use and maintain these equipment. Additionally, the Company will provide extensive cross-training on various systems and equipment to create a more flexible workforce. The Company will be hiring a Sewer during the term of this Contract.</p> <p>LaLaLand has developed a comprehensive training plan that covers many facets of the Company's overall business functions. Training will allow the Company to meet strict customer specifications, increase production capacity, and expand current product lines.</p> <p>Training will take place at LaLaLand's facility in Los Angeles. Instruction will be provided by in-house subject matter experts. The Company may also utilize specialized vendors, if necessary.</p>
Training Infrastructure and Administrative Plan	LaLaLand spends approximately \$25,000 annually on training. The Company's training and leadership team will deliver, schedule, and document training. LaLaLand has also retained an administrative consultant to ensure that all training and documentation adhere to ETP requirements.
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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Business Skills, Computer Skills, and Continuous Improvement. Designers, Sewers, Machinists, Cutters, and Pattern Makers will also receive Manufacturing Skills, Hazardous Materials, and Literacy Skills, as shown in Attachment 2.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
All occupations will receive up to six hours of CBT Business Skills training, based on job duties.	

4. Additional Company or Training Project Details

Retrainee – Job Creation

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

LaLaLand has committed to hiring one new Sewer position (Group 1) to support the Company's plan to expand its existing business capacity and increase its product line. 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.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Judiths Training Services	Los Angeles	\$ 3,400.00
Administrative	Judiths Training Services	Los Angeles	Not to exceed 13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Accounting
	Administration
	Business Administration
	Business Planning
	Business report writing and editing
	Coaching Procedures
	Conflict Management
	Credit Card Sales
	Customer needs /complaints
	Customer Relations
	Decision making
	Financial Strategy
	Handling Customer Requests
	Identifying Customer Needs
	Interpersonal Skills
	Inventory Control
	Leadership
	Marketing
	Monitoring
	Motivation
	Negotiating
	New production cell planning
	Payroll
	Process/procedure/evaluations
	Product Knowledge
	Production planning
	Refunds and Exchanges
	Resolving Complaints
Team Building	
Telephone Skills	
Voiding Transactions	
Computer Skills (Standard)	Accounting Systems
	Advanced Adobe InDesign
	Advanced Adobe Photoshop
	Advanced Microsoft Excel
	Advanced Microsoft Power Point
	Comelz cutting machine computer operation

Attachment 2 - Training Delivery and Curriculum Listing

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

	Computer Programming/Pattern Making
	Computerized Scheduling
	Cost Accounting
	Elitron cutting machine computer operation
	Elitron pattern making for Handbags
	Elitron Pattern making for shoes
	Engineering/document Control
Computer Skills (Standard)	General Accounting
	Integrated Material Management
	Intermediate Adobe InDesign
	Intermediate Adobe Photoshop
	Intro to Adobe InDesign
	Intro to Adobe Photoshop
	Inventory Control
	Juki Computer Programing for automatic sewing
	Local Area Networks (LAN)
	Material Resource Planning
	Network Management
	Ormac Computer set up and operation
	Payroll
	Pfaff Programing for automatic sewing machine
	Purchase Order Tracking
	Sales Forecasting
	World Wide Web (WWW)
Continuous Improvement Skills	Decision Making
	Interpreting Charts and graphs
	Just In Time process (JIT)
	Leadership Skills for Frontline Workers
	Problem Solving
	Process Improvement
	Production Operations/workflow
	Production Scheduling
	Quality Concepts
	SPC Methods to monitor quality control
	Strategic Planning, Evaluations, Monitoring
	Team Building
	Total Quality Management
Hazardous Materials Skills	Hazardous chemical cleaning/handling
	Hazardous material handling
	Hazardous waste handling

Attachment 2 - Training Delivery and Curriculum Listing

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

Literacy Skills	Vocational English as a second language
Manufacturing Skills (ME) (Standard)	Cross Training in production equipment/skills
	Cut and crease using Galli machine
	Fabric Stitching
	Folding by hand
	Folding using folding machine
	Gluing using latex spray gluing machine
	Hot stamping and operating the hot stamp machine
	Inspection and Final touch up
	Knife cutting
	Lasting close shoes
	Lasting sandals
	Leather cleaning of excess paint
	Leather cutting by hand
Manufacturing Skills (ME) (Standard)	Leather cutting with Automatic CAM machine
	Leather cutting with Hydraulic Presser
	Leather defect detection training
	Leather evaluation training
	Leather stitching technique
	Machine lasting
	Outsole and insole gluing application
	Outsole eva preparation
	Painting using STF painting booth
	Ruffing and marking lasted shoe
	Skiving using skiving machine
	Splitting using splitter machine
	Toe puff machine operation
Upper conforming machine training	

<i>Delivery Method /Level</i>	<i>E-Learning ±Computer Based Training (CBT)</i>	
Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	How to Deliver Grand Slam Customer Service	1.00
	Managing Chaos and Pressure at Work	1.00
	Managing Difficult Situations/Emotions	1.00
	Managing Employees who are Stretched to the Max	1.00
	Managing Heavy Workloads	1.00
	Top 10 Survival Skills for First Time Supervisors	1.00



TRAINING PROPOSAL FOR
Lin Engineering, Inc.
17-0744

Panel Meeting Date: 12/08/2017
Regional Office: San Francisco Bay Area Regional Office
Analyst Name: Samantha Wang
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:		\$ 26,286.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 26,286.00	N/A	\$ 0.00	\$ 25,000.00

APPLICANT PROFILE

	Lin Engineering, Inc. designs and manufactures a variety of step motor applications.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 89	US: 89	World Wide: 89
Turnover Rate (Applicant)	0.00 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training is focused on four new equipment.
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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	89	\$ 26.00	11	\$ 286	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	4	\$ 26.00	8	\$ 208	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1992 and headquartered in Morgan Hill, Lin Engineering specializes in the design and manufacture of step motor applications such as hybrid step motors, drivers, optical encoders, spur and planetary gearboxes, and step motor drives.

Customers include companies that make high grade surveillance cameras, semiconductors, automation, packaging, and medical devices for eye surgery equipment.

2. Current Training Project Details

Purpose of Training

This will be Lin Engineering's third ETP Contract, and the second within the last five years. During the previous Agreement, the Company delivered training in LEAN Manufacturing and expansion and diversification of its product line specifically for the solar industry.

The new proposal will build upon the previous ETP-funded training with a focus on training on four new equipment: Electrical Test Unit, Label Laser Engraving, CNC for Lead Screw Business, and Auto 4 Head Crew Driver Unit. Training will enable Lin Engineering to meet customer demands.

In the past years, Lin Engineering has had difficulties hiring and retaining employees in the competitive and expensive Bay Area market. The number of company employees has been difficult to maintain. Additionally, many of the newly hired employees have little or no experience. The manufacturing process requires specialized skills as several parts require pieces of comprehensive techniques.

Lin Engineering must improve efficiency to remain competitive. To do so, the Company has purchased four new equipment:

- Electrical Test Unit - Provides a comprehensive Portable Appliance Testing and repair service to ensure safe use of all electrical items.
- Label Laser Engraving - Creates company logos, serial numbers, labels, images, Quick Response Codes and photos.
- CNC for Lead Screw Business - For fast feeds and precision. This equipment includes Ribbed Cast Iron and Tool Turrent.
- Auto 4 Head Crew Driver Units - Automatic screw feeding and screw driving with four spindle turnkey system.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Class/Lab and Productive Lab training will be delivered at Lin Engineering's Morgan Hill facility by qualified internal staff. The Director of Human Resources will oversee training. The managers of each department will be responsible for scheduling and training documentation. The Company has also retained Corporate Tax Incentives to assist with administrative duties.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
Training topics include Product Knowledge, Leadership Skills, Engineering Design Software, and Kaizen. This training will ensure that staff will have through knowledge when working on the product and assisting customers.	

Delivery Method/Level	Productive Laboratory
Summary	
Productive Lab topics include Equipment Operation, Good Manufacturing Processes, and Diagnostics, which will be conducted on the production floor. This training ensures Production and Maintenance Staff will have the proper knowledge when working on different machines.	

4. Additional Company or Training Project Details

Productive Laboratory

Productive Laboratory (PL) training will be provided to the Production and Maintenance Staff on all machines currently being used in the manufacturing process. PL training will be delivered by qualified in-house staff and may require the use of outside vendors. Staff will receive 2 to 16 hours of PL training.

PL training will be conducted with a 1:2 trainer-to-trainee ratio. The 1:2 ratio is needed because the equipment requires a team of two workers.

Retrainee - Job Creation

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

In an effort to meet customer demands, Lin Engineering has upgraded its facilities with new

PROPOSED TRAINING PROJECT DETAILS

equipment. The Company is planning to hire four new employees: two Production Staff, one Quality Staff, and one Sales and Marketing Staff during the course of this Agreement. The date-of-hire for trainees will be within the three-month period before contract approval or within the term-of-contract. These trainees will be hired into "net new jobs" as a condition of contract.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Corporate Tax Incentives LLC	Rancho Cordova	\$ 2,102.88
Administrative	Corporate Tax Incentives LLC	Rancho Cordova	Not to exceed 13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET12-0319	Morgan Hill	03/05/2012-03/04/2014	\$ 71,188	\$ 25,053	35%
Notes	Lin Engineering earned 35% of the approved amount. Low performance was due to an increase in business demands which resulted in less time to release trainees for training. The Company has reduced its current training plan and right-sized this proposal to the amount earned in the previous Contract.				

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Customer Service
	Finance/Accounting procedures
	Internal Audits
	Leadership Skills
	MAP Management Training
	Negotiation Training
	Process Improvement
	Product Knowledge
	Project/Program Management
	Sales
	Salesforce/CRM
Time Management	
Computer Skills (Standard)	Adobe
	Autodesk Software
	Document Control
	Engineering Design Software
	Pivot Tables
	Web Applications
Manufacturing Skills (ME) (Standard)	5S
	Distribution/Supply Chain/Logistics Procedures
	Inspection Techniques
	Kaizen
	Lean Manufacturing

<i>Delivery Method /Level</i>	<i>Productive Laboratory</i>
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	Diagnostics, Service and Repair
	Equipment Operation, Maintenance & Troubleshooting
	Fabrication
	Good Manufacturing Processes
	Shop Equipment & Tools
PL Justification and Details	
Explain the need for productive laboratory (PL) training	Lin Engineering believes that PL training is the most effective way to ensure that employees process knowledge is transferred, retained, and further developed.
Describe the Equipment/Processes to be used in delivering the PL training	Training will be offered to Production Staff and Maintenance Staff. Lin Engineering aims to have redundancy on all machines, which means that production and maintenance staff will cross train on all machines currently being used in the manufacturing process. Familiarity with a majority of the machines will assure employee support during lean months and maintain the flow of the production process.

Attachment 2 - Training Delivery and Curriculum Listing

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

Describe Trainer Qualifications	Training will delivered by a combination of in-house staff and outside vendors.	
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
Managed Solution LLC
17-0874**

Panel Meeting Date: 12/08/2017
Regional Office: San Diego Regional Office
Analyst Name: Kellen Hernandez
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$49,400.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$49,400.00	N/A	\$0.00	\$168,000.00

APPLICANT PROFILE

Company Summary	Managed Solution LLC (MSI), provides information technology (IT) management services specializing in licensing software, systems integration, mobile workforce solutions, enterprise mobility, backup disaster & recovery and security solutions.
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Industry Sector(s)	Professional, Scientific, and Technical
Priority Industry	Yes
No. Employees (Applicant)	State: 70 US: 70 World Wide: 70
Turnover Rate (Applicant)	6.00 %
Repeat Contractor	No
High Unemployment Area	No

	N/A
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TRAINING PROFILE

Training Objective(s)	Training will focus on Computer Skills for Engineers and Business Skills for Managed Services, Project Managers and Sales & Marketing staff. Training will enable staff to become highly skilled, execute business initiatives, and improve companywide efficiencies.
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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	70	\$26.00	25	\$650	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	5	\$26.00	30	\$780	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2002 and located in San Diego, MSI provides a full spectrum of IT services. Customers range from small businesses to fortune 1000 corporations, and represent a range of industries including retail, real estate, manufacturing, healthcare, government, education and finance.

MSI is part of Microsoft's Partner Network and is designated as a Gold and Silver certified service provider (CSP) of numerous Microsoft IT solutions. The Company assists its customers to move their IT assets into the cloud. As a CSP, the Company helps with licensing Microsoft products, and design and implement specific Office 365 applications. In addition, MSI provides Managed Solutions Proprietary HelpDesk services to support their new Microsoft IT applications.

This will be MSI's first ETP Agreement.

2. Current Training Project Details

Purpose of Training	<p>The IT industry is rapidly changing, therefore, to remain competitive MSI is expanding its business capacity with a focus on increasing sales, production and market share.</p> <p>The Company must train its Professional Services Engineers (PSE) on the changes in MIS's business model. In the past, PSE's provided services on legacy hardware and onsite technology, servers, hardware and software. Companies are now less reliant on on-site servers and software and are requesting cloud based solutions. This creates multiple business opportunities for MSI to provide cloud based solutions and expand IT services/applications. Thus, PSE's must receive training focused on cloud based solutions, system integration, cloud based technologies and IT applications.</p> <p>Sales Staff must train in customer needs, build and recommend IT solutions and provide implementation assistance. Training will focus on new value propositions, new pricing models (pay as you go compared to buy once and own) and product knowledge.</p> <p>The rapid growth of MSI's customer base is important to accomplish its goals of increasing sales, production and market share, but it also creates the need to train staff in IT services, manage their own proprietary platforms (HelpDesk) and execute specialized sales techniques.</p>
Training Infrastructure and Administrative Plan	<p>The People & Culture Manager will oversee all training and internal administration, including training delivery, scheduling and documentation. Training will be delivered by in-house experts at the Company's single location in San Diego. The Company has a detailed training schedule and it ready to start training upon approval. MSI has retained Corporate Tax Incentives LLC as an</p>

PROPOSED TRAINING PROJECT DETAILS

	administrative consultant to ensure that all training records meet ETP compliance.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training applicable to their jobs in Business and Computer Skills topics listed under Attachment 2.	

4. Additional Company or Training Project Details

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

MSI has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Corporate Tax Incentives LLC	Rancho Cordova	\$5,000.00
Administrative	Corporate Tax Incentives LLC	Rancho Cordova	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide details on training, curriculum, and program characteristics.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Backup/Disaster Recovery
	Building Relationships
	Change Management
	Coaching/Mentoring
	Communication Skills
	Conflict Resolution
	Contract Negotiation
	Customer Service
	Delivering Feedback
	Developing and Coaching Employees
	Internet Of Things
	Leadership Skills/ Training
	Payroll/ Accounting
	Planning & Goal Setting
	Presentation Skills
	Problem Solving/Decision Making
	Process Improvement
	Product Knowledge
	Project Management
	Risk Management
	Sales
	Software Engineering
	Team Building
	Time Entry
	Time Management
	Work Processes and Procedures
Computer Skills (Standard)	Amazon Web Services
	Microsoft Active Directory
	Microsoft ADFS
	Microsoft Azure
	Microsoft CSP/Licensing
	Microsoft Office 365
	Microsoft SharePoint
	Microsoft Skype for Business
	Microsoft Systems Center
	MS Office
	MS Project
	Networking (Computer)
	Project Management Software

Attachment 2 - Training Delivery and Curriculum Listing

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

	Salesforce/CRM
	Web Applications



**TRAINING PROPOSAL FOR
MB CALRAM LLC
17-0687**

Panel Meeting Date: 12/8/2017
Delegation Order Date: 10/20/17
Regional Office: North Hollywood Regional Office
Analyst Name: Jela Romero
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:		\$ 5,200.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 5,200.00	N/A	\$ 0.00	\$ 9,620.00

APPLICANT PROFILE

Company Summary	<p>CalRAM provides powder-bed fusion Additive Manufacturing metal printing services. Located in Camarillo, it has the capacity to produce a full range of highly complex additive manufactured parts for various industries and offers both laser and electron beam capabilities in its additive manufacturing process. The Company also provides services such as in-house multi-axis Computer Numerical Control machining and has Coordinate Measuring Machine capability that can handle large volumes of demand ranging from prototyping to full-scale production.</p>
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 20	US: 20	World Wide: 20
Turnover Rate (Applicant)	0.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	CalRAM aims to upgrade employee skills to meet new standard in the Company's improved operations and manufacturing processes, and train staff on newly installed equipment.
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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	20	\$ 26.00	10	\$ 260	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

MB CalRAM LLC, (CalRAM), seeks ETP funding for retraining. Founded in 2005, the Company is headquartered in Camarillo. The Company provides powder-bed fusion and laser based additive manufacturing to the aerospace, defense, power generation, and oil and gas industries.

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	CalRAM continues to improve production process by modifying existing practices as well as keeping up to date with requirements in the 3D Additive Manufacturing Industry. Training in this proposal will provide employees skills in the proper use and operation of newly installed equipment: Additive Manufacturing Electronic Beam Melting and Laser level 2 and 3; and provide training in Business Skills, Continuous Improvement, Hazardous Materials and Manufacturing Skills which will enhance staff skills and knowledge in performing their job effectively and efficiently.
Training Infrastructure and Administrative Plan	CalRAM is ready to start training upon approval of this proposal. The Company assigned two administrators from its Human Resources and Quality Control Departments to work closely in the enrollment process, training data collection, and data entry into the ETP online portal for this Agreement.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
<p>Business Skills – This training will be provided to all staff to improve their skills in customer service and best marketing and management practice.</p> <p>Continuous Improvement – This training will be offered to all staff which will provide them skills in AS9100 upgrade and product audit training that will improve the quality of CalRAM products and services.</p>	

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
<p>Hazardous Materials – This training will be offered to lead persons to gain better knowledge and training in handling hazardous materials.</p> <p>Manufacturing Skills – This training will be provided to technicians and production staff to improve their skills in new manufacturing techniques and processes.</p>	

Delivery Method/Level	Productive Laboratory
Summary	
<p>Productive Laboratory (PL) – trainees may produce goods for profit as part of the training, in the courses identified under the Curriculum. For PL, the trainer-to-trainee ratio cannot exceed 1:1. The maximum hours per-trainee may be capped, as shown in the Curriculum. CalRAM's Laser Technicians will receive 24 hours of productive laboratory training on the newly installed equipment: Additive Manufacturing Electronic Beam Melting (EBM) and Laser 2 and 3. CalRAM will adhere to a 1:1 trainer-to-trainee ratio.</p>	

4. Additional Company or Training Project Details

This is CalRAM's second ETP Agreement, and its second in the last five years. With the recent installation of new equipment, Additive Manufacturing Electronic Beam Melting and Laser 2 and 3, employees will need substantial training in operating these machineries effectively which are the core of CalRAM's manufacturing processes and services. CalRAM also modified its manufacturing and operational processes to accommodate new product demands requiring additional skills training for its employees in areas of Business Skills, continuous Improvement, Hazardous Material and Manufacturing Skills.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET15-0197	Camarillo	08/04/14 - 08/03/16	\$9,620.00	\$5,397.00	56%

PROPOSED TRAINING PROJECT DETAILS

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
Notes	<p>CalRAM's poor performance under ET15-0197 was an effect of the former project staff manager leaving the Company during the contract term. Unfortunately, training hours were not properly captured and recorded during that interim period until the time of turnover. According to Mr. Hernandez, CalRAM Quality Manager, the Company has since reassessed their training needs and goals for this new ETP proposal and established reinforcement in the project administration by assigning Mr. Hernandez to personally oversee this project along with another staff from Operations responsible for the collection and uploading of training data into the ETP database.</p>				

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Aerospace Marketing
	Customer Service
	Management Practices
Continuous Improvement Skills	AS9100 REV D Transition
	Auditor Training
Hazardous Materials Skills	Hazardous Material Handling
Manufacturing Skills (ME) (Standard)	CNC Basics
	EBM/ Laser Level 2& 3
	Grit Blasting/Deburring
	Powder Lab Training

Delivery Method /Level	Productive Laboratory
Training Type (Level)	Planned Course Offerings
Manufacturing Skills (ME) (Standard)	CNC Basics
	EBM/ Laser Level 2& 3
	Grit Blasting/Deburring

PL Justification and Details

Explain the need for productive laboratory (PL) training	EBM, CNC, Laser Technicians must receive continued training as demands for 3D Additive Manufacturing keep growing.	
Describe the Equipment/Processes to be used in delivering the PL training	EBM, CNC, Laser	
Describe Trainer Qualifications	Management Certified Personnel Machine/Equipment Suppliers	
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	1
PLT Approval	Yes	



**TRAINING PROPOSAL FOR
MBK Enterprises, Inc. dba MBK Tape Solutions
17-0908**

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Margarita Paccereilli
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 49,140.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 49,140.00	N/A	\$ 0.00	\$ 65,000.00

APPLICANT PROFILE

Company Summary	MBK Enterprises, Inc. dba MBK Tape Solutions (MBK) is a manufacturer of custom adhesive tapes, films, foams and other flexible materials for component parts and end-user tape products.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 50	US: 50	World Wide: 50
Turnover Rate (Applicant)	9.00 %		
Repeat Contractor	Yes		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	MBK will be installing a new, state-of-the art Clean Room. The Company will train employees in Clean Room procedures. Additionally, the Company will also train employees on its new Enterprise Resource Planning system.
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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	42	\$ 26.00	45	\$ 1170	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 1971 and located in Chatsworth, MBK manufactures custom adhesive tapes, films, foams and other flexible materials for component parts and end-user tape products. Its customer base includes aerospace, architecture and construction, electronics, entertainment, hospitality, food, graphic arts, healthcare, personal care, packaging, personal care, recreation, and transportation industries.

2. Current Training Project Details

Purpose of Training	<p>This will be MBK's third ETP Agreement, the third in the last five years. The prior Agreement (ET16-0134) focused on equipment purchased during the term.</p> <p>For this proposal, MBK is moving to a larger headquarters investing \$250K in building upgrades which includes new Information Technology (IT) cabling and a new Nissan 5000-lb. capacity forklift. The new facility has nearly double the space of its current location and will house a new state-of-the-art 2000-sq.-ft. ISO Class 8 Clean Room. This will require companywide training in Clean Room Procedures, including proper gowning, material handling, packing requirements, filter and ducting procedures, ingress/egress and testing, and air quality certification.</p> <p>Additionally, MBK will be upgrading its ISO Standards from 9001:2000 to 9001:2015, requiring training of all employees. The Company is also purchasing a new ERP System that will allow real-time production and costing/forecasting reports.</p>
Training Infrastructure and Administrative Plan	Training will be delivered by in-house staff and vendors, if necessary. MBK's Controller will oversee training and internal administration of this project. MBK has also retained an outside administrative consultant to ensure that all training records meet ETP compliance.
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

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations (Attachment 1) will receive Class/Lab Business Skills, Computer Skills, Continuous Improvement, and Manufacturing Skills (Attachment 2).	

4. Additional Company or Training Project Details

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$2,900
Administrative	Training Funding Source	Seal Beach	Not to exceed 13% of Earned Funds
Training	To Be Determined		TBD

4.3 Previous ETP Project Summary

The table below summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET16-0134	Los Angeles	07/21/15-07/20/17	\$49,920	\$49,920	100%
ET13-0380	Los Angeles	05/10/13-05/09/15	\$48,360	\$48,360	100%

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Communication/Conflict Resolution
	Customer Service Excellence
	Financial Analysis
	Inventory Management System
	Leadership and Team Development
	Marketing
	Organizational and Time Management
	Product Data Management
	Sales
Computer Skills (Standard)	AutoCad LT v 2015
	Crystal Reports
	Customer Management
	Label Matrix Barcode
	Microsoft Office
	Query Report Writer
	QuickBooks
	Shop Tech ERP
	UPS/FEDX Supply Chain
Continuous Improvement Skills	AS9100
	Critical Thinking
	Document Management
	Error Proofing Business Practices
	ISO 9001:2015
	Kaizen Concepts
	Process Performance Measures
	Quality Management Systems
Manufacturing Skills (ME) (Standard)	Best Production Methods
	Lean Thinking Practices
	Operational Planning and Processes
	Production Machinery
	Reliability Centered Maintenance (RCM)
	Supply Chain Management
	Warehouse Management
	Workplace Organization/5S



**TRAINING PROPOSAL FOR
Monster City Studios
17-0911**

Panel Meeting Date: 12/08/2017
Regional Office: Sacramento Regional Office
Analyst Name: Jesse Dongallo
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$18,200.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$18,200.00	N/A	\$0.00	\$30,000.00

APPLICANT PROFILE

Company Summary	Monster City Studios (Monster City)(monstercitystudios.com) manufactures theme-based simulated environments using foam, clay and other materials to make 3D facades, sets and characters for the entertainment industry.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 13	US: 13	World Wide: 13
Turnover Rate (Applicant)	10.00 %		
Repeat Contractor	Yes		
High Unemployment Area	Yes		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Training will focus on new production equipment, and quality process improvements to meet industry demands.
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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	13	\$26.00	40	\$1,040	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	3	\$26.00	60	\$1,560	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2012 and headquartered in Fresno, Monster City manufactures art-based simulated themed environments. These environments are created by using cutting edge technology applied to foam, clay and other materials.

The created 3D facades, sets and characters are used for various platforms in the entertainment industry and commercial markets, such as restaurants. Companies, such as Disney and Marvel, use Monster City products in their production sets for movies and television shows.

In addition, the Company actively produces themed environments for the California State Fair, numerous amusement parks, aquariums, zoos, museums, trade shows and major cinema chains.

Training will be conducted at the Company's single facility in Fresno.

2. Current Training Project Details

Purpose of Training

This is Monster City's second ETP contract, and second within the last five years.

Training in this proposal will focus on new industry demands and quality production improvements. The continuous evolution of the entertainment industry requires Monster City to simultaneously adapt and move into new cutting edge product lines. Customers such as, Disney and Marvel have placed new product requirements which require staff training on the latest technology advances.

To improve production efficiencies and to meet increased demand, Monster City purchased new equipment for its Hot Wire Foam, CNC, and Finish Tech Assembly departments. Staff will receive intense training on new projection mapping, cutting-edge toolkits, animatronics technology, clay maquette molding/sculpting, and Mathews Paint System operation.

In the prior ETP Agreement, training on new equipment and production processes. Even though some training topics are similar in this proposal, trainees will not receive duplicate training. Some training topics are repeated because they were not completely delivered or it is an advance version of the course.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	<p>Monster City's Chief Financial Officer, in conjunction with the General Manager will oversee all training.</p> <p>The Company President, will deliver much of the training along with two other department Managers with varied technical expertise.</p> <p>In addition, Monster City has obtained the services of Strategic Business Solutions, LLC.</p>
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1 will receive training applicable to their jobs in Business, Commercial, Computer, Continuous Improvement, and Manufacturing Skills listed under Attachment 2.	

4. Additional Company or Training Project Details

Retrainee - Job Creation

The Panel offers incentives to companies that commit to hiring new employees, Training for newly-hired employees will be reimbursed at a higher rate, and subject to a lower post-retention wage. The reimbursement rates for Job Creation, under this contract will be:

- \$26 for Class/Lab training

Monster City has committed to hiring three net new employees and represents that the date-of-hire for these trainees will be within the three-month period before contract approval or within the term of contract. These trainees will be hired into "net new jobs" as a condition of the contract.

Monster City is expanding its workforce for the following reasons:

The Company is hiring staff to meet new customer and industry demand. Monster City is increasing its production capacity to coincide with the expansion of movie and television set productions, as well as various theme events and locations. These new workers will require ample training to develop the perquisite skills to become proficient in the new equipment and facilitate this anticipated growth.

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

Monster City has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Strategic Business Solutions, LLC	Visalia	\$1,820.00
Administrative	Strategic Business Solutions, LLC	Visalia	13% of payment earned
Training	N/A	N/A	N/A

4.3 Previous ETP Project Summary

The table below summarizes the active performance under the ETP contract.

Active Contract(s) Elements	Summary
Contract Number	ET16-0160
Purpose of Training	New equipment and process improvement training
Location(s)	Fresno
Term	08/19/2015 – 08/18/2017
Approved Amount	\$15,600
Projected Earnings	\$15,522
Performance Percentage	99%
Trainee Details	ETP Online System shows 597 reimbursable hours uploaded. All trainees have completed the retention period and have met the post-retention wage requirement. The contract is currently pending close-out with ETP fiscal.
Other Notes	N/A

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Strategic Planning
Commercial Skills (Standard)	Animatronics
	Lighting Effects Principles
	Principles of Animation
	Projection Mapping
Computer Skills (Standard)	CAD/CAD3D
Continuous Improvement Skills	Leadership
	LEAN Principles
	Quality Control Systems and Standards
	Teambuilding
	Time Management
Manufacturing Skills (ME) (Standard)	Clay Maquette Molding/Sculpting
	Computer-Assisted Machinery Operation and Program
	Cross Training Across Disciplines
	Foam/Hot Wire Techniques Assembly and Finish
	Mathews Paint System Operation



TRAINING PROPOSAL FOR
Mytility Corp
17-0887

Panel Meeting Date: 12/08/2017
Regional Office: San Francisco Bay Area Regional Office
Analyst Name: Samantha Wang
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:		\$ 15,840.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 15,840.00	N/A	\$ 0.00	\$ 35,000.00

APPLICANT PROFILE

Company Summary	Mytility Corp. (Mytility) (http://itility.nl/) is an information technology (IT) consultancy firm and engineering office that helps to drive change from traditional IT towards utility-based IT.
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Industry Sector(s)	Professional, Scientific, and Technical		
Priority Industry	No		
No. Employees (Applicant)	State: 6	US: 7	World Wide: 170
Turnover Rate (Applicant)	20.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Training Objective(s)	Mytility will train employees on several technologies such as Citrix XenServer, Citrix XenApp, Citrix XenDesktop, EMC ScaleIO, and Linux so they can obtain skills to provide expert advice and service.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Retrainee	6	\$ 22.00	60	\$ 1320	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	6	\$ 22.00	60	\$ 1320	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Mytility, a subsidiary of Itility, LLC founded in 2006 in the Netherlands, opened in San Jose in 2016. Mytility offers consulting and engineering for budgeting, designing, implementing and managing utility-based IT infrastructures (designing IT programs from a usage perspective as opposed to designing from a traditional computer- hardware function perspective). Through consultation, platform designs are assembled by merging hardware, software, and cloud components, running applications and infrastructures together to generate automated, uninterrupted, predictable, and scalable data while keeping configurations under control.

Mytility works with several global high-tech companies in the Netherlands and in the United States including Marel, NXP, Vanderlane, Nokia, and ASML.

2. Current Training Project Details

Purpose of Training

The IT industry is constantly changing; technologies, software, and platforms are constantly updated and companies are hedging costs by moving IT infrastructure to the cloud. Consequently, staff must be up-to-date in various virtualization techniques such as Citrix XenServer, Citrix XenDesktop, and Amazon cloud to be able to serve customers.

Mytility will be hiring six new employees for this proposal. All staff will receive the following training through Class/Lab, E-Learning, and/or Computer-Based Training (CBT):

- Computer Skills - Training topics include Puppet, Docker, Python, and Citrix Xenserver to ensure that all staff learns and masters specific technology components that are required in assisting their customers.
- Business Skills - Training will ensure each service is being offered in a professional and optimal manner. For example, the "Making Meeting Minutes" training will enable staff to create meeting notes in a way that they can document important information while continuously listening and interacting with the customers.
- Continuous Improvement - This training will help improve the delivery of the service to the customers. Training topics include Project Management and Smart Factory which educates staff on how a software or application can be used for certain types of projects.
- Literacy Skills - For some staff, English is their second language. This training will ensure that staff will be able to clearly communicate in English.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Training will be provided at Mytility's San Jose facility by qualified internal staff. The Director will oversee all training and administrative duties.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1 will receive training applicable to their jobs in Business, Computer, Continuous Improvement, and Literacy Skills topics listed under Attachment 2.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
Trainees will receive Computer-Based Training in Computer Skills topics listed under Attachment 2.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
Trainees will receive E-Learning training in Computer Skills topics listed under Attachment 2.	

4. Additional Company or Training Project Details

Retrainee - Job Creation

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

Mytility will be expanding business capacity by hiring new employees as the current staff is having difficulties providing services to its customers due to increasing demand. The Company has committed to hiring 6 new employees (Group 2): three DevOps Engineers, two Project Manager and one Data Scientist. 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.

PROPOSED TRAINING PROJECT DETAILS

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 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	4-2-1 Methodology
	Consultancy Skills Bootcamp
	Deliver Your Message (Listening & Presenting)
	Getting Things Done
	Insights Extensive Training
	Insights Light
	Leadership (S1, S2, S3, S4 theory)
	Making Meeting Minutes
	Match Your Audience
	Match Your Message
Computer Skills (Standard)	Ansible
	Puppet (Advanced)
	Python training
	R Class: R Training for Analytics
	Solidfire
Continuous Improvement Skills	App washing
	Dev Light
	Project Management Light
	Smart Factory
Literacy Skills	Quality in English (US)

<i>Delivery Method /Level</i>	<i>E-Learning ±Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Computer Skills (Standard)	Apache Hadoop
	CMB-310: XenApp, XenDesktop, and Provisioning
	Linux: Red Hat Enterprise Linux fundamentals
	Solidfire (Advanced)
	Splunk Administration
	Splunk Fundamentals
	Splunk Troubleshooting
	Stack for Non-Tech

Attachment 2 - Training Delivery and Curriculum Listing

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

	VEEAM
	VSAN

Delivery Method /Level	E-Learning ±Computer Based Training (CBT)	
Training Type (Level)	Planned Course Offerings	Standard Hours
Computer Skills	Amazon AWS Certified Solution Architect Training	7.00
	Amazon AWS Sysops Administrator Associate	8.00
	Amazon Web Services (AWS) Essentials	7.00
	Azure: Fund of Azure Cloud Services and Storage	2.00
	Azure: Microsoft Azure Fundamentals	6.00
	Azure: Windows Azure Infrastructure as a Service	4.50
	Dell/EMC ScaleIO	6.00
	Docker (Tntroduction)	2.00
	Linux: Linux Advanced File Sys Mgt (LPIC-2)	4.00
	Linux: Red Hat Enterprise Linux (RHEL) Storage Fund	6.50
	Linux: RHEL Shell Fundamentals	2.00
	MS Excel Training	2.00
	Puppet Fundamentals for System Administrators	5.50
	XenApp and XenDesktop 7.6 Foundations	6.00



**TRAINING PROPOSAL FOR
Next Level Internet, Inc.
17-0831**

Panel Meeting Date 12/08/2017
Delegation Order Date: 11/07/2017
Regional Office: San Diego Regional Office
Analyst Name: Clady, Cassandra
Type of Proposal: Single Employer Contract (SE)
Funding Source: OSC

FUNDING OVERVIEW:

TOTAL ETP FUNDING: \$33,800.00				
Training Cost	Admin Cost	Support Cost	Substantial Contribution	Total In-Kind
\$29,392.00	\$4,408.00	N/A	\$0.00	\$58,330.00

PROJECT PROFILE:

Repeat Contractor:	No			
Estimated Number of Trainees:	26	High Unemployment Area:	No	
No. of Employees: (Applicant)	State:27 US:27 WorldWide:27	Turnover Rate: (Applicant)	5.00%	

Industry Sector(s)	Priority Industry
Professional, Scientific, and Technical	Yes

FUNDING DETAILS:

Funding	Group No.	Attributes	Estimated No. of Trainees	Weighted Average Hours	Reimbursed Rate	Average Cost Per Trainee
OSC	1	S-RET	26	50	\$26.00	\$1,300.00
Total:			26			

TRAINING PLAN OVERVIEW:

Job Title	County of Workplace Location	Estimated Number of Trainees	Training Hours (Min-Max)	Wage Waiver	ETP Min Wage	Base Wage Range	Health Benefits Used	ETP Required Wage
Group #: 1	Attributes: S-RET				Reimbursement Rate: \$26.00			
Administrative	San Diego County	3	8-60		\$16.72	\$14.22 - \$29.00	\$2.50	\$16.72
Client Services	San Diego County	3	8-60		\$16.72	\$20.00 - \$45.00	0.00	\$16.72
engineers	San Diego County	9	8-60		\$16.72	\$19.22 - \$41.00	0.00	\$16.72
Supervisor/Manager	San Diego County	5	8-60		\$16.72	\$30.00 - \$59.00	0.00	\$16.72
technical support	San Diego County	6	8-60		\$16.72	\$14.22 - \$39.00	\$2.50	\$16.72

Legend of Attributes	
Code	Description
S	Single Employer Contract
RET	Retrainee

INTRODUCTION

Next Level Internet, Inc., (Next Level), seeks ETP funding for retraining. Founded in 1999, the Company is headquartered at its sole facility in San Diego.

Next Level meets the Panel's Out-of-State Competition (OSC). Training will be conducted at the following location(s): San Diego, CA.

Products / Services

Next Level is a cloud based internet, voice and co-location service provider for businesses which deliver the functionality, scalability and reliability to meet the challenges of today's businesses. The company also helps its customers with internet connections with QoS and 24/7 monitoring, co-location/data center and unified business communications.

Customer Base

The target customers of Next Level Internet are: Biotech, technology, law firms, accounting firms, financial and manufacturing companies.

PROJECT DETAILS

Purpose of Training

Next Level Internet has been in business for 17 years and needs to continually train its employees to keep up with the ongoing changes in technology. The unified communications industry is constantly changing with added features and services. The Company's philosophy is better trained employees means happier clients for Next Level Internet. Larger companies like AT& T, Verizon and Cox as well as smaller and new competitors, forces Next Level to continually improve its technology and keep employees well trained.

Next Level has committed to adding new software to remain competitive. The Company will implement a new ticketing system, Sysaid, and a new Customer Relationship Management System, Salesforce.com. These new software applications, as well as NetSapiens voice switch and Timebill billing system, are constantly advancing which requires employee training.

ETP training will ensure employees are proficient with newly incorporated systems that will increase productivity and product quality. Workers will learn new skills increasing compensation and resulting in continued a low turnover rate.

TRAINING DETAILS

Location	Substantial Contribution	Level Of Reduction
Nextlevel Internet Inc.	\$0.00	0.00%

TRAINING PLAN

The following types of training will be provided to meet its business training needs:

The majority of training will focus on software training as well as numerous sales, administration and business topics. The software training is necessary to the core of its business and is extensive. The number of training hours will be in excess of those funded by ETP.

The above training provided to Next Level employees with increased Internet product knowledge, as well as industry knowledge to allow Next Level Internet to remain competitive.

Training Curriculum		
Delivery Method - Type	Training Type	Training Level
Classroom/Simulated Laboratory	Business Skills	
Classroom/Simulated Laboratory	Computer Skills	Standard
Classroom/Simulated Laboratory	Continuous Improvement Skills	

Training Infrastructure

The Chief Financial Officer will have oversight of this project, and will ensure all training is scheduled and documented per ETP record keeping requirements. Next Level will utilize a subcontractor for the ETP project administration duties including enrolling trainees, and tracking reporting training hours.

Turnover Rate		
Location	City	Turnover Rate Percent
Next Level Internet Inc.	San Diego	5.00%

SUBCONTRACTOR

Admin		
Subcontractor Name	City	Service Cost
Training Funding Source	Seal Beach	13% of earned funds

Nextlevel retained the below Development Sub Contractor(s) to perform Development services for a fee shown in the table and fee not to exceed \$2,500.00

Development		
Subcontractor Name	City	Service Cost
Training Funding Source	Seal Beach	\$2,500.00

PERFORMANCE

Active Contract

N/A

Prior Performance

N/A

RECOMMENDATION

For the reasons set forth above, staff recommends approval.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Coaching/Communication
	customer experience/user experience (CX/UX)
	leadership
	product knowledge
	Sales/Business Development
	work processes/procedures
Computer Skills (Standard)	Adrenaline Image Processing Engine (AIPE)
	BCDR (Business Continuity Disaster Recovery)
	Cisco Routers, Switches and Firewalls
	Citrix
	Cloud backup/Storage/Services
	Data Backup
	Database Administration
	Disaster recovery/ IT Technology
	Dot Net Framework (.Net)
	Email
	Extensible Markup Language (XML)
	GoToMeeting
	HyperText Markup Language (HTML)
	Internet Protocol Phone Systems
	Manuela
	Microsoft Link/Office/Project/SharePoint/Exchange / Visio
	Netsapiens
	Network Monitoring
	Nextmeeting
	OpsGeneie
	Polycom
	QuickBooks
	Salesforce (CRM)
	SDWan
	Shoretel
	SuperMicro
	Sysaide
	TimelyBill
	Veeam
	Virtualization Tools
	VMware
	Windows Server, 10
Yealink	
Continuous Improvement Skills	computer science user experience (CS/UX)
	Goal setting
	Problem Solving
	Process/Quality/Productivity Improvements
	Teamwork
Continuous Improvement Skills	Time management



**TRAINING PROPOSAL FOR
PACIFIC COMPANIES, INC
17-0885**

Delegation Order Date: 10/25/2017
Regional Office: San Diego Regional Office
Analyst Name: Heather Bernard
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: \$ 44,880.00			
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 44,880.00	N/A	\$ 0.00	\$ 88,500.00

APPLICANT PROFILE

Company Summary	Pacific Companies provides physician recruiting, employment and placement services for permanent and temporary employment in physician positions.
------------------------	---

Industry Sector(s)	Administrative Services
Priority Industry	No
No. of Employees (Applicant)	State: 32 US: 34 World Wide: 34
Turnover Rate (Applicant)	10.00 %
Repeat Contractor	No
High Unemployment Area	No
Unions	N/A

TRAINING PROFILE

Training Objective	Training will focus on changes to the healthcare industry and medical knowledge. The Company will provide training on its new Customer Relationship Management (CRM) system. Pacific Companies will also provide training to newly hired recruiters.
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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	32	\$ 22.00	45	\$ 990	8 - 60
2	Job Creation – Retrainee Initiative Program, Retrainee	10	\$ 22.00	60	\$ 1320	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Pacific Companies, Inc., (Pacific Companies), seeks ETP funding for retraining. Founded in 2002, the Company is headquartered in Aliso Viejo. Pacific Companies provides recruiting and job placement services for physicians in permanent and temporary positions. The Company serves diverse customers in the healthcare industry including private practices, hospitals, integrated health systems, physicians, and medical practices. Customers include St. Anthony Hospital, St. Charles Medical Center, Tenet Healthcare, and Tulare Local Health. Aliso Viejo is the sole location participating in this Agreement.

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

Currently, the healthcare industry is in a period of extensive growth. With a Shortage of physicians and 20 million more people insured with the implementation of the ACA, adding more customers for medical providers. With the aging baby boomer population requiring substantial medical care, the physician shortage was compounded drastically. Subsequently, healthcare providers across all delivery systems and medical specialties are in great need of qualified personnel.

Pacific Companies is in a period of growth expected to continue well into the future. Earlier this year, the Company moved to a larger office space in order to accommodate more staff. Pacific Companies plans to hire 30 new staff in the next two years, nine in this quarter alone.

Additionally, the Company's implementation of the new CRM software, Bullhorn, requires training. The new CRM software will affect all departments and require staff training.

Training is ongoing at Pacific Companies for new-hires and incumbent staff. It takes approximately 2 years for staff to become efficient in their jobs. This is a result of the highly specialized fields within which the Company works. Staff requires training on medical terminology, medical specialties and medical equipment to be able to successfully work with clients. They must also understand personnel contracts, recruiting skills, billing & invoicing clients and aspects of the recruiting process. Pacific Companies currently provides staff training on gastroenterology, physician residencies, medical procedures, medical equipment, orthopedic specialties, pediatrics, medical economics and physician compensation structures.

PROPOSED TRAINING PROJECT DETAILS

	Pacific Companies has one dedicated Corporate Trainer who provides daily training. New Hire staff train 7 hours per day for the first 3 weeks of employment and incumbent staff receive training at least once per week or more depending on business needs.
Training Infrastructure and Administrative Plan	The Company's President will oversee training and Corporate Trainer will schedule training and collect the ETP rosters. Training Funding Source will provide administrative services, assisting with the upload and data entry of training hours into ETP's Online Systems. Training will be delivered by in-house trainers and vendors to be determined after approval of the project.
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	
Class/Lab training will be provided to Administrative Staff, Recruiters, Sales Staff and Supervisor/Managers in Business Skills, Computer Skills and Continuous Improvement Skills (See Attachment 2)	

4. Additional Company or Training Project Details

Retrainee/Job Creation

Pacific Companies is in a period of growth and has expanded its existing facilities, expanding business capacity by adding newly-hired employees to an existing function. The Company expects to hire in all departments to keep up with customers' needs. As such, the Company is requesting training funds for 10 new Recruiters to be included in the Job Creation Job Group. These trainees will be placed into net new jobs.

4.1 Program Waivers

N/A

PROPOSED TRAINING PROJECT DETAILS

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or %
Development	Training Funding Source	Seal Beach	\$ 2,900.00
Administrative	Training Funding Source	Seal Beach	13% of payment earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

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.

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Business Development
	Client Relations
	Coaching/Communication skills
	Contract negotiation & Administration Skills
	Email Etiquette
	Leadership Skills
	Medical Economics
	Physician Credentialing
	Physician specialty's
	Presentation skills
	Recruiting skills
	Running Effective Meetings
	Sales skills
	Standard Operating Procedures (SOP's)
	Time Management skills
Computer Skills (Standard)	Account Set-Up
	Activity Metrics Development and Tracking
	Applicant Tracking System (Bullhorn)
	Background Check processing
	Client Implementation procedures
	Customer data management
	Database Management
	Marketing skills
	Microsoft Office suite
	Payroll Processing
	Quarter End and Year End Processing
	Quickbooks
	Risk Management
	Standard Operating Procedures (SOP's)
	Telephone Skills
Time Management	
Continuous Improvement Skills	Business Planning and Development
	Change Management Skills
	key performance indicators (KPI)
	Problem Solving Skills
	Process/Quality/Performance Improvement
	Teambuilding skills



**TRAINING PROPOSAL FOR
Socal Accessory Production Inc.
17-0822**

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Mark Reeves
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 21,840.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 21,840.00	N/A	\$ 0.00	\$ 10,920.00

APPLICANT PROFILE

Company Summary	Headquartered in Los Angeles, Socal Accessory Production Inc. (Socal) manufactures component parts and accessories for high-end women's handbags.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 36	US: 36	World Wide: 36
Turnover Rate (Applicant)	1.00 %		
Repeat Contractor	No		
High Unemployment Area	No		
Union(s)	N/A		

TRAINING PROFILE

Socal's recent automation improvements to enhance the Company's manufacturing processes require employees to upgrade skills.

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

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Job Creation – Retrainee Initiative Program, Retrainee	6	\$ 26.00	60	\$ 1560	8 - 60
2	Retrainee	8	\$ 26.00	60	\$ 1560	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2011, Socal manufactures parts and accessories for designer line handbags. The Company's products include handles, inside pockets, side cinches, key fobs, and zipper pullers and can be found on designer lines such as Community, For Love, Lemon, Newbark, Marais and John Geiger. This Company is affiliated with La La Land Production & Design by common ownership, which has elected to manage each ETP project independently for administrative purposes.

2. Current Training Project Details

Purpose of Training	<p>Socal has developed a comprehensive training plan that covers many facets of the Company's overall business functions. However, training will focus on processes since the Company recently purchased manufacturing equipment including a hydraulic press, folding machines, hot stamp machines and a skiving machine. Employees will learn to operate and maintain equipment. Employees will also be cross-trained to perform multiple production tasks on various systems and equipment. Training will put the Company in the best position to meet strict customer specifications, increase production, and expand product offerings.</p> <p>Additionally, Socal has committed to hiring six new Production Assistants during the contract term. Training will take place at Socal's facility in Los Angeles. Instruction will be provided by in-house subject matter experts. The Company may also utilize specialized training vendors, when necessary.</p>
Training Infrastructure and Administrative Plan	Socal spends approximately \$25,000 annually on training. The Company's training and leadership team will deliver, schedule, and document training. Socal has also retained an administrative consultant to ensure that all training and documentation adhere to ETP requirements.
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

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Business Skills, Computer Skills, and Continuous Improvement. Sewers, Cutters, and Pattern Makers will also receive Manufacturing Skills, Hazardous Materials, and Literacy Skills, as shown in Attachment 2.	

Delivery Method/Level	E-Learning - Computer Based Training (CBT)
Summary	
All occupations will receive up to six hours of CBT Business Skills training, based on job duties.	

4. Additional Company or Training Project Details

Retrainee – Job Creation

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

Socal has committed to hiring six new Production Assistants (Group 1) to support the Company's plan to expand its existing business capacity and increase its product line. 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.

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

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

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Judiths Training Services	Los Angeles	\$ 3,400.00
Administrative	Judiths Training Services	Los Angeles	Not to exceed 13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Attachments 1 and 2 provide additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Accounting
	Administration
	Business Administration
	Business Planning
	Business report writing and editing
	Coaching Procedures
	Conflict Management
	Credit Card Sales
	Customer needs /complaints
	Customer Relations
	Decision making
	Financial Strategy
	Handling Customer Requests
	Identifying Customer Needs
	Interpersonal Skills
	Inventory Control
	Leadership
	Marketing
	Monitoring
	Motivation
	Negotiating
	New production cell planning
	Payroll
	Process/procedure/evaluations
	Product Knowledge
	Production planning
	Refunds and Exchanges
	Resolving Complaints
Team Building	
Telephone Skills	
Voiding Transactions	
Computer Skills (Standard)	Accounting Systems
	Advanced Adobe InDesign
	Advanced Adobe Photoshop
	Advanced Microsoft Excel
	Advanced Microsoft Power Point
	Comelz cutting machine computer operation

Attachment 2 - Training Delivery and Curriculum Listing

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

	Computer Programming/Pattern Making
	Computerized Scheduling
	Cost Accounting
	Elitron cutting machine computer operation
	Elitron pattern making for Handbags
	Elitron Pattern making for shoes
	Engineering/document Control
	General Accounting
	Integrated Material Management
	Intermediate Adobe InDesign
	Intermediate Adobe Photoshop
	Intro to Adobe InDesign
	Intro to Adobe Photoshop
	Inventory Control
	Juki Computer Programming for automatic sewing
	Local Area Networks (LAN)
	Material Resource Planning
	Network Management
	Ormac Computer set up and operation
	Payroll
	Pfaff Programming for automatic sewing machine
	Purchase Order Tracking
	Sales Forecasting
	World Wide Web (WWW)
Continuous Improvement Skills	Decision Making
	Interpreting Charts and graphs
	Just In Time process (JIT)
	Leadership Skills for Frontline Workers
	Problem Solving
	Process Improvement
	Production Operations/workflow
	Production Scheduling
	Quality Concepts
	SPC Methods to monitor quality control
	Strategic Planning, Evaluations, Monitoring
	Team Building
	Total Quality Management
Hazardous Materials Skills	Hazardous chemical cleaning/handling
	Hazardous material handling
	Hazardous waste handling

Attachment 2 - Training Delivery and Curriculum Listing

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

Literacy Skills	Vocational English as a second language
Manufacturing Skills (ME) (Standard)	Cross Training in production equipment/skills
	Cut and crease using Galli machine
	Fabric Stitching
	Folding by hand
	Folding using folding machine
	Gluing using latex spray gluing machine
	Hot stamping and operating the hot stamp machine
	Inspection and Final touch up
	Knife cutting
	Lasting close shoes
	Lasting sandals
	Leather cleaning of excess paint
	Leather cutting by hand
	Leather cutting with Automatic CAM machine
	Leather cutting with Hydraulic Presser
	Leather defect detection training
	Leather evaluation training
	Leather stitching technique
	Machine lasting
	Outsole and insole gluing application
	Outsole eva preparation
	Painting using STF painting booth
	Ruffing and marking lasted shoe
	Skiving using skiving machine
	Splitting using splitter machine
	Toe puff machine operation
Upper conforming machine training	

Delivery Method /Level	E-Learning ±Computer Based Training (CBT)	
Training Type (Level)	Planned Course Offerings	Standard Hours
Business Skills	How to Deliver Grand Slam Customer Service	1.00
	Managing Chaos and Pressure at Work	1.00
	Managing Difficult Situations/Emotions	1.00
	Managing Employees who are Stretched to the Max	1.00
	Managing Heavy Workloads	1.00
	Top 10 Survival Skills for First Time Supervisors	1.00



**TRAINING PROPOSAL FOR
Uniluv Marketing, Inc.
17-0816**

Panel Meeting Date: 12/08/2017
Delegation Order Date: 11/07/2017
Regional Office: San Diego Regional Office
Analyst Name: Cassandra Clady
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 15,600.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 15,600.00	N/A	\$ 0.00	\$ 17,397.00

APPLICANT PROFILE

Company Summary	Uniluv is a manufacturer and wholesaler for Skech smartphones and tablet accessories. The Company is a small business headquartered in San Diego, CA.
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Industry Sector(s)	Manufacturing		
Priority Industry	Yes		
No. Employees (Applicant)	State: 10	US: 10	World Wide: 10
Turnover Rate (Applicant)	7.00 %		
Repeat Contractor	No		

High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	All staff will be trained on a new Enterprises Resource Planning (ERP) system. Uniluv sales and other functional groups will be trained on integrated applications to manage their business related to technologies, services, and human resource needs.
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Training is summarized below, with additional details in *Attachment 1 - Group and Job Title Details* of this Panel Proposal.

#	Group Characteristics	# Of Trainees	Reimbursement Rate	Weighted Avg. Hours	Cost Per Trainee	Min-Max Hours
1	Owner, Retrainee	2	\$ 26.00	60	\$ 1560	8 - 60
1	Retrainee	8	\$ 26.00	60	\$ 1560	8 - 60

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 2011, Uniluv Marketing Inc. (Uniluv) markets its Skech smart phone and tablet accessories nationally and internationally. Uniluv customers are: small and mid-sized retailers, wireless dealers, and distributors (Target, Walmart, AT & T corporate and T- mobile corporate).

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>Uniluv needs to expand its customer market base. In order to facilitate the growth of its business, a ERP system was purchased in May 2017. The ERP systems contains business management software applications that will allow Uniluv to integrate and manage its core technology based business with back office functions, services, and human resource needs. The Company's current software systems are not capable of meeting internal needs, as well as customer needs. In addition, Uniluv currently has no automated backup which results in loss of data from customers.</p> <p>Implementation of the new ERP software will improve productivity, increase efficiency, and streamline processes. ERP training will be provided to all staff by a Folio 3 (NetSuite) implementation specialist. Training will include configuring and setting up new platforms based on department structure. Folio 3 implementation specialist will also "Train the Trainer." There will be multiple demonstrations of new software conducted. Upon completion of the demonstrations, Uniluv will hold on-site training sessions for all employees based on departments. (Sales, Training, Management, Logistics, Purchasing, Warehouse, and Accounting).</p> <p>In addition to ERP training, Uniluv will implement a Customer Service Management Database (CRM) which will maintain existing sales accounts, increase sales, acquire new leads, and sales opportunities. Training will be provided to all 10 employees in computer skills, business skills, and management skills. The Company's current training budget is \$25,00.00.</p> <p>ETP funded training will allow Uniluv to utilize its new ERP and CRM systems to maintain and expand its business in order to remain competitive.</p>
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PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	The Executive Assistant will have oversight of this project to ensure training is scheduled and documented per ETP record keeping requirements. Uniluv will not utilize a sub-contractor.
Marketing Plan (MEC Only)	N/A
Support Cost Description (MEC Only)	N/A
Substantial Contribution Description	N/A

3. Curriculum Summary

Provided here is a summary of the curriculum that will be delivered. *Attachment 2 - Training Delivery and Curriculum Listing* provides full detail on the training that will be provided.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations identified in Attachment 1 will receive training applicable to their jobs in: Business Skills, Computer Skills, and Management Skills under Attachment 2.	

4. Additional Company or Training Project Details

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

4.1 Program Waivers

No waivers have been applied to this proposed project.

4.2 Subcontractor Summary

N/A

4.3 Previous ETP Project Summary

N/A

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>Classroom/Simulated Laboratory</i>
Training Type (Level)	Planned Course Offerings
Business Skills	Communication Skills
	Customer Service
	Project Management
	Sales Efficiency Skills
Computer Skills (Standard)	Basic NetSuite Functions
	NetSuite Shortcuts
	NetSuite Systems Preview
	Operating in Netsuite
Management Skills	Decision-Making Skills
	Department Functionality
	Department Workflow
	Team Building



TRAINING PROPOSAL FOR

Windes, Inc.

17-0753

Panel Meeting Date: 12/08/2017

Delegation Order Date: 11/16/2017

Regional Office: North Hollywood Regional Office

Analyst Name: Elsa Wadzinski

Type of Proposal: Single Employer

Funding Source: Out of State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$ 34,650.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$ 34,650.00	N/A	\$ 0.00	\$ 174,048.00

APPLICANT PROFILE

	Accounting firm serving clients in the automotive, construction, manufacturing, distribution, nonprofit and real estate industries.
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Industry Sector(s)	Professional, Scientific and Technical
Priority Industry	No
No. Employees (Applicant)	State: 127 US: 127 World Wide: 127
Turnover Rate (Applicant)	5.00 %
Repeat Contractor	Yes
High Unemployment Area	No

Union(s)	N/A
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TRAINING PROFILE

Training Objective(s)	Training is intended to increase business by adding new clients and offering new professional 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	105	\$ 15.00	22	\$ 330	8 - 200

PROPOSED TRAINING PROJECT DETAILS

Provided here are the details for the proposed Training Project.

1. Company Background

Founded in 1926, Windes, Inc. (Windes) (www.windes.com) provides consulting services to publicly traded and privately held businesses, nonprofit organizations, and individuals. Windes offers a full range of services including audit and assurance, tax and accounting, employee benefits, estate and trust planning, business advisory, human resources consulting, litigation support, business valuation, and merger/acquisition assistance. Company employees possess industry expertise in financial services, construction, energy, hospitality and leisure, manufacturing, healthcare, nonprofit organizations, real estate, retail, technology, transportation, and distribution. Windes is headquartered in Long Beach with additional offices in Los Angeles and Irvine. Training under this Agreement will be for the Long Beach and Irvine locations. This will be Windes second ETP Agreement.

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	The purpose of training is to improve employee skills so they can provide customer solutions, many related to governmental and regulatory changes. Some of these changes include tax law, regulations, foreign trade and treaties, healthcare law and employee benefit plans. Employees must be knowledgeable of changes.
Training Infrastructure and Administrative Plan	The Director of Operations will oversee project training and administration. An administrative staff in each training location will be responsible for rosters. A third party administrator will assist in the administration of this project.
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.

PROPOSED TRAINING PROJECT DETAILS

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive training in Business Skills, Commercial Skills, and Computer Skills.	

Delivery Method/Level	E-Learning - Instructor Led/Distance Learning
Summary	
All occupations will receive E-Learning training in Commercial Skills.	

4. Additional Company or Training Project Details

4.1 Program Waivers

Waivers	Description
None have been requested	

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 Refund Group	Anaheim	\$5,000
Administrative	Training Refund Group	Anaheim	13% of funding Earned
Training	None selected to date	N/A	N/A

4.3 Previous ETP Project Summary

The table on the following page summarizes Contractor's performance under prior ETP contract(s) completed within the last five years.

PROPOSED TRAINING PROJECT DETAILS

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET15-0439	Long Beach/Irvine	05/01/15-04/30/17	\$81,360	\$34,033	42%
Notes	<p>Poor prior performance was due to an unapproved change in training delivery method from class lab to distance learning. In addition, recordkeeping requirements (training documentation) were not met about 12 – 14 months into the term of the Agreement. Subsequently, the Contractor now has a clear understanding of the importance of discussing any changes that were not included in the original training plan with ETP staff.</p> <p>In the proposed Agreement, training will be delivered via distance learning. The Contract amount has been right-sized to reflect prior earnings.</p>				

4.4 Supporting Panel Proposal Documentation

Provided in Attachments 1 and 2 are additional application details on the intended training population, the detailed curriculum, and associated program characteristics that are related to this proposed Training Project.

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory
Training Type (Level)	Planned Course Offerings
Business Skills	Administration
	Communication
	Efficiency
	Leadership
	Networking
	Networking and marketing
	Project Management
	Providing Feedback
	Selling Skills
	Team Building
	Time Management
Commercial Skills (Standard)	Accounting & Auditing Update
	Audit Watch
	Best Practices
	Business Valuation
	Education Foundation Topics
	Employee Benefit Plan Topics
	Employee Retirement Income Security Act (ERISA)
	Employee Stock Option Plan Topics
	Estates & Trusts
	Fraud Detection and Prevention
	Government Update
	Not for Profit Topics
	Regulatory Review
	Securities Exchange Commission Topics
	Tax Update
	Tax Watch
Computer Skills (Standard)	Adobe Software Suite
	Becker CPE
	CCH Software Suite
	Checkpoint Research
	LC Vista
	Microsoft Office
	Peachtree
	ProStaff
	QuickBooks
	Sage 100
	T-Value
	Technology Security Update
	XCM Solutions

Attachment 2 - Training Delivery and Curriculum Listing

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

<i>Delivery Method /Level</i>	<i>E-Learning – Instructor Led/Distance Learning</i>
Training Type (Level)	Planned Course Offerings
Commercial Skills (Standard)	Accounting and Auditing Updates
	Employee Retirement Income Security Act (ERISA)
	Fraud Detection and Prevention
	Government Update
	Regulatory Review



**TRAINING PROPOSAL FOR
Zobrist Consulting Group, Inc.
17-0915**

Panel Meeting Date: 12/08/2017
Regional Office: North Hollywood Regional Office
Analyst Name: Lan Vuong
Type of Proposal: Single Employer (SB), Small Business Program
Funding Source: Out-of-State Competition

FUNDING OVERVIEW

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

TOTAL ETP FUNDING:		\$49,920.00	
Program & Admin Cost	Support Cost (\$)	Substantial Contribution (\$)	Total In-Kind
\$49,920.00	N/A	\$0.00	\$115,000.00

APPLICANT PROFILE

Company Summary	Zobrist Consulting Group, Inc. (Zobrist) designs and develops computer software (ecommerce) to enable small- and medium-sized businesses to sell products online. The Company focuses on online-based clients that need personalized services to speed up the online delivery process.
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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	Yes
High Unemployment Area	No
Union(s)	N/A

TRAINING PROFILE

Training Objective(s)	Training will provide workers with the technical skills required to integrate new services and products, adapt to new technologies and systems, improve customer services, design a quick response time and reduce costs.
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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	39	\$26.00	48	\$1,248	8 - 60
1	Retrainee - Owner	1	\$26.00	48	\$1,248	8 - 60

PROPOSED TRAINING PROJECT DETAILS

1. Company Background

Founded in 2001 and located in Woodland Hills and Irvine, Zobrist is an IBM Websphere Commerce Technology Partner, providing industry leading IBM ecommerce platforms and consulting/internet software services and products. Its services assist clients manage databases, emails, merchandise, financials, technical support, payment solutions, assessment and security services. In addition, Zobrist's unique business model and software flexibility, offers website personalization services (i.e., user convenience, security and 24/7 availability). Major customers include Vans, JanSport, 3M, The North Face, Lee Jeans, Wrangler, The Cheesecake Factory, Coach, Mazda, Paypal, Timberland and Toshiba of America Business Systems.

Training will take place at both locations.

2. Current Training Project Details

Purpose of Training

This will be the Company's second ETP Agreement, and the second within five years. Zobrist had tremendous success in its prior ETP Agreements. Therefore, the Company requests to continue training to further strengthen its business. In the past year, the Company experienced a 15% growth in business and anticipates additional growth of 50% in the coming year; and increase in its workforce. As such, the Company constantly strives for creativity and innovation and has developed a strategy to retain skilled workers, remain competitive, attract new customers and promote continued growth.

For these reasons, the Company continues transitioning to a Cloud technology. To meet this demand, Zobrist has developed two new products, Smart Merchandiser and Mobiecom. These new products allow customers to organize, display products and increase speed on websites and mobile devices. In addition, the Company has expanded its business across the US and in Europe. Due to the time difference between the US and Europe, the Company has also created an automated help desk with artificial intelligence to support customers.

ETP funding will allow Zobrist to lead in the e-commerce marketplace, attract new clients and provide the most cutting edge products. Therefore, training is essential to the Company's business operations and success. This proposal will focus on new technologies, products and services. Some courses may be repeated from prior curriculum; however, trainees will not receive duplicate training. This will be the first training for the majority of workers and will provide highly technical skills in advanced hardware and software programs as well as operation systems, integrate new services and products, adapt to new technologies and keep up with industry changes and customer demands.

PROPOSED TRAINING PROJECT DETAILS

Training Infrastructure and Administrative Plan	Training is scheduled to begin upon approval. Zobrist's Chief Financial Officer will oversee training and administration responsibilities including scheduling training, coordinating with staff, securing rosters and complying with all ETP requirements. Zobrist has also retained a third party administrator for enrollment, data tracking and invoicing. (See Subcontractor below)
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. Class/Laboratory and Videoconference training will be delivered by in-house subject matter experts.

Delivery Method/Level	Classroom/Simulated Laboratory
Summary	
All occupations will receive Class/Lab and Videoconference training in Business, Computer and Continuous Improvement Skills, as shown in detail in Attachment 2.	

4. Additional Company or Training Project Details

4.1 Program Waivers

N/A

4.2 Subcontractor Summary

Zobrist has retained the services of the following Subcontractor.

Subcontractor Type	Subcontractor Name	City	Service Cost or Percentage
Development	Training Funding Source	Seal Beach	\$2,900.00
Administrative	Training Funding Source	Seal Beach	13% of payment earned
Training	None selected to date	N/A	N/A

PROPOSED TRAINING PROJECT DETAILS

4.3 Previous ETP Project Summary

The table below summarizes Contractor's performance under prior ETP contracts completed within the last five years.

Previous Contract Activity					
Agreement Number	Location(s)	Term	Approved Amount	Project Earnings	Performance Percentage
ET16-0191	Woodland Hills, Irvine	9/12/15 – 9/11/17	\$46,800	\$46,800	100%
ET14-0100	Woodland Hills, Irvine	8/05/13 – 8/04/15	\$49,920	\$45,380	91%

4.4 Supporting Panel Proposal Documentation

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

Attachment 2 - Training Delivery and Curriculum Listing

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

Delivery Method /Level	Classroom/Simulated Laboratory	
Training Type (Level)	Planned Course Offerings	
Business Skills	Design and Merchandising	
	IBM Partnerworld	
	Marketing and Customer Acquisition	
	Retail Industry	
	Social Networking/Media	
Computer Skills (Standard)	Automated Help Desk	
	BitBucket	
	Bluemix	
	Cloudant Database Technology	
	Content Management System	
	Cognos Advanced Analytics	
	Computer User Usability Guidance	
	Coremetrics	
	Cross-Browser Testing	
	Database 2	
	Electronic Data Interchange	
	ES6	
	Git	
	GraphQL	
	IBM Commerce on Cloud/Sterling Commerce/WebSphere	
	Integration tools (Message Broker, Message Queue, Web Services)	
	Internet of Things	
	JIRA	
	JMeter	
	Node.JS	
	Programming Languages (Javascript, Java, J2EE, Java 2 Enterprise)	
	ReactJS	
	Redis	
	Redux	
	Responsive Web Design	
	Software as a Service	
	Slack	
	Smart Merchandiser	
	Tealeaf	
	WebSphere Commerce Build and Deploy	
	WordPress	
	Continuous Improvement Skills	Agile Refresher
		Knowledge Transfer

Attachment 2 - Training Delivery and Curriculum Listing

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

	Process Improvement
	Social Relations
	Teambuilding